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## INDEX TO THE OAKES NEWSLETTER

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### BRIEF SUMMARY OF ISSUES

Listed in chronological order, these summaries  
briefly describe the contents of each Newsletter.

The Philadelphia School District's Budget - Cuts; the deficit and how it  
accumulated; why the budget increases annually; need for city, state  
and Federal support; necessity to place priority on improved reading  
instruction. (April 1970)

"Reading" - What skills the term includes. The reading deficiency of  
Philadelphia's school children. Necessity to place priority on teaching  
of reading and to improve existing reading program. In one school,  
test scores are improving. (May 1970)

"Teachers' Contract" - Expensive and extensive new demands made by Teach-  
ers' Union for inclusion in 9/1/70 contract. To keep gifted teachers  
in the classroom, new positions should be created, in the administrative  
salary range, combining working with children with responsibility for  
training incoming teachers and para-professionals. (June 1970)

"Teachers' Contract Negotiations" - The issues separating the two sides  
and keeping the schools closed: salary increases, longer high school  
day, teacher absenteeism and accountability. (Sept. 14, 1970)

"Sex Education - What Is The School's Role?" - Need for drastic improvement  
in sex education. Goals of a good program. Need for new curriculum  
which focuses on human sexuality (attitudes, behavior and feelings)  
rather than "facts of life" and specialists to teach it. (Oct. 6, 1970)

"Reading Gets Top Priority" - Increased funds, staff and time finally  
given to reading. Description of reading plans and District 4's guar-  
anteed performance contract. (Nov. 16, 1970)

"New Teachers" - The more than 1500 inexperienced teachers entering the  
school system annually constitute a major problem to themselves and  
their students. Temple University improving teachers' preparation for  
urban classrooms. Lack of black high school teachers, counselors and  
administrators cited as major problem. (Dec. 14, 1970)

"Drugs, Schools and Youth" - Dimensions of drug problem among students and  
its complex causes. The School District's new drug curriculum guide  
and promising programs for preventing drug abuse. (Jan. 18, 1971)

- "8th Graders Choose Their Courses - What Are The Implications, Limitations And Dangers Involved?" - Choice of 9th grade subjects starts student on a track which may lead nowhere instead of to his goal. Students and parents given inadequate information and often subjected to poor counseling. Almost all students should study algebra. (Feb. 15, 1971)
- "Financial Crisis Update" - Chronology and explanation of the threatened closings between May 1968 and March 1971 and discussion of factors which caused budget to increase in size. (March 15, 1971)
- "Integration" - Defines integration and necessity to achieve it and deplores School District's lack of commitment to it. Pennsylvania Human Relations Commission ordered Philadelphia School District to submit desegregation plan and filed a complaint. Newsletter describes hearings on complaint. (April 15, 1971)
- "Learning And Happy" - Description of the Informal Classroom (Open Classroom, Informal Education) which has much to recommend it. A relaxed and friendly place where the emphasis is on the child's learning and not the teacher's teaching. (May 15, 1971)
- "Learning Must Increase With Budget" - Includes description of the high price, in human terms and dollars, of the chaotic financial situation and the need to achieve scholastic success to win public support. (June 16, 1971)
- "Budget Cuts Deep And Harmful" - Impact and implications of significant cuts made in 1971-72 budget. (Sept. 17, 1971)
- "The Drive For Reading Improvement" - Progress made in the first year of a new effort to improve students' reading. Encouraging test results. (Oct. 22, 1971)
- "The Parkway Program" - Description of Philadelphia's "School Without Walls", offering students freedom combined with responsibility for their own decisions. What could be adapted from Parkway and incorporated into existing high schools. (Nov. 18, 1971)
- "Programs Not Padlocks" - Description of Academy of Applied Electrical Science which prepares previously non-achieving students for jobs. Also, the Continuing Education Centers which enable pregnant girls to continue their school work without interruption and assist them in maintaining their physical and mental health. (Dec. 16, 1971)
- "Public Education, Keystone Of Our Republic" - History of long struggle to have free, publicly supported schooling for all. Discussion of its importance. Teaching of democratic values. (Jan. 20, 1972)
- "Student Bill Of Rights And Responsibilities" - Contents of Bill described including rights, grievance procedure, ombudsmen. Value of Bill and why it was developed. (Feb. 18, 1972)
- "Philadelphia Home And School Council, Drastic Reform Essential" - Council could and should organize parents, inform them, set an example of democratic procedures and give leadership to local associations. It could only do this if it underwent drastic reform to make it independent, democratic, membership-directed and adequately supported financially. (March 21, 1972)
- "Money Can Make A Difference" - A response to those who argue that in education it doesn't. Also, an explanation of the increases which caused the budget to almost double in a five year period. (April 21, 1972)



- "How Should Schools Be Financed?" - Discussion of two national studies of school financing. (May 19, 1972)
- "Integrating Philadelphia's Desegregated Schools" - Discussion of one racially balanced high school and what is required to help students develop intergroup understanding and respect. Suggestions made for ways to maintain educational excellence, provide information and news of the school and train staff for solving intergroup problems. Ways in which School District could support and promote its integrated schools. (June 19, 1972)
- "After The Contract Settlement, How Will The Schools Be Kept Open?" - Discusses state subsidy vs. city tax support and the need to borrow cash each fall. (Sept. 11, 1972)
- "Why Are The Philadelphia Public Schools Closed?" - After the city's labor negotiator took over, the Board of Education proposed to the teachers' union that secondary school teachers have larger classes, work a longer day and reassume some non-teaching duties. These proposals chopped away at contract demands previously won and caused the strike. (Sept. 25, 1972)
- "Preparing Students For The World Of Work - The Schools' Role" - Brief description of existing career development programs in Philadelphia and how they should be expanded. Career development is the systematic attempt to increase each student's view of career options and to help students plan and prepare for a career. (Nov. 9, 1972)
- "The Skills Centers" - In simulated business and industrial settings, students learn saleable skills two days per week primarily through self-instruction with the aid of audio-visual materials. (Dec. 15, 1972)
- "The Fact Finder's Report - A Basis For Settlement" - Fact finder appointed to make recommendations for settlement of key issues separating Board of Education and teachers' union. Report included findings on longer school day, preparation periods for elementary school teachers, non-teaching duties, class size and salaries. Findings influenced by School District's lack of funds. (Jan. 5, 1973)
- "A Layman's Guide To The Schools' Financial Crisis" - The 1972-73 deficit and where it came from. Taxes for schools. Supplement lists and explains major taxes paid by individuals and businesses. (Feb. 22, 1973)
- "Outcomes Of The Strike" - Its effects and how major issues were resolved. (March 22, 1973)
- "A Letter About The Budget" - Why all have a stake in the public schools. Why city must increase its level of support. Improvements made in the school system since 1965. What has been cut from the budget. Why budget must be increased by \$48 million. (April 21, 1973)
- "Personnel Policy Decisions" - Description of new teacher selection procedure based on comprehensive profile with emphasis on prior teaching experience instead of National Teacher Examination score alone. Serious deterioration in quality of instruction directly related to proposed slash of 485 teaching positions during summer 1972 and employment halt which followed. (May 21, 1973)
- "Affective Education" - Describes Affective Education, lists some of its identifying characteristics and points out the excellence and wide applicability of its staff training method. (June 25, 1973)

- "How Should Title I Dollars Be Spent?" - A Court suit alleged that the Philadelphia School District had violated Federal mandates in the spending of Title I funds. Four categories of violations described. Explanation of why 45 previously Title I schools became ineligible. Congress's intent in passing Title I. (Sept. 11, 1973)
- "Lamberton And Its Effect On The System" - Lamberton's history. Why a secondary school was added to this elementary school and who it is intended to serve. Its detrimental effect on nearby schools. (Oct. 15, 1973)
- "Retarded Children's Right To Education" - Court suit resulted in agreement guaranteeing all mentally retarded children in the State, regardless of the severity of handicap, a free, public program of education and training appropriate to their learning capacities. Impact on the children. Early school start recommended. Due process hearings for parents dissatisfied with child's placement. (Nov. 15, 1973)
- "Edison High School - A History Of Benign And Malevolent Neglect" - Edison's shameful beginning. Description of ancient, combustible structure. Discussion of proposed site at Front and Luzerne and the opposition to it. (Dec. 14, 1973)
- "Under Court Order To Submit Desegregation Plan" - Description of Board of Education's "Proposed Desegregation Plan" and what a sound plan would have included. Why desegregate? Desegregation on a non-racially identifiable basis - within the city and if a metropolitan regional school system was formed. (Jan. 31, 1974)
- "Teacher Absences And Substitutes" - Teachers' absences are costly to children and the school budget as well. How attendance can be improved. Problem of getting substitutes and improving the quality and quantity of them. (Feb. 28, 1974)
- "Instruction Must Continue Until Year Ends" - Recording of final grades  $1\frac{1}{2}$  to 3 weeks before the end of the year causes students to lose interest in school and teachers to stop classroom instruction. What has occurred in the past is explained and the plans for a change in 1973-74 are detailed. (March 31, 1974)
- "Index To The Oakes Newsletter" - April 1970-March 1974 (April 29, 1974)
- "The Tenure Law" - Definition of tenure, purpose of the law and its provisions, rating of professional employees, causes for dismissal, provision for due process. (May 22, 1974)
- "Gratz High School - The Long Road Back" - Description of Gratz at its low point. The principal's efforts to create a new climate for learning and to achieve excellence: establishing performance standards, reducing student anonymity, upgrading automotive shops, improving self-discipline. (June 15, 1974)
- "The Superintendent Versus The Board Of Education" - Ugly pattern of repeated attempts by some members of the Board of Education to make decisions destructive to the school system, to challenge the Superintendent's authority and undermine his ability to provide instructional leadership. (September 4, 1974)
- "Annette Temin, One Woman's Contribution To Public Education" - Founded and led Citizens Committee on Public Education, chaired its reading committee; started Language Arts Reading Camps and was prime mover of today's huge volunteer program. (Oct. 21, 1974)

- "Science In The Philadelphia Public Schools" - Why today's students need a strong background in science. The need for science teaching to be revitalized. Many elementary school children exposed to science this year for first time. Why all students should study physics. (Nov. 22, 1974)
- "Student Records" - Present record keeping system violates students' right to privacy, labels and stigmatizes them. New Federal law gives parents the right to inspect, review and challenge records. Most information cannot be given out without parental permission. Supplement explains how to inspect and review your child's record. (Dec. 30, 1974)
- "Floyd Logan - A Lifetime Devoted To A Cause" - Floyd Logan's 43-year fight for Black representation on the school board and school desegregation and against discrimination practiced toward students and School District employees. (Jan. 28, 1975)
- "Prekindergarten In The Philadelphia Public Schools" - Brief description of five school district programs. Necessity for strong background in early childhood education. Get Set Day Care described. (Feb. 28, 1975)
- "Reading Achievement Scores Improving" - District 4's growth in reading achievement graphed and explained. Description of the many steps taken by the school district which provide good sound reasons for expecting improved citywide performance. (March 31, 1975)
- "Index To The Oakes Newsletter" - April 1970-March 1975 (April 1975)
- "Public Education Faces Another Budget Crisis" - \$75 million budget increase largely due to contractual obligations, salary increments, reduction in maximum class size and inflation. There are ways to reduce expenditures and increase state reimbursement. Intensive advance planning required to meet 1976-77 projected deficit. (May 14, 1975)
- "Living With The Teachers' Contract" - School district at disadvantage in negotiations with Philadelphia Federation of Teachers. Present past-practice/working condition clause in contract gives PFT power to veto change. Administrators receiving inadequate support and backing. (June 18, 1975)
- "Philadelphia Must Desegregate Its Schools" - 1975 desegregation plans developed by school district and Pennsylvania Human Relations Commission described. Desegregation on a non-racially identifiable basis proposed. Many components needed for successful plan. (Sept. 16, 1975)
- "Achievement And Failure" - Evidence of improvement in basic skills cited. Staggering number of students fail course work. Arguments for and against social promotion. Ways that teachers, counselors, parents and school policies can aid in preventing failures. (Oct. 15, 1975)
- "Changes In Title I For 1975-76" - Major provisions of Consent Decree. More stringent state regulations narrow definition of children to be served, limiting number. School district forced to conform to law. (Nov. 20, 1975)
- "Follow Through" - A Federally funded research program, kindergarten through third grade, to determine most effective educational approaches to low income children. Description of Behavior Analysis and Bank Street models. Program provides avenues for parent participation and has benefited children in many ways. (Jan. 13, 1976)
- "Selection, Rating And Dismissal Of Teachers" - Procedure for selecting teachers not rigorous enough. Serious problem caused by school dis-

trict's unwillingness to deny tenure to or dismiss teachers judged unsatisfactory. (Feb. 12, 1976)

"Contract Clauses Need Modifying" - Principals' authority eroded by three contract clauses. Past Practice clause should be limited. Responsibilities of vice principals should be expanded. (March 11, 1976)

"Excellent People And Programs Found In Many Schools" - The classrooms of three excellent teachers. Science with a very special teacher. Mitigating a community human relations problem with after school activities. (April 23, 1976)

"The School Budget For 1976-77" - Balancing the budget requires a combination of more revenue from the city and state, cuts in the budget and great restraint in contract demands. (May 19, 1976)

"Mathematics" - Instruction greatly improved by reorganized, highly systematic, sequential, step-by-step curriculum guide, and more effective, diversified programs. Two serious problems remain - shortage of mathematics teachers and inadequate number of mathematics specialists to work with classroom teachers and students. (June 17, 1976)

"The Budget Gap Must Be Narrowed" - Board of Education should have exerted more control and influence over expenditures and revenue. Accumulated savings would have been from \$14-\$19 million by now. Underassessment of properties results in substantial revenue loss. (Sept. 27, 1976)

"Who Is Responsible When They Don't Learn?" - Society must share responsibility with the schools. Some ways to improve students' motivation and attendance. (Oct. 25, 1976)

"Discipline - What Should The Goals Be?" - Climate for learning, safety for staff and students, responsible behavior with self-control and mutual respect, and a healthy attitude toward authority. Sound discipline attainable in schools run on democratic principles, but not in permissive or oppressive settings. Suspensions should be limited. (Nov. 29, 1976)

"Desegregation And The Board Of Education" - Why Human Relations Commission rejected August 1976 School District desegregation plan. Voluntary plan concept has already failed in Philadelphia. Board of Education has no commitment to school integration. Importance of desegregation explained. (Jan. 17, 1977)

"The Academically Talented Program - Costly And Unfair" - Criteria for entry explained. Program inequitable, serves greater proportion of children from middle and high income families than low. Present high costs will escalate further if due process procedure and/or specially prescribed individual programs implemented. (Feb. 17, 1977)

"Writing - Students Should Do More Of It" - Why writing is an essential skill. Students can only learn to express themselves well and grammatically if they write frequently. Work that is posted or published should be error free. (March 18, 1977)

"Index To The Oakes Newsletter" - April 1970 - March 1977 (April 22, 1977)

"The 1977 Fiscal Crisis" - A short year budget leads to a \$67 million deficit. Budget growth caused mainly by salary increases and more employees. Special education and vocational education not fully funded by state. Ways to cut the budget without reducing services to children. (May 11, 1977)

- "Of Chess, Debating And The Budget" - Four inner city schools are public school champions, three in chess and one in debating. The path to victory of Vaux Jr. High, U.S. National Scholastic Chess Champion, is traced. Future opportunities to develop ability and talent gravely jeopardized by slashed budget. Board of Education responsible for chaos faced by school system. (June 10, 1977)
- "A Demoralizing Summer And Still No Solution" - The \$173 million budget gap was closed by a combination of loans, cuts and new revenue. Staff reductions and restorations were made on the basis of seniority. The reinstatement of 7000 employees in the brief 8-day period before school opened led to many errors, further demoralizing the staff. Adherence to banks' 7% limit on spending would mean substantial cuts in next year's budget. (September 20, 1977)
- "Counseling - A Valuable Service" - Counselors' duties and responsibilities outlined. Examples given of their work with students. How counseling began in Philadelphia schools. Budget cuts which reduce their number will adversely affect the important and valuable service counselors render. (October 18, 1977)
- "Board And Superintendent Unfit" - Budget cuts which eliminated eight Reading Project Managers, 187 classroom reading aides and other reading personnel damaged the reading program. Board of Education and superintendent responsible for spending scarce education dollars unwisely. Philadelphia students registering significant gains on achievement tests. Description of basic skills tested by functional literacy test which 97% of seniors passed. (November 16, 1977)
- "Special Education And Public Law 94-142" - Education for All Handicapped Children Act requires appropriate placement for all handicapped children, development of individualized education program (IEP) for each one, and formal due process hearing to resolve differences between parents and school. Description of Project PEACH which seeks to help very young handicapped children. Need for more trained personnel. (January 16, 1978)
- "Absenteeism, The Budget And The Contract" - Dimensions of problem of absence. Ways to reduce excessive absences. Necessity for completing contract negotiations well before May 30. Banks' requirement of full year balanced budget with expenditure increase held to 7% adds up to massive budget cuts. (February 20, 1978)
- "Needed - Leadership And Adequate Funds" - Board of Education has not met demands of leadership and revenue has not kept up with increasing costs. Proposed solutions: Give City Council power to approve, disapprove or amend budget, elect school board, give an elected board taxing power, make the school system a department of the city. Real solution: Make present system of school board selection work and secure full state funding. (March 15, 1978)
- "Supplementary Index To The Oakes Newsletter" - 4/77-3/78 (April 1978)
- "Public Wants Higher Achievement And Lower Costs" - In response to higher achievement demand, schools developed with minimum competency standards emphasizing basic skills, discipline, and homework. Concentration on basic skills valuable only if applied in several subjects. Superintendent's recommended budget cuts listed. (May 13, 1978)
- "Alternative Programs Deserve Support" - Generally alternatives are small, informal and individualized; use varied teaching and learning styles;



and emphasize cooperation and sharing. At a time when desegregation is being stressed, financial support of these already desegregated alternatives is being reduced. (June 14, 1978)

"School System Impaired By Mayor, Board And Superintendent" - 1978 teachers' contract negotiations and disastrous settlement outlined. Class size and use of substitutes increased while 1700 teachers on layoff. Thousands of teachers reassigned twice during year to meet contract provisions and conform to Federal desegregation guidelines. Student desegregation delayed. (Sept. 21, 1978)

"School Staffs In Chaos - Superintendent Responsible" - Badly managed reassignment of 2000 teachers created chaotic personnel situation for weeks. Seriousness of staffing problem. How reassignments should be made in February. (Oct. 25, 1978)

"The Voluntary Desegregation Plan" - Importance of school desegregation. Implementation of plan delayed. Premise of plan and its flaws explained. Instructional Enrichment Centers and Academic Resource Centers described. Some positive steps taken. (Nov. 29, 1978)

"Teachers' Contract Terms Harm The Schools" - Terms led to first semester vacancies, successions of substitutes, countless staff shifts, and many hundreds of teachers reassigned in February. Job security clause gives priority to guaranteed employment not quality of instruction. Poor solution to required longer high school day. (Jan. 25, 1979)

"Vocational Education Should Be Skills Training Plus Academics" - Vocational education as taught in skills centers, comprehensive high schools and vocational-technical schools. Quality and diversity of academics offered and time devoted to skills training and academic course work varies greatly. (Feb. 23, 1979)

"Special Education - Greater Commitment Needed" - Purposes of Education for All Handicapped Children Act. New school district process for placing students in special education and reevaluating them every two years. Serious problems remain. (March 31, 1979)

"Mismanagement, Wrong Decisions And The Budget Gap" - Brief review of budget cuts and restorations over past two years. Improper costs imbedded in teachers' contract contribute to 1979-80 budget imbalance. Examples given of wasteful spending and hurtful cuts. (April 30, 1979)

"Some Of The Bright Spots" - Exemplary programs described. Edison High School's rehabilitation of abandoned housing and inclusion of adults in student body, Saul High School of Agricultural Science, mastery learning and Overbrook High School's art and music magnets. (May 31, 1979)

"As The 1979-80 School Year Begins" - Balancing 1979-80 budget. Educational program hurt by cuts in standstill budget. Job freeze in force. Schools hurt by shortage of vice-principals, counselors, non-teaching assistants, and secretaries; not enough books, materials and supplies; delayed repairs. Voluntary desegregation plan sabotaged. (Sept. 24, 1979)

"Crime And Disorder Disrupt Learning" - How students are handled by the schools and criminal justice system when they assault teachers or commit other offenses. Findings of national study on what distinguishes safe school from violent one. Counseling and alternative schools can reduce alienation. (Oct. 24, 1979)

"The Importance Of Physical Education" - Description of excellent elementary physical education program and three secondary school programs. Annual physical fitness testing consumes too much time. Newly mandated coeducational classes require program changes. (Nov. 30, 1979)

"Teacher 'Assignment' Policies Damaging" - In order of seniority, teachers select the position they prefer. They must be properly certified, but in many cases are not required to have the special knowledge or experience that the position demands. System should be modified. (Jan. 16, 1980)

"Minimum Competency Testing - Not A Solution" - When simply used to identify failing students, minimum competency testing creates serious new problems. Academic skills should be taught in context of different subjects. Philadelphia students must pass functional literacy assessment test prior to graduation. (Feb. 14, 1980)

"The Voluntary Desegregation Plan - An Update" - Current status of plan. New and arbitrary definition of desegregation. School district has undermined white parents' efforts to recruit others to send their children to predominantly black schools too. Two incidents prove importance of desegregation. Need for leadership. (March 17, 1980)

"Too Many Paid Too Much - Students And Taxpayers Suffer" - 1980-81 revenue and expenditures. School district's misspending. Many high paying administrative positions can't be justified. Other positions, such as department heads and psychologists, are outrageously costly. (April 30, 1980)

"Board And Superintendent Must Be Replaced" - Illustration of board's unwillingness and inability to grapple with the system's problems. How the 1978-80 teachers' contract, applauded by the superintendent, harmed the schools. Understatement by superintendent of Philadelphia Federation of Teachers salary increases. (May-June 1980)

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# the OAKES newsletter

An Independent Monthly Dedicated To Improving Public Education  
Helen Oakes - Author and Publisher

Vol.XII, No.2

Philadelphia, Pennsylvania

Sept./Oct. 1980

## SUPERINTENDENT A FAILURE - MUST BE REPLACED AT ONCE

Dr. Michael Marcase should not continue as superintendent of the Philadelphia public schools. Without question, his contract should not be extended beyond its present expiration date of February 1, 1981. The system's interests would best be served if he were removed from office at once. His actions on too many occasions have served to undermine the schools. To have him continue as superintendent is to stand helplessly by and watch the system continue to be damaged.

Let us examine the record, beginning with some objective measures. Dr. Marcase has played up the fact that while he has been in office achievement test scores of basic skills have shown steady growth. But this is the only area that has shown consistent improvement and even here the record is marred by the fact that reading results for the oldest students are not consistent with the rest of the system. The percentage of pupils in grades 11 and 12 reading above the national 50th percentile is less today than it was in 1974 and the percentage scoring below the 16th percentile has shown very little improvement. The dropout rate, which had been declining since 1973-74, reversed direction and started up again in 1978-79. Teacher absence, which was 7.6% in 1974-75, the year before Dr. Marcase took office, has been over 9.5% for the last three years. This is a substantial increase and means that the average number of

days of absence per teacher for the last three years has been over 18 days, out of a total of 190. Similarly, student attendance, which had stayed at 86.8% for three years in a row, dropped in 1977-78 and has been down since then. Last year, it was 84.1% which translates into 1.1 million less pupil days in school than three years earlier.

Dr. Marcase has failed in many other facets of his role as superintendent. He has not provided educational leadership. He has proven to be a very poor planner. He has shattered employee confidence in a fair basis for rewards within the system. He has been unable to bring people together inside and outside the system to resolve issues. He has failed to properly supervise his subordinates. His integrity as a superintendent and as an individual is not free of taint. He has offered no vision for the future.

A school superintendent with a budget of three-quarters of a billion dollars, 220,000 students and 22,000 employees must be a sound planner. The superintendent's total inability to plan properly can be illustrated by two recent events. On Monday, September 8, 1980, in the face of a teachers' strike, Dr. Marcase announced that all elementary schools and special education centers would be open. Many parents believed, as they had a right to, that an open school would be

staffed and would provide an appropriate first day educational experience for children. Such was not the case. All over the city, principals with one or two teachers faced large groups of children. All they could do was hold them in auditoriums, lunchrooms and gyms until they could be sent home.

Many children and their parents were deeply disappointed and frustrated. One special education youngster, after a one hour bus ride to school followed immediately by an hour's ride back, arrived home bewildered and upset. He cried for the next two hours. A six year old who happily anticipated her first day in school was crushed. When she arrived, she had no teacher and no special place to go. There was only an auditorium filled with 150 children and two adults trying to keep order. Nothing meaningful was offered that day. The superintendent must, or should, have known that this was going to happen. There was absolutely no excuse for putting children, parents, and principals through this destructive exercise.

Another example of inexcusably bad planning can be drawn from the desegregation plan. Last year, Dr. Marcase placed some new, special programs in a number of schools which recruited students from private, parochial and public schools. Assurances were given that the programs would continue for a period of time. Now, in many cases, these programs have been withdrawn or drastically cut back for lack of funds. The superintendent used Federal dollars to pay for these programs with the knowledge that they could not be depended upon for the future. Still, he made no provision for alternative funding if that became necessary. Children are being hurt. Parents are disillusioned and angry. Principals are left to explain or justify as best they can.

Part of the reason that teachers are currently out on strike over a layoff clause is because plans relative to layoffs and teacher reassignments have been horribly botched over the last three years. It began during the summer of 1977 when 10,000 employees were laid off. When 7000 were reinstated, thousands of teachers had to be reassigned in only eight days. The personnel department's records were hopelessly inaccurate and so many errors were made that an arbitrator ordered that the process be repeated and done correctly in the fall of 1978.

In September 1978, there was chaos surrounding personnel assignments again. For weeks, teachers were subject to abrupt changes in assignment. Some, experienced in one area, found themselves in situations for which they were not trained. The waste of precious human resources was incredible and incalculable. Hundreds if not thousands of staff members felt insecure, frustrated and depressed.

In February 1979, 1700 laid off teachers returned to service and 4000 teachers had to repeat the reassignment process. After all this, it is understandable that teachers have strong feelings about a no-layoff clause. If teacher layoffs had been minimized and reassignments had been made sensibly and efficiently and with consideration for the people involved, there would probably be a lot less emotion attached to this issue today.

An effective superintendent develops a reward system that is based on merit. Dr. Marcase does not operate that way. Jobs well done often go unrecognized and unappreciated. A division making an important contribution can find itself unsupported and constantly under the budget ax. One such example is the Affective Education Division which under Dr. Norman Newberg has been making a signifi-

cant contribution to this school system for the last thirteen years. Affective Education cannot be adequately described in a sentence or two, but under Dr. Newberg's leadership, the division did creative, important work. Ways were developed to teach children and relate to them that enhance the learning process. Many teachers, parents, principals and other administrators valued Affective Education training. Perhaps more than any other single office, the Affective Education Division had the greatest potential for helping Philadelphia schools to better serve the students. Dr. Newberg left the school system in August. In spite of proven value, he had to wage a constant battle to keep the program funded and the staff intact. Finally, this summer he decided he'd had enough. His leaving is a great loss to the system and another failure to be recorded on Dr. Marcase's record.

Instead of being rewarded for his proven worth to the system, Dr. Newberg, who carried all the responsibilities of a director, remained an assistant director to the end. As soon as he left, the position was upgraded to director. That is another clear demonstration of the inconsistency and lack of fairness of the rewards system under Dr. Marcase.

The search for a replacement has begun. Applicants are not required to have knowledge of Affective Education, prior experience in it, or commitment to it. There is to be no written examination for the position and no oral interview. Résumés will be submitted and the superintendent will make his choice. Clearly, the superintendent is not looking for a creative, educational leader competent in and committed to Affective Education. This leads to the conclusion that the superintendent is not looking for the best person for the job, but is reserving it for someone he wants to promote.

Using the résumé process for this position, eliminating competitive exams and consultation, serves to breed suspicion and mistrust of the basis used by the superintendent to make personnel decisions.

One of Dr. Marcase's most serious weaknesses is his inability to create harmony, to resolve important issues, and to work cooperatively with the system's various constituencies. Take, as an example, the Middle Years Alternative School (MYA) in West Philadelphia. In the spring of 1979, observers from the Council of the Great City Schools visited MYA and wrote a glowing report of the educational processes taking place there. They cited a dedicated, enthusiastic, and hardworking staff; a highly motivated student body; and strong support by parents. The superintendent appointed a principal to MYA some months later. There was no examination procedure followed, no consultation with the school family. The superintendent's choice was clearly a very poor one since there has been nothing at the school but dissension and friction since the appointment. He allowed the situation to fester until it became so poisoned that MYA parents and staff felt their only recourse was to take the matter to court. They have sued in Federal Court to remove the principal and have her replaced with someone "committed to the approved philosophy and goals of the program, supportive of open alternative education and of such temperament that incidents of screaming and harassment" will not be apt to occur. None of what the observers admired exists today. The staff has been forced out and scattered. Many of the parents who had strongly supported the school have withdrawn their children or can no longer find a meaningful way to participate and provide support. An exemplary program has been destroyed.

The destruction of MYA illus-



trates another area of Dr. Marcase's incompetence. He failed to provide proper supervision to his subordinates. He did not work with his staff to see to it that differences were resolved and friction prevented when the situation began to deteriorate eight months ago.

One of the major reasons that Superintendent Marcase cannot bring people together to work with him is that many of his decisions and actions create mistrust. The budget for 1980-81 provides a good example. It should have been a detailed blueprint of the superintendent's plan for spending. Instead, it was an uninformative compilation of requests from the various offices, plus a list of cuts identified only in very general terms. The superintendent never spelled his plans out, so everyone was left with unanswered questions. As a result, his budget aroused a great deal of suspicion.

Even Dr. Marcase's personal integrity has been open to question. School District employees constructed a porch on his summer home which, at the very least, gave an appearance of impropriety. In 1978, he joined with school board members to ram through an unannounced, long extension of his

contract. It has since been voided by the courts, but it would have taken him up to 1984 and assured him of maximum benefits upon retirement. Since a superintendent's conduct should be exemplary and his integrity beyond reproach, these incidents provide further evidence of his unfitness for his office.

Clearly, Dr. Marcase does not deserve the respect or confidence of the public or the staff of the school system. Consequently, he can't possibly provide the inspiration and educational leadership that are needed to overcome the system's complex problems.

Incredibly, in spite of his abysmal record, the school board wants to extend Dr. Marcase's contract again. Opposition from the mayor, the news media, parents and most community groups leaves them unmoved. They selected him. They continue to support him. In the light of all the evidence against Dr. Marcase this proves they are unfit for their positions. They should all be replaced. If Philadelphia is to attract a replacement for Dr. Marcase of the high calibre that is needed, there must be a new school board with new policies, values and goals.

9/16/80

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# the OAKES newsletter

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Helen Oakes - Author and Publisher

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November 7, 1980

## WAYS TO PREVENT DRUG USE BY YOUNG PEOPLE

Local and national statistics indicate that drug use and abuse by youth is widespread. Haven't we all personally witnessed young people displaying unruly, destructive behavior in the neighborhood? Haven't we seen bottles in bushes that give their mute testimony? Haven't we smelled marijuana's distinctive odor at various times and places? Don't we all have personal knowledge of the misery and tragedy that surrounds youthful substance abuse?

Drug use and abuse is a national problem. It occurs in the suburbs, the city, among whites, blacks, poor, and rich. It crosses ethnic, class, and age lines. A recent national study reported that 37% of high school seniors said they had used marijuana in the preceding month. 10% reported daily use. 20% to 25% of 14 to 17 year olds are intoxicated at least once a month and are considered problem drinkers. In a local survey, school personnel were asked when students start to experiment with or use drugs and/or alcohol. The greatest concentration of answers placed the time of first use in grades 6 or 7.

There are no easy solutions to substance abuse. Drugs do not cause the problem. Rather, the increase in their use and abuse reflects a deep malaise that lies at the core of our society. Too many people lack a central purpose to their lives. They don't find

it in their religion or in service to others. They don't take pride and find satisfaction in their work or anything else that they do. For some, money brings the "good" life, but the emptiness remains. For others, there is desperate poverty and a continuous struggle just to survive.

Young people grow up in these difficult environments. Many live in unstable, unhappy homes. Some are physically or mentally abused. Many must adjust to parents that are separated or divorced. Corruption is all around them. They can find few people to admire and model themselves after. The world seems to be filled with unmanageable problems. The ads urge them to take pills to feel better, fall asleep, relax or reduce their worries. It is understandable that, like adults, they seek a more pleasant world and try drugs or alcohol to dull the anxiety and the pain. However, the escape is only temporary and its cost to the individual and society may be great indeed.

Simply giving students information about the properties and effects of drugs doesn't discourage drug use or abuse. Scare tactics don't work either. In fact, for some, learning of the dangers only increases the excitement of drug experimentation. Current thinking at the national, state and local level is that the most effective approach to substance

use and abuse by young people is a drug prevention program with stress on helping students to learn to respect themselves, make decisions, clarify their values, take responsibility for their own actions and develop alternative activities. Philadelphia's curriculum guide for drug and alcohol education utilizes this approach. It is an excellent outline of what students should learn. However, teachers will need extensive training before they can successfully implement the guide.

There are two major drug prevention programs which operate in the Philadelphia schools. Rites of Passage serves high school students. Project PRIDE works with middle and junior high school students.

#### rites of Passage

The Rites of Passage program takes its name from the puberty rites used by primitive societies to signify the transition from childhood to adulthood. In the sharing of a marijuana cigarette or a bottle of wine, many young people use drugs and alcohol as a substitute for these primitive rites. Rites of Passage seeks to ease the transition to adulthood by providing young people with what they need to move through the difficult period of adolescence in a healthy, constructive way.

Rites of Passage provides several services. It refers some drug users and abusers for outside treatment and intensively counsels others individually or in small groups. The emphasis, however, is on the counseling groups led by drug prevention specialists or trained student leaders. In these groups of 8-12 which meet once a week for about ten weeks, the students have an opportunity to discuss the things that most concern them. They find that they are not alone in their misgivings and fears. They discover that others share a lack of confidence in

their ability to succeed. They learn how to listen and really hear another person. They find a source of strength in the group. Friendships develop and carry over to the outside. Over a period of time, members of the group gain self-confidence and a sense of self-worth. This enables them to resist peer pressure more successfully.

Role playing and exercises bring out things that students ordinarily wouldn't talk about. For example, they are asked to name three things they would save in the event of a fire. After all have given their responses, there is a discussion of what each one values and why. Each person has an opportunity to reflect on his response and to examine his values.

Rites of Passage serves a mix of those who are involved with drugs or alcohol and those who are not. Students come to the program in several ways. Some are recruited. Some are referred by teachers and other school personnel. Some hear about it and seek it out.

In each school with a Rites of Passage program, there is a core group of students which receives special training during the year. Many participate in a six week summer program. The core group plans special activities such as school dances or community service to the aged. Its members are the student leaders of the counseling sessions. The core groups demonstrate that adolescents can accept responsibility and make decisions. Their members serve as models for other students who identify with them and realize that they too can achieve and derive the same sense of satisfaction.

Students are enthusiastic about the Rites of Passage program and the adults who staff it. They say it helps them to identify and deal with their feelings, learn more about themselves, and learn how to communicate more effective-

ly. They develop a sense of belonging to their school. They learn problem solving skills, how to make decisions, and how to think through what is in their own best interests. These are all steps on the road to the major purpose of the program - freedom from dependence on chemical agents. In addition, these skills and attitudes will be meaningful and useful to the students throughout their lives. In short, it is a valuable program and it is unfortunate that its present funding permits it to reach only a fraction of those who could benefit.

### PROJECT PRIDE

Project PRIDE is a program developed by the Association for Jewish Children. It grew out of their work in the late 1960's with teenagers with drug problems. In an effort to prevent such problems from developing, a program was started to assist younger students. The program is being expanded this year and will serve students in grade 6 or 7 in sixteen middle or junior high schools spread over all districts. Project PRIDE staff works with groups of 10 to 12 students, 45 minutes a week for twelve weeks, in the areas of decision-making, peer pressure, self esteem and relationships with others. These sessions strive to help students increase their self awareness and develop the skills that will enable them to better resist use and abuse of drugs. For example, a group talks about constructive ways to deal with tension, such as listening to music or telephoning a friend. They are helped to explore the many alternatives and seek within themselves for answers. Or, each member of a group of students writes down on a card three positive characteristics of his personality. The group leader reads the cards and the students guess who wrote them. Such an exercise gets everyone thinking positively and con-

tributes to developing a sense of self-worth.

Project PRIDE staff members also work with the parents and staff in each school helping them to develop their ability to provide a more supportive, understanding atmosphere in which children can grow in a healthier way.

In my meetings with Rites of Passage students, I was distressed to hear them state that except for this one program, there are no adults in their lives with whom they can communicate. They can't talk things over with their parents or their teachers. Adults are authoritarian figures who don't hear them or respect them. Sadly, further inquiry indicates that this is the view of most teenagers. They have no adults in whom they can confide and with whom they can work to resolve their problems.

As one way to remedy this breakdown in communications, I would urge that parent groups and teacher groups similar to the students' be established on a trial basis. The parent groups could be organized around issues of concern to them, such as drug use prevention, or approaches to discipline. Parents, like students, would get support from the group. It would provide them with insights and skills useful in all aspects of their lives. Most importantly, it would enable them to improve communications with their children, thereby enhancing the quality of life for the children and themselves, and decreasing the chances of their children choosing to use or abuse drugs or alcohol.

Schools contribute to the causes of substance use and abuse in several ways. Counseling at all age levels is grossly inadequate, particularly now that counselors play such an important role in a greatly expanded special education program. Counselors have almost no time to do the counseling required to keep small problems from

becoming complex and severe. There is an urgent need to add counselors so that students can get help and avert this compounding of problems which creates stress and may contribute to drug use.

Secondary schools for the most part are large, impersonal institutions in which students feel like numbers. Most of the school staff appear to students as authority figures that are unapproachable and uncaring. Under present conditions, students seldom feel a bond with the school unless they are involved with some group activity such as student government, music, or extracurricular athletics. For most, no one seems to know or care whether or not they are in school each day, or how well they are getting along.

Schools could do a great deal to improve conditions and create a more favorable climate for learning. Feelings of isolation and alienation could be partially overcome if the home room or advisory period could be better uti-

lized. Sensitized, trained teachers could use these periods to help students develop a sense of belonging to a group that has concern for and cares about each member. Students could take responsibility for calling an absent student so that he knows he is missed. They could assist one another in finding ways to deal with problems that they have in and out of school. The class advisory could not substitute for small group counseling sessions because there are too many students and not enough time, however, it could provide a sense of belonging. Students could support each other. The teacher could serve in an advisory role and also be an advocate for the members of his/her group.

We cannot change society overnight but, if families, schools and communities worked together, we might make adolescence a more rewarding, happier time of life. That would serve to reduce the incidence of substance use and abuse.

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ON OCTOBER 14, 1980 THE PHILADELPHIA BOARD OF EDUCATION VOTED 8 to 1 to extend Superintendent Michael Marcase's contract to July 1, 1982. In so doing, they defied the mayor and paid no attention to broad editorial and community opposition to the extension. They ignored the superintendent's dismal performance record and the damage he can do in the next twenty months. The Board's vote demonstrated its contempt for public opinion and its inability to comprehend the quality of leadership the Philadelphia school system desperately needs.

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# the OAKES newsletter

\*\*\* THE 100 TH ISSUE \*\*\*

An Independent Monthly Dedicated To Improving Public Education  
Helen Oakes - Author and Publisher

Vol.XII, No.4

Philadelphia, Pennsylvania

December 9, 1980

## POTENTIAL DEBT MOUNTS AS SUPERINTENDENT SPENDS

On November 10, 1980, the School District of Philadelphia released a proposed revised budget for this year calling for the expenditure of \$777\* million or \$28 million more than the budget adopted last May. While it relies on some very questionable sources of revenue to balance its expenditures the superintendent, with perfunctory school board approval, is spending the money as if all of it were assured. When this year ends, there is a strong probability that the School District will have a substantial debt. It will also face the need for at least \$65 million in new dollars to cover next year's 10% contracted salary increases and improved benefits.

The proposed revised budget document is not clearly written. Even financial experts who are skilled at reading such documents find this one bewildering rather than enlightening.

Prompted by the new teachers' contract, the proposed revised budget calls for increased spending of \$28.3 million. To the \$22.6 million needed to cover the costs of the contract, the superintendent added another \$5.7 million. The original budget was based on

increasing class size, reducing teacher preparation time and cutting other personnel in order to reduce the payroll. The new contract brought back all of the employees represented by the Philadelphia Federation of Teachers and added some other costs.

Some of the items in the superintendent's \$5.7 million are highly questionable. He restored or added \$651,000 worth of "administrative/supportive staff." Criticism had led to some reduction last spring in the number of administrators. Most are now back. In spite of declining enrollment which should free up space, the superintendent restored \$396,000 in rental expenses and added \$300,000 to cover the rental of sites for three new high schools that are part of the desegregation program.

On top of all this, at school board meetings, even more new expenditures have been approved. Administrators have been promoted and given salary increases. \$30,000 was approved for a transportation study. Now there is a serious health threat in many schools posed by falling asbestos particles and correcting the problem has to be costly.

\* The revised budget document shows \$803 million as the total "obligations" for the 1980-81 year. \$26 million of this is a carry-over deficit from last year and is not money that will be spent this year.  
(\$803 million - \$26 million = \$777 million)

The School District is counting on total revenue in the amount of \$803 million. The \$728 million figure below represents a firm estimate, because it is based on taxes, subsidies, and other revenue sources that can be depended upon. That cannot be said for the \$75 million balance, parts of which are either doubtful or highly doubtful.

\$ 728	Best estimates of expected revenue from local, state and Federal sources
\$ 12	Bond refinancing
8	School District and city to work to obtain funds for early childhood and desegregation programs
29	Accumulation of funds for special education owed by the state for 1975-76 and following years
26	Additional funds requested for 1980-81 special education programs
<u>75</u>	
\$ 803	\$ 75

Complex financial arrangements will be required to refinance the School District's capital bonds so as to release \$12 million to the operating budget this year. Because many new schools were built about twenty years ago in response to the post-war baby boom, the payment schedule for bonds used to finance school construction is at a high point now. It will descend from \$50 million this year to less than \$10 million in 1994. By evening the payments out, paying less now and more in later years, the School District would have approximately \$12 million more this year to spend for current operating expenses.

Refinancing of the bonds depends upon many things, some of which are still under investigation. There will probably have to be legislation to set up an authority to issue bonds. The School District will have to have a balanced budget and sufficient revenue sources to meet future increased needs. These are most difficult tasks to accomplish before the end of this fiscal year!

The \$8 million for early childhood and desegregation programs is one of the more contro-

versial amounts. The School District claims that the city's managing director practically guaranteed to single-handedly produce this amount from various sources. City officials state that they did no more than offer to assist the School District in its efforts to obtain the money. So, while the programs are in place and the money is being spent, the \$8 million ball gets batted back and forth between the School District and the city.

For the past several years, the School District has anticipated getting more money from the Commonwealth for special education than it has received. To date, the state has not found the \$29 million needed to pay this obligation, but it does acknowledge the debt. There is, therefore, a reasonable chance that this money will be forthcoming some time in the near future.

The additional \$26 million requested for special education may be another story. The Philadelphia Intermediate Unit's budget for special education this year is \$91 million. However, the state allocated just under \$65 million and is requiring Philadelphia to ob-

serve this spending ceiling. This is the first year that the state has required intermediate units to stay within assigned allocations based on the money that the state has available for this purpose.

Many intermediate units across the state were adversely affected by this ruling. Legislation which did away with the ceiling for this year passed, but was vetoed by the governor, and an attempt to override the veto failed. At present the ceiling remains.

Pennsylvania has severely cut child welfare programs this fall due to lack of funds. It is, therefore, highly unlikely it will provide Philadelphia with the \$55 million needed to cover the \$29 million owed from the past plus the \$26 million for this year.

Clearly, there are very serious questions surrounding many millions of dollars in revenue. Therefore, the School District should reduce its spending accordingly.

#### INADEQUATE FUNDS, UNWISE SPENDING

There are two major reasons for the School District's money problems. It doesn't have enough money and what it does have is not being spent wisely. The School District is dependent on funds that do not grow with inflation. Five years ago, the real estate tax, which provides considerably more than half of the local tax revenue, brought in \$149 million. This year, even with a millage increase, it is expected to produce only \$187 million — just \$38 million more. Meanwhile, expenditures, which were \$530 million five years ago, are now projected to be \$777 million — \$247 million more.

In contrast, the City of Philadelphia gets a large share of its funds from the wage tax, a source of revenue which does grow with inflation. The wage tax produced \$263 million five years ago

and is expected to produce \$457 million this year — an increase of \$194 million. That jump includes an increase in rate from 3.3125% to 4.3125%, but a great deal of the increase can be attributed to wages that have increased with inflation. The School District also needs a major revenue source that increases with inflation.

The School District is also too dependent on revenue from hard pressed city taxpayers. The superintendent and Board should have joined together with other cities to conduct a sustained drive for increased state and Federal funding of the basic instructional program. City residents cannot adequately support public education and the many, essential, expensive city services. More of this burden must be shifted to the state and Federal government which can levy taxes that spread the load more equitably over more people.

The superintendent is not stretching funds to their maximum by maintaining the most important services and reducing the less essential ones. He is making no discernible effort to hold down discretionary expenditures.

There are many reasons for the public to lack confidence in the superintendent's budgets. He is not a planner. He misspends funds. He is willing to adopt unrealistic expenditure estimates or speculative revenues to balance a budget.

The superintendent has submitted no concrete long-range plans. There is no evidence that he has analyzed the School District's problems, established priorities, or is systematically attempting to develop solutions. Without such careful plans, his budgets cannot utilize the School District's scarce resources most effectively.

With the constant budget crises we face year after year, many assume there is not enough money

to provide missing essentials such as safe, properly maintained buildings and adequate counseling service. It is pretty hard to be sure, however, when the superintendent's misspending assumes its present proportions. There are categories of people (e.g., psychologists) who are grossly overpaid, many highly paid administrators whose responsibilities do not warrant their salaries, and too many programs added on top of the basic program without supporting data to prove their value and cost effectiveness. Earlier newsletters have cited other examples.

Last year's budget was an unrealistic one. The 1979-80 budget came in originally at \$730 million. It was shrunk by the superintendent to \$710 million to match the expected revenue. As the year progressed, it swelled back to \$730 million. The superintendent called for a saving of \$12 million

through a job freeze, terminations, and using fewer substitutes. This figure was challenged at the time and turned out to be much too high. Only \$3 million was saved. The estimate for utilities was equally unrealistic. The superintendent allowed little for price increases even though escalating fuel costs were front page headlines at the time. The School District's budget allowed only \$1 million for the increased cost of utilities, but in fact \$5 million was required.

The school board will hold hearings in mid-December on its 1980-81 proposed revised budget. There is good reason to lack confidence in the revenue estimates, the spending plans, and the decision makers. Therefore, the budget revision should be opposed until the superintendent and the Board acknowledge their serious financial straits and revise their spending plans downward.

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THIS IS THE 100 TH ISSUE OF THE OAKES NEWSLETTER WHICH HAS BEEN PUBLISHED CONTINUOUSLY SINCE APRIL, 1970. I would like to thank my readers and all those who have made contributions for their interest and support over the years. I am especially indebted to The Douty Foundation which enabled me to put out the first issue and has maintained their support ever since. I am grateful to The Philadelphia Foundation for their generous support which has meant so much to me. Lastly, I would like to thank Rita Oakes for helping me to make each of the 100 issues clearer and more concise than they could possibly have been without her talent and effort.

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# the OAKES newsletter

An Independent Monthly Dedicated To Improving Public Education  
Helen Oakes - Author and Publisher

Vol. XII, No. 5

Philadelphia, Pennsylvania

February 2, 1981

## SUPERINTENDENT'S ABUSE OF MERIT SYSTEM DAMAGING

Under Superintendent Michael Marcuse most appointments and promotions to high level administrative positions in the Philadelphia public schools are made without regard to merit principles or scientific methods. Lobbying by ethnic organizations is taken into consideration. Cronies are rewarded and favor is curried with those whose support the superintendent needs to stay in office. In too many cases, excellence goes unrewarded and there seems to be no logical or sound explanation for the superintendent's choices. Too often, what counts is not what you know, or your past experience, or how well you've performed on your job, but who you know, and how you rate with the superintendent.

The Educational Home Rule Charter requires the Board of Education to "adopt regulations based on merit principles and scientific methods governing all incidents of employment." Without regard to these regulations however, the superintendent may appoint about twenty-six of the administrators who serve in his cabinet and work most closely with him. In addition, he "may, with the consent of the Board, exempt not more than five per centum (5%) of the professional employees of the District."

In the last 2½ years, Superintendent Marcuse has used the 5% clause to exempt from merit selection all the secondary school

principals he has appointed and, with one exception, all the directors, assistant directors, managers and coordinators, as well as an assortment of chiefs, liasons and other high level administrators in the legal, medical, and financial departments. That may not be breaking the law, but it is certainly not observing the intent of the Charter.

The school system pays a high price for the superintendent's disregard of the merit system in his appointments to jobs carrying the highest pay and the most responsibility. A principal doing an excellent job in a small school sees a less competent person get the opening at a larger, more complex school where the compensation is higher. Trained, experienced professionals watch a person who lacks appropriate credentials and experience promoted to a position as executive director of a division. Hard-working administrators see themselves passed over as others are appointed for no sound reason to high positions. Even in cases where an excellent person is selected for a job, the lack of a competitive merit selection process casts doubt on the fairness of the choice. Because so many personnel decisions are made without benefit of objective measures of ability, knowledge, and past performance, morale is badly affected and the incentive to achieve excellence is diminished.

In order to understand some aspects of present personnel practices, it is necessary to look back at the history of appointments and promotions over the last twenty years and to consider other circumstances and events of the period. During the late 1950's and all through the 1960's, Philadelphia blacks and civil rights groups were battling discrimination and fighting to desegregate the schools. There were numerous reports and surveys documenting the fact that black children were receiving an inferior education. Most black students were in predominantly black schools which had the most part-time classes, the greatest overcrowding, the most classes without regularly appointed teachers, and the greatest inadequacies of textbooks, supplies and equipment. Blacks attended school in the oldest and most run-down buildings. Not surprisingly, black youngsters had the highest dropout rates and the lowest achievement levels. There was great agitation from many sources for change and improvement.

Black educators were subjected to discrimination too. An October 1965 survey of the racial composition of the staff of the school district made the picture very clear. Although 57% of the students in the Philadelphia schools were black, and 39% of the elementary school teachers were, only 14% of the senior high school teachers were black. There was in all of the senior and technical high schools a grand total of three blacks filling the 189 existing positions of principal, vice principal and department head. Only 4% of the directors and assistant directors in the central administration were black.

In the early 1960's, there was no formal procedure for filling administrative positions beyond elementary school principal. The superintendent consulted with his

top associates and made the appointments. The administrative staff was not even notified that the openings existed.

There has always been a strange inconsistency between the selection of elementary school and secondary school principals. With very few exceptions, elementary school principals have always been appointed through a merit system and secondary school principals have not. Elementary school principals take a written and an oral examination and are placed on an eligibility list. There is no similar process for secondary principals.

#### COMMITTEE RECOMMENDATIONS

A Special Committee on Nondiscrimination, created by the Board of Education in 1963 to develop policy and guidelines for fostering integration of pupils and staff, recommended that vacancies in administrative positions be announced. Later, that was written into the Philadelphia Association of School Administrators' contract. The Special Committee also recommended that all junior and senior high school principals and assistant directors should be selected through the same examination process then in use for elementary school principals, supervisors and secondary school vice principals. That policy was adopted by the Board of Education on May 12, 1964.

In December 1965, when a new school board came into office, it was under great pressure to increase the number of black administrators in high positions and to increase black staff members of all kinds at the senior high school and technical high school levels. On March 21, 1966, this new Board of Education passed a resolution authorizing the superintendent "to appoint and promote persons, without examination," to all administrative positions from vice principal and supervisor up.



The mandatory use of merit principles was set aside in the belief that to place badly needed blacks in the secondary schools and top administrative posts where they were grossly underrepresented would require greater flexibility than could be expected from the traditional formal examination process which may have had traces of discrimination inherent in it.

About a year after taking office, the new Board of Education selected Dr. Mark Shedd as the new superintendent. He picked up the reins in September 1967 from Dr. C. Taylor Whittier. Both Drs. Whittier and Shedd worked to place more blacks where they were needed and lacking. Black educators had been subject to flagrant discrimination so there was good reason to take special steps to overcome past injustices. Also, it was very important for black students to see black women and men among the top administrators in their schools and in central administration. They needed and deserved role models as well as people to whom they could better relate. Between 1965 and 1970, progress was made. By the fall of 1970, blacks represented 21% of the senior high principals, 7% of the senior high department heads and 20% of the School District's directors and assistant directors.

#### ORGANIZATIONS FORMED

The appointment of blacks to these previously denied positions caused some other employees to feel threatened. Whites began to subdivide themselves into various ethnic groups. The Italian-Americans responded first by organizing themselves into the Columbus Forum in 1967. A year or so later, after 380 central administrative positions were cut, Jewish educators formed Educators Lodge, B'nai B'rith. The Irish-Americans organized themselves into the Philadelphia Emerald Soci-

ety Educational Committee in 1974.

These newly formed ethnic groups had been preceded by the Educators' Roundtable formed in 1957, an organization of mostly professional black men. In the late 1960's The Black Educational Forum was formed. With its membership open to black women and men in every job category, its goal was to merge all existing black groups into one so that black strength and power could be increased. In the mid-1970's, the Black Women's Educational Alliance was founded to address the particular problems and concerns of black women.

These six organizations, representing various ethnic employee constituencies, focus their energies to varying degrees on gaining promotions for their members. They are joined by a seventh organization, Women In Education, which represents women in the school system. Almost all of the seven assist their members in preparing for promotion through seminars devoted to how to prepare résumés, write exams, and effectively answer oral examination questions. All provide their members with opportunities to establish friendships and build networks of support. Some have extensive programs with educational, cultural or charitable aspects. Some have lobbied extensively for appointments and promotions for their members, and others have worked hard to get a merit selection system for these administrative positions in keeping with the Educational Home Rule Charter.

It is very unfortunate that the correction of past inequities led to lobbying activities by some ethnic organizations which foster the concept that there should be some kind of numerical distribution of jobs based on ethnic background. There is no reason whatsoever for accepting a view that the various white ethnic groups

deserve appointments and promotions by some proportional formula. Whites and blacks should be appointed and promoted when the individual candidate is the best one for the job. Students, be they black or white, need teachers and administrators representing both races and both sexes too. No further subdivision is proper. Whether a white administrator is of Irish or Italian descent or comes from a Catholic, Jewish, or Protestant background is completely irrelevant. To the extent that ethnic organizations have exerted pressure to advance their own, they have had a deleterious effect on the school system. They have been divisive as they have pitted one ethnic group against another and have served to further erode the concept of merit appointments.

For his part, Superintendent Marcuse has fostered the concept that there should be some kind of numerical distribution of jobs among ethnic groups and given impetus to a destructive deepening of divisions in the School District staff. The superintendent's handling of appointments and promotions is having an extremely

destructive influence on the school system. Excellence and effort, which are requirements for making the schools better educational institutions, go unrewarded. At the same time, knowing the right people, advancing in the right organizations, and supporting the superintendent, all of which contribute nothing to the advancement of education for students, lead to rewards from the system.

Superintendent Marcuse came into office in July 1975. He followed Dr. Matthew Costanzo who had utilized a merit system for many of his appointments to assistant director and director. It was an opportune time to extend the merit system to almost all positions. Superintendent Marcuse has done just the opposite and the Board of Education went right along with him as they approved one exemption from the merit system after another. This is yet another example of the destructiveness of the present superintendent and Board of Education and another reason to call for their immediate removal from office.

1/28/81

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REMINDER. 1980 School-By-School Statistical Analysis @ \$4.50. Earlier editions (1975 thru 1979) available for \$1.00 each with 1980 edition.

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# the OAKES newsletter

An Independent Monthly Dedicated To Improving Public Education  
Helen Oakes - Author and Publisher

Vol.XII, No.6

Philadelphia, Pennsylvania

March 3, 1981

## SPECIAL EDUCATION AND THE BUDGET GAP

A dark and heavy fiscal cloud hangs over the schools. The budget of the Philadelphia School District is out of balance by \$68 million. The superintendent and the Board of Education would have us believe that the current crisis is not their fault. They claim that the state's unwillingness to pay what it owes for special education is responsible for two-thirds of the School District's \$68 million gap.

Because of this claim and because the budget for special education is over \$90 million, it seemed important to learn more about special education and what it costs. My research convinced me that the School District offers programs and services which greatly benefit thousands of youngsters. Some are very expensive, but essential. However, it also became clear that some costs are much too high and should be reduced.

In the last five years, special education has greatly expanded from about 17,000 students served in 1976 to 29,000 today. It serves those with handicaps ranging from profound mental retardation, to physical handicaps, to mild or severe learning disabilities. There are 6500 students who receive speech/language instruction a few times a week and 4700 students in the mentally gifted program. In the last five years, the School District has increased its service to the emotionally

disturbed by about four times and its service to the learning disabled by at least eight times.

Because special education has grown and expanded so much over the last few years, each of the seven districts in the city now has a large staff. Depending on the need, each district has about 15 psychologists, several psychiatric and medical consultants, 15-20 instructional advisors, 4-9 physical/occupational therapists, and 25-30 teachers of speech and language. Depending on a school's needs, they serve part-time or full time. This year the programs are administered locally by a special education administrator and supervisory personnel who have been added to the district superintendent's staff.

In preparation for this newsletter, I visited two elementary and two secondary schools which serve both handicapped and regular children. Undoubtedly, the quality of service available to special education children, just as to regular students, varies tremendously. My visits could only give me a sense of what is being done, but I saw some things which impressed me deeply.

I saw some children in a class of moderately mentally retarded who were putting a list of words in alphabetical order. The words were those needed to function in society such as stop, exit, danger, and flammable. The words were in

correct order, written neatly and clearly on the page. Some of these students will be able to use this alphabetizing skill to consult a department store directory, or find a product or service in the yellow pages. Seeing these young people who have such severe handicaps learning these skills makes one realize the magnitude of the potential of some of them.

I observed a class of twelve elementary school "learning disabled" children and watched a skillful teacher work with them on something approaching an individual basis. His goal is to send children back to their regular classes, once their deficiencies have been met and conquered. One of his biggest hurdles is to overcome the block to learning caused by his students' past, repeated experiences of failure. His lessons are designed to assure that each child will find success at each step along the way to building his reading and mathematics skills to where they should be.

I saw profoundly impaired youngsters respond to a music teacher's love and the sound and rhythm of her music. I saw teachers working with young people who are learning signs to indicate basic needs like thirst and hunger because they cannot communicate with words. I saw a young man slowly and painfully learning to sort red, white and blue pieces of paper into the appropriate colored baskets. A severely retarded young man who also suffers from cerebral palsy came to school last year with clenched fists that had to be worked on for minutes at a time to get them open. Now he vacuums and sponges the tables clean because both activities require an open palm and help him maintain flexibility. The teachers and aides in these classes work hard for small victories. They invest great amounts of time, energy, patience, and ingenuity in their struggle to give students the ability to

assume greater responsibility for their own care and become more independent. Each step develops the potential of that person a little more and in the long run means a better quality of life for the individual and less expense for society.

#### STATE REIMBURSEMENT

The School District is trying to get an additional \$45 million from the Commonwealth (\$27 million for this year, \$18 million still owed from prior years) as reimbursement for its current and past special education programs. The state maintains that it can cover these costs only up to the amounts appropriated by the General Assembly. The dispute has been taken to court, but there are other issues involved.

The School District can't limit its spending to some arbitrary figure. There is a Federal law requiring all school districts to serve every handicapped child and Federal judges have ordered the School District to carry out this mandate with quality programs that are expensive.

While the School District must provide these services, the Pennsylvania Department of Education rightfully questions whether the School District needs as much money as it claims to perform the task. The Department feels confident that the budget could be reduced.

#### SAVINGS

There are savings that should definitely be made. \$500,000 to \$1 million could be saved if the 100 psychologists on the School District's payroll were not paid \$5000 to \$10,000 more than they would receive if they did comparable work in other local agencies or institutions. Another large sum could be saved if the instructional advisors worked reasonable hours and their numbers were re-

duced. There are over 125 instructional advisors paid at least \$19,300 - \$26,700, depending on their length of service. They perform educational evaluations for teachers and then assist them in developing specific instructional programs for their children. They participate in the meetings which decide whether or not a child needs special education services and what service is appropriate. Their role is a broad one and there is much work to be done. The problem is, since their day ends with the regular school day, they work only 5½ hours if they are in an elementary school or junior high, and even less than that in a senior high school. They don't have papers to correct, nor are they required to take work home, so they cannot claim the classroom teachers' justification for a short day. While employees outside the school system, based on a generous vacation schedule and seven hour days, work 1600 hours per year, instructional advisors work less than 1100 hours per year. All School District employees should be working at least seven hours a day, in or out of school, for their salaries. This would mean better service to students, or a need for fewer employees.

In a letter to Superintendent Marcuse rejecting the special education budget as being not in accord with the state's allocation, the state suggested that the number of aides in special education classes could be substantially reduced. The superintendent tried to justify the expense by stating that aides are now part of teachers' "working conditions" and can't be removed without negotiation with the union. Full time aides are absolutely essential for some classes, but there are probably many groups of learning disabled children that could manage well with an aide half-time. This should certainly have been negoti-

ated for the contract agreed to last fall.

#### COSTS UP

The School District blames the Commonwealth in large part for its monetary crisis, but the state has problems too. As school districts have geared up to meet the demands of Federal law, special education services have expanded and costs have gone up rapidly. Up until last year, all school districts in the Commonwealth received their full payments for their special education programs, except Philadelphia which was owed \$13.9 million. Last year, the state did not have enough funds allocated to meet the needs of some other districts, as well as Philadelphia, and the amount outstanding for last year alone was \$23.3. The comparable figure for this year is \$42 million, bringing the total to \$79.2 million.

Foreseeing that there was not going to be enough money to fund special education statewide, the Pennsylvania Department of Education notified school districts last May that they would have to develop special education budgets that stayed within the constraints of estimated revenue instead of budgets based on need alone. For Philadelphia this translated into an allocation of about \$65 million to meet a \$90 million needs budget. There was no way to cut the budget that much without decimating service to youngsters. However, the superintendent made no strong efforts to reduce costs. As a result, Philadelphia continues to require a disproportionate share of state funds. Costs are much higher here than elsewhere in the state, partly for reasons previously cited — personnel who are overpaid, or work short hours, or are not absolutely essential.

Because special education budgets across the state are increasing and exceeding the money avail-

able, the Department of Education is proposing substantial changes for next year. It proposes to greatly increase class size in every category. For example, elementary school classes of learning disabled children would go from the present limits of 6-12 to 10-20. The Department proposes to limit the number of students that can be classified as special education and funded by the state to a percentage which Philadelphia already exceeds. It plans to completely disallow some positions and expenses now covered. Hearings are in progress statewide on the proposed changes. There seems little doubt that costs will have to be reduced, but the clock should not be turned back. Essential services must not be damaged.

If a reasonable solution to the schools' grave, over-all financial problem is to be found, a united effort by all segments of the community is required. This is impossible while the schools are saddled with a Board of Education that has forfeited public confidence. Six of the nine board members have expressed a reluctance to vacate their seats. If they were as concerned for the public school children as they profess to be, they would submit their resignations now.

Many of the very serious

problems facing the schools will remain when this school board and superintendent are gone. Some will be a legacy from them. They will leave us with morale at rock bottom, cronies in important positions, a desegregation plan that is expensive and unworkable, and contract clauses that are costly and inefficient. They are responsible for putting school staffs through years of stress as transfers, layoffs, closings and bankruptcy, were threatened or experienced. While they cannot be held accountable for a revenue base which does not increase with salary increases and inflation, they must answer for the misspending and the unclear budgets which undermined confidence in their statements of need.

Let no one think that the act of appointing a new school board and a new school superintendent will solve the enormous problems facing the schools. It will not, but it provides the opportunity to start the schools down a new road with leadership dedicated to the single goal of educating children. When integrity is restored to the system and the staff united, there is the potential for unleashing the drive for excellence and achievement that can turn the system around.

2/26/81

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# the OAKES newsletter

An Independent Monthly Dedicated To Improving Public Education  
Helen Oakes - Author and Publisher

Vol. XII, No. 7

Philadelphia, Pennsylvania

April 8, 1981

## SKILLS EMPHASIS DESTRUCTIVE - NEW READING PLAN NEEDED

There is a very serious threat to the intellectual development of Philadelphia's public school students. Children are not being taught to read and write in a way that challenges them to use their minds to capacity, or stimulates them to bring their whole beings to bear on the learning process. Too often, what they are taught is narrowly conceived, dull, and without much meaning to them.

Like many other school districts in the nation, Philadelphia's children and teachers have been enslaved by a systems approach to reading and writing. The same systems design that put men on the moon by coordinating the thousands of highly specialized tasks needed to accomplish the mission has been applied to the teaching of reading. It doesn't work. Completion of a series of sequential tasks does not lead to the desired goal of producing competent readers and writers.

Learning to read has been broken down into innumerable, individual skills and sub-skills that are taught, practiced, and tested. Teachers plod woodenly through the prescribed materials with their students. Students move with glazed eyes through a series of graded books, hundreds of workbook sheets, and frequent multiple-choice tests. When they are finished, even if they've achieved mastery, they can't write clearly and they haven't developed the broad, rich vocabulary that comes

with extensive reading.

In the School District's "Key Competencies" curriculum guides, skills take priority. Although literature is included, it gets squeezed out. Students don't discover from personal experience that books can provide information; insight into other people, places, and times; exciting adventure; flights of fantasy; or the beauty of poetry. Lacking a rationale for learning to read, a major portion of the student's motivation to learn, his reason for coming to school, and the value of his being there is lost.

Teachers feel compelled to teach skills because the required tests measure the acquisition of skills. The results are very important to both students and teachers because that is how they are judged. It is very clear that the School District values skills teaching above all else.

There is an alternative to this dreary, mechanical approach to teaching reading and writing. In use in a few places in Philadelphia and in many other parts of the state, the Pennsylvania Comprehensive Reading/Communication Arts Plan (PCRP) is an excellent plan. It was developed for the Pennsylvania Department of Education by Dr. Morton Botel of the University of Pennsylvania. The Plan is rooted in the concept that an essential school goal is to make children into lifelong read-

ers and writers. Its curriculum for reading, writing, speaking and listening is based on four experiences which students must have to develop their art and skill with language to the maximum extent. These critical experiences are responding to literature which is heard, read, visualized or dramatized; sustained silent reading; oral and written composing; and investigating and mastering language patterns.

The PCRP requires teachers to have priorities that differ sharply from those of most teachers involved in Philadelphia's reading program. Instead of concentrating on teaching skills to the exclusion of almost all else, the PCRP views skills as only part of what must be taught. Its much broader approach focuses on getting children to hear and read fine literature, to enjoy reading on their own, and to compose their thoughts orally and in writing. PCRP teachers strive to get children deeply involved in their learning by sparking interest, stimulating thought and engaging feelings. They want students to see reading as something that can be rewarding, stimulating, exciting and fun. They want them to view writing as a means of communicating ideas or thoughts that are important to them. They want to create a classroom atmosphere in which students can feel secure as they are encouraged to develop their ability to express their thoughts. When successfully executed, the PCRP means that the whole student, with his thoughts, feelings, and opinions, becomes involved in the learning process.

#### RESPONDING TO LITERATURE

The PCRP places a heavy stress on exposing students to literature. A very important part of the daily routine is reading or hearing a literary selection or seeing it enacted. Students are then asked to respond to what they have seen or heard.

Teachers read to students frequently. Thus, teachers and students share in the appreciation of the clarity of an author's ideas, the beauty of his language, or the fascination of his story. This also enables students to work with material which might be too difficult for them to read the first time on their own.

Literature is introduced to students in advance and efforts are made to stir up their interest. For example, a teacher about to have his class read Langston Hughes' "Thank You Ma'am" explained that the piece is about a woman who catches a youngster after he snatches her purse. The teacher asked the students how they thought they would feel if they were the woman and what they would do when they caught the youngster. After a number of students responded, the reading began.

Taking the parts of the narrator, the woman, and the boy, students read the story aloud. The class followed along on the printed page while they heard the words read dramatically and thought about whether they would have reacted as the lady in the story did.

After a piece of literature has been presented, students respond to it through discussion, writing, or role-playing. This response encompasses how the piece makes the students feel; the factual elements of character, setting and action; what the piece means to them; and an evaluation of it. Students comprehend what they have read from these four perspectives and this stimulates and develops their thinking.

In too many regular classrooms, discussions of literature begin with factual questions requiring only short answers. The answers can be plucked from the piece with little thought. In the PCRP classroom, initial questions deal with what the student thinks and feels about the piece. Would you have done what the lady did? How would

you have felt if you were the boy? Students have differing opinions, but questions of this kind require them to respond to the literature emotionally and subjectively. Because they feel personally involved, they then pursue intellectual questions more fully.

#### SUSTAINED SILENT READING

The PCRP calls for daily Self-Selected and Sustained Silent Reading. It is a powerful experience to be in a classroom where the children, the teacher, and the aide are reading to themselves. It is still more impressive when the principal rings a chime over the public address system to signal the beginning of Sustained Silent Reading for the whole school.

There are good reasons for giving time to Sustained Silent Reading. It demonstrates that the principal and the staff believe it is important for students to read material of their own choice. It forces school staffs to provide opportunities and ways for students to get reading material that they want to read and will enjoy. It encourages the building of classroom libraries and greater use of the school and public libraries. It aids in the formation of a lifetime commitment to reading as a way of gaining pleasure and information. It is an excellent way to help students become better readers.

#### COMPOSING: ORAL AND WRITTEN

The PCRP stresses oral and written composing. Composing is defined as the organization of thoughts and the development of ideas and feelings through oral or written language. Students must learn how to listen, speak, and write well so that they can communicate with others.

To develop facility in listening and speaking, students need practice and experience. Listening is more than just hearing sounds. It's understanding what

is said, and the ability to interpret and evaluate what is heard. The classroom must be a place in which students are helped to learn to listen, encouraged to talk, and where they are made to feel secure knowing that their informal contributions will be accepted uncritically. Teachers can create opportunities for students to speak by encouraging them to ask questions, give information, converse, debate, tell stories, give reports, and much more.

The PCRP features daily Sustained Writing. Students can only learn to write by writing. Students at all levels need the practice of writing something each day. Students choose what they will write about. Each day's entry is dated and kept in a journal or folder. Teachers read entries occasionally to provide encouragement or suggestions, but do not correct or grade them. Progress is measured by an increase in the length of daily entries and improved ability to express ideas.

In addition to Sustained Writing, the PCRP requires students to be taught to compose letters, reports, essays, poems, and stories. They learn how to edit and proofread their work. Well written pieces are polished and often displayed or published in one form or another.

Writing serves as a means of communicating ideas, but it can also assist in the learning process, because it helps students to organize subject matter and to learn it. The PCRP, therefore, calls for teachers in every subject area to require students to take notes on lectures and their reading, write reports, and answer questions in essay form.

#### INVESTIGATING LANGUAGE PATTERNS

The last of the four critical experiences of the PCRP is investigating and mastering language patterns. Students must learn the relationship of pronunciation to

spelling, how sentences are formed, and how to get meaning from words, sentences, or paragraphs. Basal readers and textbooks can be used to help students master these basic reading skills as well as necessary study skills. Although this fourth critical experience relates most closely to the way most teaching is now being done, it differs in that every effort is made to help students make direct connections with what they are learning. Whenever possible, lessons are not taught in isolation, or only from the printed page. For example, one of the lessons embedded in the story of the snatched purse was the use of quotation marks. The students read the story aloud and had to utilize the quotation marks to identify their speaking parts. They learned through this experience why and how quotation marks are used. It made a difficult form of punctuation easy to learn.

It came as a great shock to me to find Philadelphia doing such a poor and uninspired job of teaching students to read and write. Of course, there are individual teachers all over the city who are doing an excellent job. In each case, it is in spite of the system, not because of it. Here is one more

reason for the present superintendent and the school board to step down and let new leadership take over.

The Philadelphia schools must make drastic changes in what and how they teach. The Pennsylvania Comprehensive Reading Plan offers a fine, well-developed model which is already in use. In PCRP schools, the staff is called upon to be creative and imaginative. There are hundreds of ways to present literature, elicit student response, stimulate composing, and help students investigate and learn language patterns. Each teacher can utilize his own interests, skills, and resources. It is invigorating and rewarding to make a classroom into a place where students can learn with enthusiasm to listen, speak, read, and write.

Common sense tells us that Philadelphia's present narrow focus on the teaching of skills as an end in itself is wrong. Because change is always difficult, the public must create the climate for it. Whether you are a business executive, parent, legislator, senior citizen or whatever, your voice is needed to decry the present method of teaching and urge the systemwide adoption of the Pennsylvania Comprehensive Reading Plan.

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# the OAKES newsletter

An Independent Monthly Dedicated To Improving Public Education  
Helen Oakes - Author and Publisher

Vol.XII, No.8

Philadelphia, Pennsylvania

May 6, 1981

## DISTRICT HEADS FOR CHAOS - BOARD REFUSES TO RESIGN

Philadelphia's Board of Education and school superintendent continue to repeat their mistakes and failures of the past, wreaking yet another year of havoc on Philadelphia's system of public education. For the second year in a row, the superintendent failed to present a plan for spending that outlines what he believes to be the minimum essential services that must be provided along with their cost, and a proposal for securing any required additional revenue. Instead, just as he did in 1980, the superintendent presented a budget made up essentially of the existing programs and services in the School District together with what they will cost next year. The budget exceeds expected revenue by an impossibly large sum.

After some prodding, the superintendent produced a list of "potential budget reductions." Although they would have a severe impact, they add up to less than half of what would have to be cut to balance the budget. They are unsupported by any stated criteria or rationale. They reflect improper priorities by striking hard at services for children, but much less severely at administrative and supportive services. Elementary school library staffs and counselors are eliminated, while architectural and engineering services are cut less than 10%. Reading teachers are cut 50%, while informational and legisla-

tive services are cut only 15%.

Philadelphia's school budget problem stems from two sources. First, revenue does not grow as inflation and salary and benefit increases cause school costs to rise. Second, the school board and the superintendent do not spend their scarce resources wisely. This year's revenue increase covered payment of the previously contracted salary increases and increments, but little more. There was not enough left over to meet the unavoidable increases incurred for items such as Social Security, Unemployment Compensation, fuel purchases, and much more. The revenue for next year (1981-82) is projected to be only 3% higher than this year although teachers' salaries are scheduled to rise 10%, and principals and other administrators are scheduled to get a 4% cost of living lump sum payment on August 31 based on last year's salaries and the 4% increase will become a part of their base salary next year.

Education, like city and state services, must have a revenue source that produces more dollars each year. At the very least, taxes and subsidies should cover the increasing costs of maintaining ongoing essential services after decreasing enrollment has been taken into consideration. It is indefensible that revenue for public education is so inadequate that programs and services have to

be cut annually in order to balance the budget. Even if Philadelphia's schools had been managed very efficiently, available revenue would have been inadequate. However, this school system is floundering and anything but well managed — making a bad situation worse. The strong case for increased funding is undermined, because so much money is being misspent.

Many millions of dollars could have been saved each year for many years if:

- Teacher absenteeism had been reduced instead of remaining above 9.5% for the last three years. A 9.5% absence rate means that on the average in all the schools in the city, each teacher is out 18 of 190 days, or almost one day every two weeks.
- Non-fire resistant schools had been closed as enrollment dropped. This would have removed students from combustible buildings in addition to reducing costs.
- The Board had not added many previously Federally funded programs to their budget without having determined that the programs were valuable, effective, absolutely essential, and that there was money available to pay for them.
- Rentals had been reduced by utilizing existing space in schools.
- Department heads had been eliminated, or required to teach four out of five periods daily instead of one or two.
- Psychologists had been paid at prevailing rates instead of \$5,000 to \$10,000 more.
- Some central administrators had not received exorbitantly high salaries for jobs that do not merit them.
- The School District's contribution to the Philadelphia Federation of Teachers' Health and Welfare Fund had been limited to actual costs. The surplus in the Fund was so great (\$6 million, or possibly much more) that it offered cash payments to PFT members, up to \$150 for 1980. Members had only to prove that they had medical expenses or health insurance premiums of at least \$150. Another \$150 is available for 1981.

#### 1981-82 Budget Gap

	—	millions	—
Deficit from 1979-80	(\$ 25)		
Deficit from 1980-81	(\$ 46)		
	(\$ 71)	(\$ 71)	
Expenditures for 1981-82	\$ 903		
Revenue for 1981-82	\$ 750		
Deficit (Spending exceeds revenue)	(\$ 153)	(\$ 153)	
Budget Gap 1981-82		(\$ 224)	

On March 27, 1981, Superintendent Michael Marcase projected a gap between available revenue and expenditures for next year of \$224 million! This gap in the 1981-82 budget results from a deficit that will have reached \$71 million by the end of this year, and a projected level of



spending for next year that exceeds revenue by \$153. Although the superintendent can blame \$51 million of the \$71 million deficit he will face at the end of this school year on the state's lack of proper reimbursement for special education, he must take responsibility for the \$20 million balance, particularly since he has absolutely refused to make most of the cuts that have been recommended over and over again for years.

Next year's \$153 million gap results from the gap in this year's budget increased by a growth in expenditures for next year. The increase is attributable in part to \$58 million in contract guaranteed salary increases and salary increments, \$22 million for employee benefits, and \$5 million for inflationary increases in the cost of fuel and utilities.

#### THE 1977 BUDGET GAP

It is very clear that the Philadelphia schools face a financial crisis this year of greater and more serious proportions than in the past. It is true that about this time in 1977 the School District had a budget gap of \$173 million. However, the problem was resolved then in some ways that affect the options that are available today. \$80 million of the \$173 million was borrowed. \$50 million was in bank loans which still are being paid off. \$30 million was a payment due the state which was converted into a loan payable over ten years which has several more years to go. \$20 million came in revenue from a new subsidy formula. \$24 million came in the form of a grant from the city. The need for the remaining \$49 million was eliminated by cutting the budget. It seems highly unlikely that today, under the circumstances, the banks or the state would provide additional loans. With serious financial problems of its own, the city does

not have funds that it can turn over to the schools. In 1977, the gap was \$50 million smaller and the options were greater. Today, prospects for a solution are grim indeed.

Yet, incredibly, as late as last November 10th, the superintendent was still maintaining that "we currently are operating on a balanced budget for 1980-81, as we have for several years now." Those were his words in a letter to administrators relating to the preparation of their budgets. It wasn't until January that the superintendent finally admitted that this year's budget is out of balance by \$71 million.

The superintendent and the Board of Education appear to be living in their own dream world where the fiscal crisis does not affect their day to day decisions. Less than a month ago, the superintendent urged the Board to approve a New York consultant's fee saying, "We have funds available to pay for this." Only last week, the superintendent was urging the Board to accept a large farm in the Northeast as a gift, although there would be upkeep, improvements, and other expenses. It is impossible to understand how the school board and superintendent can even consider adding costs, at a time when they face a \$71 million deficit and there is not enough cash to meet the payroll. Under these conditions, there cannot possibly be "funds available" to cover a consultant's fee. Every additional dollar that the superintendent spends is another dollar that must be cut from some existing program in the future.

The Philadelphia schools face a grave financial problem that impacts on the education of 213,000 students, the futures of 28,000 employees, and the life of a city. There are deadlines coming in a matter of weeks. The Board of Education must adopt a balanced bud-

get by the end of May, and City Council must meet the same deadline for passing a tax package for the schools. If there are to be layoffs, the individuals involved must be notified by June 30th to meet contract requirements.

At this critical time, Philadelphia is saddled with a Board of Education and a superintendent who are ineffective. Neither the superintendent nor the Board of Education has a plan for dealing with this situation. Their stewardship of the schools warrants no confidence and receives none. Their refusal to step down has jeopardized the future of public education in this city and made it impossible to use the last several months to plan in an orderly way to meet this financial crisis.

Admittedly, there is no good solution to this fiscal dilemma. Even if reasonable amounts of new funds are found, the budget will have to be reduced and there is no way to do this without violating contracts, regulations, and/or state and court mandates. For example, in signing the September 1980 to August 1982 Philadelphia Federation of Teachers' contract, the School District agreed to pay \$53 million in salary and benefit increases next year and to lay off

PFT members only for, and in proportion to, declining enrollment. For their part, teachers agreed to postpone salary increases until September 1981 and to accept the layoff clause. Their 21-day strike cost them nine days pay, a loss that translated into \$600 - \$1200 for most. Having made these sacrifices to achieve this agreement, it would seem unfair to reopen the contract now. However, how can the contract be honored in toto in the face of a deficit of \$224 million?

The schools are moving toward a precipice and a fall into the chaos of bankruptcy, or staggering cuts. A financial problem of this dimension demands that all parties work diligently and cooperatively toward a solution. That is impossible while the school decision makers are people who are unable to lead and in whom the mayor and the citizens of Philadelphia have no confidence. Still, six Board members and the superintendent have refused the mayor's long-standing request to resign. There is no longer enough time to develop what at least could have been the best possible solution under the circumstances. It is sad that the obstinateness of so few can do so much irreparable harm to so many.

5/3/81

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