

THE PANASONIC FOUNDATION

AND SCHOOL REFORM



20 YEARS OF
CORPORATE
COMMITMENT

by Robert A. Kronley



FROM THE EXECUTIVE DIRECTOR

JULY 2004 is the 20th anniversary of the Panasonic Foundation’s incorporation. To mark the event, we decided to issue a publication that would both celebrate and “account for” our efforts in education reform over the past two decades.

BECAUSE OF his deep and broad knowledge of education philanthropy, we asked Robert A. Kronley to go through our archives; speak with current and former consultants, staff, and educators with whom we have worked; and distill the information into a narrative that would capture what he felt was most notable about the Foundation. Robert has done a masterful job, and I would like to thank him and his associate, Claire Handley.

I AM ALSO most grateful to our colleagues in the Foundation’s partner districts and in the fields of school reform and education philanthropy who generously agreed to be interviewed for and quoted in this volume. Space constraints alone limited our ability to include more than the comments of a few.

ADDITIONALLY, I would like to thank Leslie Graitcer, formerly of the BellSouth Foundation,

and Betty P. Rauch and Mimi Grinker of R/G Communications for their invaluable contributions to the conceptualization and realization of this publication; Cynthia Cliff of Janin/Cliff Design and Mick Wiggins for their artistic and technical virtuosity and their patient tolerance for “one more tweak”; and Kathleen L. Florio, who is so much more than a copy editor.

AND FINALLY, the Foundation’s work, including this publication, would not have been possible without the vision and trust of the Matsushita/Panasonic corporation, and especially of Mr. Masaharu Matsushita; the inspiring and nurturing leadership of the Foundation’s board of directors; the dedication and hard work of our senior consultants and our staff; and the many, many practitioners and thinkers in education, school reform, and education philanthropy from whom we have learned so much. To all of the above, my deepest appreciation.

Sophie Sa

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INTRODUCTION

THE PANASONIC FOUNDATION was created in 1984 by the Matsushita Electric Corporation of America—best known in the United States as Panasonic—as a gesture of thanks to the United States and as a way of contributing to American society.

FROM ITS BEGINNING, the Foundation’s mission has been to improve student learning, especially the learning of those who traditionally have not been well served by this nation’s schools. Although its commitment has remained steadfast, the Foundation’s approach has changed as its own learning has grown. It has evolved from a traditional grant-making organization to one that does not make grants, but instead engages in hands-on partnerships with school systems, focusing on building the capacity of these systems to develop and implement their own reform efforts.

TODAY THE PANASONIC FOUNDATION is recognized as a leader in education reform with distinctive characteristics that include the following:

- A whole-system approach that fosters system-level and systemwide changes to improve learning in all schools for all students
- A definition of “school system” that includes the central administration, the school board, the teachers union, and the principals association; and an insistence on the active participation and collaboration of these four key internal stakeholder groups
- Use of experts—its senior consultants and staff—to provide ongoing assistance to Partner districts
- Investment in long-term partnerships with school districts, some of which have extended more than 10 years

- **JULY**—Matsushita Electric Corporation of America (MECA) establishes the Matsushita Foundation, Inc. (The name is changed in 1990.)
- **AUGUST**—Raymond A. Gates (Senior Advisor, MECA), Robert S. Ingersoll (former U.S. Ambassador to Japan), Martin Meyerson (President Emeritus, University of Pennsylvania), Masayuki (Mel) Nakao, and Ira Perlman are appointed to the Board, with Ingersoll as Chair; Perlman (VP, General Administration, MECA) as President; Nakao (VP, MECA Planning) as Vice President; Seth Waller (VP and General Counsel, MECA) as Secretary; and Samuel M. Watson (General Manager of Finance, MECA) as Treasurer.

“We need new language now; we are creating a new field of these foundations that are quasi-grantmakers and quasi-support organization places.

Panasonic was the first.”

—Gloria Frazier, *Education Consultant*

IN THE 20 YEARS since its inception, the Foundation has partnered with 27 school districts, five state departments of education, and a consortium of two dozen rural districts in New Mexico. The breadth, depth, and duration of these Partnerships sometimes belie the Foundation’s lean budget. The Foundation’s endowment is now \$20 million and its annual expenditures total less than \$2 million—amounts that are overshadowed by the resources of other funders who have similarly supported education reform. Yet the \$25 million that it has spent since its founding has yielded results that are significantly greater than its investment.

THE FOUNDATION’S EFFORTS have had major impacts on its Partners. Among other things, school systems have developed student learning standards and assessment measures, adopted new approaches to professional development, reorganized their central offices, improved relationships between district administration and unions, and changed school board practices that interfered with teaching and learning. In some districts, new or enhanced adult capacity is

beginning to result in improved test scores. Additionally, all Partnership sites have developed or redoubled their dedication to equity; they have made the Foundation’s watchwords, “All means all,” their own.

THE PANASONIC FOUNDATION has also left an imprint on education philanthropy. Other foundations, in increasing numbers, have focused as well on reforming school *systems*, not only schools, often through long-term direct involvement in school districts. A new philanthropic field has emerged from this work, and many foundation officers speak of the influence that Panasonic has had on their thinking and of the Foundation’s significant contributions to the field.

THIS PUBLICATION marks the Panasonic Foundation’s 20th anniversary. It describes how the Foundation has maintained its dedication to the values of Matsushita by its work in education reform. It looks at the Foundation’s guiding principles, including its commitment to equity, its devotion to learning, and its emphasis on collaboration and accountability, and it presents the Foundation’s long-term view. The report also illustrates how one corporation, through its philanthropic arm, has chosen to demonstrate and fulfill its commitment to society.

Robert A. Kronley

President, Kronley & Associates

Atlanta, Georgia

July 2004

THE HEART OF THE MATTER

VALUES:



“Human beings are a society’s most precious resource.”

“Business must contribute to the community within which it operates.”

—Konosuke Matsushita, *Founder,*
Matsushita Electric Corporation

MORE THAN ANYTHING ELSE, philanthropy is about values; the act of giving expresses deeply held beliefs in distinctive ways. Individuals support causes that embody their ideals. In organized philanthropy, family foundations demonstrate fidelity to the principles that inspire their donors, private foundations articulate standards that are rooted in those of their trustees, and community foundations reflect and respond to local concerns. Company-sponsored foundations are no different; the best among them seek to foster more than goodwill.

TWO DECADES AGO, the Matsushita Electric Corporation of America, best known in the United States for its Panasonic brand name products, established the first endowed Japanese corporate foundation in this country as a way of giving something back to American society. Committed to infusing its philanthropy with integrity and quality, Matsushita has provided the Panasonic Foundation with significant autonomy, more than most corporate philanthropies. A clear example has been the membership of the Foundation’s governing board, about half of which has always consisted of individuals with no connection to the company. Board members have provided independent judgment, deep knowledge of a wide range of issues, and the determination to add value to the Foundation’s philanthropy.

IN THIS SPIRIT of autonomy and flexibility, Matsushita executives, rather than installing a company insider, authorized the Foundation board to conduct an external search for its founding executive director. The board’s choice, Sophie Sa, did not fit the then-prevailing model of corporate philanthropic leadership. Born in China, Sa had spent 11 years growing up in Japan, graduated from Wellesley College with a degree in history, and earned a doctorate in sociology and Chinese history from Harvard University. She came to the Foundation from the

- **MARCH**—Sophie Sa is appointed as the Foundation’s Executive Director.
- **JUNE**—Eileen Murphy joins the Foundation as administrative assistant.
- **SEPTEMBER**—The Foundation establishes its program areas, objectives, and guidelines; it awards its first grants to support
 - Improvement of precollegiate (K–12) education as the primary area (85% of annual program budget); and
 - Enhancement of understanding of Japanese culture and language, primarily at the undergraduate (college) level, as the secondary area (15% of annual program budget).

Social Science Research Council in New York City, where she had, among other things, staffed the Joint Committee on Contemporary China.

OTHER THAN STIPULATING that the Foundation be engaged in some aspect of education, the Corporation gave it free rein to decide what it would do and how to do it. As a result, the Foundation did not promote corporate products or business interests through its work. It did not make investments in electronics a priority. It did not give preferential treatment to Matsushita’s corporate communities. And it did not devote its resources to explaining Japanese culture to potential customers in the United States. Instead, the Panasonic Foundation sought to extend paramount Matsushita values—that people are our most precious natural resource and that businesses must contribute to the larger community within which they operate—by dedicating itself to the enhancement and improvement of public elementary and secondary education in the United States.

Over time, the Foundation has developed and augmented its core values. Although it has never formally disseminated a “list of values,” staff, consultants, partners, and observers of its work agree that what the Panasonic Foundation most values are the following:

- A quality education for all students
- Equity, justice, and fairness
- Excellence
- Integrity
- Autonomy and independence of thought
- Collaboration
- Innovation
- Learning
- Candor
- Accountability

EQUITY AND EXCELLENCE: “ALL MEANS ALL”

IT WOULD BE DIFFICULT to assign a degree of importance to the various values that guide the Foundation’s work; each is integral to its belief and practice. However, its embrace of two values—equity and excellence—runs through and is demonstrated by its commitment to the remaining values. Its dedication to equity and excellence has led the Foundation to focus on the education of low-income and minority students, who historically have been least well served by our schools. The Panasonic Foundation’s staff and consultants early on became missionaries for the belief that every child, properly nurtured, is a budding success who can blossom and fulfill his or her potential. A central part of the Foundation’s driving passion for excellence is its commitment to ensure that every child, regardless of circumstances, achieves at the highest level. For the Panasonic Foundation, excellence cannot exist without equity.

IT WAS THIS PASSION, too, that led Panasonic to develop a pioneering approach to education philanthropy—one in which the Foundation worked directly with school systems to help bring about fundamental transformation of how these systems operated—so that all students in all their schools would be successful learners.

- **MARCH**—The Foundation refines and refocuses its precollegiate program guidelines to emphasize the following:
 - Significant and long-term whole-school improvement, especially in teaching and learning;
 - A more proactive approach to actively seek out schools and districts to support over a sufficiently long period of time;
 - Improvement of public K–12 education, with preference for schools and districts serving high percentages of disadvantaged youth; and
 - Partnership with school districts committed to significant and fundamental improvement.

Leaders in the Foundation’s Partnership districts did not hesitate to embrace Panasonic’s slogan, “All means all.” Most, if not all, of them believed strongly that every child is capable of learning to high standards before they entered into a Partnership. Not many of them, however, fully realized the implications of acting to fulfill this belief; they did not recognize the scope of the challenge of getting every student to a high standard, largely because they did not have systems that provided them with meaningful or reliable information. District leaders knew certain groups of students were more at risk for failure but often did not have precise data on how many students were struggling or at what points the students were most vulnerable.

In Columbus (OH) Public Schools, where district leaders had made a commitment to ensuring that every student reached the same high level of achievement even before the district entered into a Partnership, one staff member commented that the Foundation “holds the district’s feet to the fire on the promises it’s made to the children.”

After the Foundation devoted one of its all-Partnership events to the issue of how student performance data should be collected and used, members of the Santa Fe team who attended the event called for the district to disaggregate its data to allow detailed analyses of the experiences and outcomes of different groups of students. The data revealed that Hispanic students, with few exceptions, did not reach the same level of achievement that their white peers did and that the gap between the two groups was significant. In Santa Fe, as in some other cities, ethnicity proved to have a greater effect on student achievement than family income did. These findings surprised many, even leaders from the Hispanic community. Supported by the Foundation, Santa Fe has taken the critical first steps of recognizing and acknowledging that the gap exists and is examining it closely in order to develop appropriate and tailored approaches to eliminating it.

“The conviction that every child can learn is a bone-deep value for the Foundation; they can’t have a conversation without bringing it up.”

—LaVaun Dennett, *Director of Curriculum, Instruction, and Assessment,*

Norwalk–La Mirada Unified School District

APPLIED LEARNING:

FIRST LESSONS

HAVING ESTABLISHED its focus on improving learning for students with the greatest needs, the Foundation in its first year followed a traditional philanthropic pattern—making grants in response to proposals submitted by educators and reformers for discrete projects aimed primarily at enhancing individual classrooms or schools. It quickly learned, however, that for schools to make fundamental, lasting change, the system within which schools operated also needed to change. Systems—through their structures, policies, and practices—define in large part what schools can and cannot do and too often leave visionary and dedicated principals and teachers stymied in efforts to improve learning. With this emerging understanding, Panasonic made the school system—which for the Foundation includes the teachers union no less than the central administration—its unit of change.

AT THE SAME TIME, the Foundation came to realize that strengthening instruction and improving learning depended less on giving systems money and more on providing educators at both the school and district levels needed information and hands-on assistance about how to improve. As it shifted its attention to school systems, the Foundation therefore shifted its way of working as well. It engaged districts not as grantees but as partners—collaborating closely on defining issues and strategies and providing them with expertise through its own small staff and a group of senior consultants. Although the value of capacity building is now recognized as central to any reform effort, it was a novel notion when the Foundation began its systemic reform work in the 1980s.

THE FOUNDATION'S executive director, Sophie Sa, readily acknowledges that this new

“Panasonic understood that system-level change must occur if you want successful, sustaining building-level changes ... that you must alter the power arrangements throughout the system.”

—Phillip Schlechty, *Founder, Schlechty Center for Leadership in School Reform*

- **MARCH**—The Foundation refines and refocuses its Japanese undergraduate studies program guidelines to emphasize integration of Japanese studies into core undergraduate curricula through
 - Faculty development of non-Japan specialists to acquire knowledge about Japan in their respective fields or disciplines;
 - Curriculum development to create new courses that include content about Japan; and
 - Development of teaching materials, including study and teaching guides, for nonspecialists.
- **MAY**—Partnership with Santa Fe Public Schools is launched.
- **AUGUST**—Partnership with Seattle School District is launched.

way of operating developed more out of a sense of what was *not* working—school districts as they were organized and operated, on the one hand, and the limited impact of the Foundation’s grants, on the other—rather than a clear sense of what *would* work. That major districts (Dade County, Minneapolis, Seattle, and Santa Fe) all signed on to partner with a new and unproven foundation and to adopt an emerging and untested approach within the first 12 months of what would become the “Panasonic Partnership Program” is, Sa says, an indication of how hard district leaders, too, were struggling to find answers to the seemingly intractable challenges of urban education.

AS IMPORTANT AS determining *how* it would work was the question of *whom* the Foundation would work with—finding appropriate partners. In keeping with its focus on poor and minority students, it decided to work only with medium-size to large urban districts, where the greatest numbers and concentrations of students qualifying for free or reduced-price lunch were schooled. Over time, the Foundation refined a process to determine if a school system was truly interested in pursuing the kind of fundamental and transformative reform Panasonic stood for. This involved examining materials produced by the district, making fact-finding site visits, and interviewing the system’s key leaders, middle management, classroom teachers, parents, students, and community representatives. The process also included opportunities for districts to assess their own readiness to partner with the Foundation in undertaking a change that would involve every group, department, and person in a school system.

PANASONIC’S APPROACH was further distinguished by its commitment of time. Engaging the right partners, developing a shared vision of reform, and designing and implementing

change do not happen overnight or even in a year or two. Deep change is not a linear process; its pace is both unsteady and uneven. The Foundation learned early on that making a difference required making a commitment to building long-term partnerships with school districts. Panasonic was in it for the long haul.

EMERGING LESSONS

THE CRUX OF SYSTEMIC REFORM and the basis for its sustainability is alignment—restructuring the system so that every part of the system is working in tandem toward the realization of a shared vision and common goals. In an aligned system that is student-centered, people make decisions informed by data and by a close and detailed consideration of whether the proposed action or policy contributes to progress toward reaching student learning goals. Restructuring a system is the critical and continuing step in institutionalizing reform. It replaces practices and policies born out of tradition and, often, adult convenience with practices and policies that reflect student need, best practice, and sound thinking.

“Panasonic understood the need to work on what’s invisible—the relationships, the knowledge inside people, the philosophy regarding standards—and that this is what makes the visible parts of a district have better results.”

—Marla Ucelli, *Director, District Redesign*,

Annenberg Institute for School Reform

- **JANUARY**—Partnerships are launched with San Diego City and Rochester (NY) school districts.
- **MARCH**—The Foundation decides to co-fund, with the BellSouth and the Gheens Foundations, the creation of the National Center to Support the Reinvention of Schools (now the Schlechty Center for Leadership in School Reform) under the leadership of Phillip C. Schlechty.
- **MAY**—Partnership with Dade County (FL) Public Schools is launched.
- **AUGUST**—Partnership with Minneapolis Public Schools is launched.

THE CONCEPT may seem simple and even self-evident. Yet aligning all the disparate components of a school system—independent units long accustomed to operating as isolated silos—is a challenge. It requires a thorough examination and, more often than not, a rejection of long-held beliefs, processes, and roles. In other words, it requires personal as well as institutional change. Resistance to such change is both natural and inevitable, and difficult for any organization to overcome from the inside. School systems tackling this thorny process need partners who understand the complexities of deep change and know how to help systems to reflect on their policies and practices, and in so doing, embrace the needed changes.

ONGOING LEARNING

THE FOUNDATION is such a partner. In part, this is the result of the fact that, just as it expects districts to constantly reflect on their work to ensure that the system is structured around

Each of the districts the Foundation has partnered with is unique because, although each comes to the Partnership with a commitment to change, each begins the change process at a different place. Some districts, such as Norfolk Public Schools and District School Board of Pasco County, were already developing a dynamic vision of teaching and learning that depended, in part, on breaking down bureaucratic silos and promoting collaboration within and between all groups in the districts. The challenge for these districts was creating effective strategies to realize their vision.

Other districts, no less committed to transforming teaching and to improving student

improved student learning, so, too, does the Foundation examine its own work. It constantly asks whether its assumptions about the necessary ingredients of systemic reform are accurate, as well as whether the content and form of its interactions with district staff and stakeholders are making a real difference and how they might be improved.

THIS ONGOING QUESTIONING has led to the Foundation's continued evolution and to refinements in its approach. In the first several years of the Partnership Program, the Foundation had been a strong advocate for site-based decision making. It believed that devolving authority to the school level while providing school staffs with knowledge about innovative ways to organize instruction would lead inevitably to better teaching and learning, and then, just as inevitably, this would lead to a restructuring and reculturing of the central administration to nourish and support school-level reforms—or so the theory went. The Foundation learned, though, that giving too much autonomy to

learning, are still in the early stages of creating a systemic vision of change. Before entering into the Partnership, Norwalk–La Mirada Unified School District was making little progress in improving student learning. Through the Partnership, which provided them with critical feedback, access to experts, and information on best practices, the district has seen substantial academic gains. The district is now engaged in a broad effort to align its various system components—professional development, student assessment, human resources, and so on—around the district's student learning goals to continue closing the still-wide achievement gap.

- **MARCH**—Partnerships with East Baton Rouge (LA) and Englewood (NJ) school districts are launched.
- **APRIL**—Partnership with Allentown (PA) school district is launched.
- **OCTOBER**—The Foundation holds its first annual All-Partnership Conference, in San Diego.

dysfunctional schools often only aggravated the dysfunctions, and that building the capacity of school systems required a much more focused and intentional approach.

SIMILARLY, CONSTANT REFLECTION on its work recently led the Foundation to develop a new kind of partnership that includes a third member. In these “Three-Party Collaborative Partnerships,” Panasonic, the school system, and another organization seek to extend the district’s and the Foundation’s resources—funds as well as expertise. Among other things, these new and expanded relationships will enable the Foundation to test whether the addition of a third partner can provide a more supportive environment for, as well as accelerate the pace of, reform. In the four districts where Three-Party Collaborative Partnerships have been established, the Foundation has shortened its commitment from five or more years to two, and it will be reviewing whether this is an effective way of working.

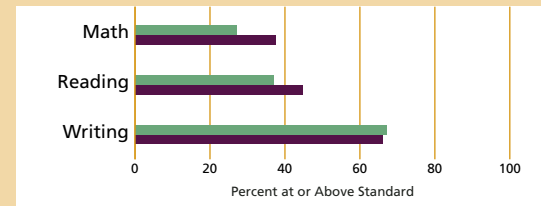
“Panasonic modeled the notion that even a foundation can learn as it goes; that you get better as you do the work, and you change the dimensions of the program as you go; that this is craft work.”

—Marc Tucker, *President, National Center on Education and the Economy*

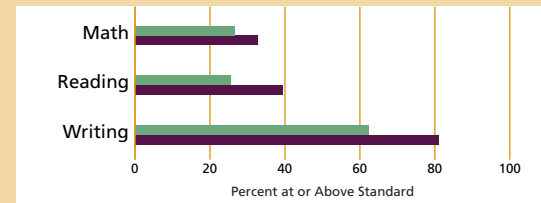
IMPROVEMENTS IN STUDENT LEARNING: Columbus Public Schools, Students Meeting Standards

■ Pre-Partnership ■ Current

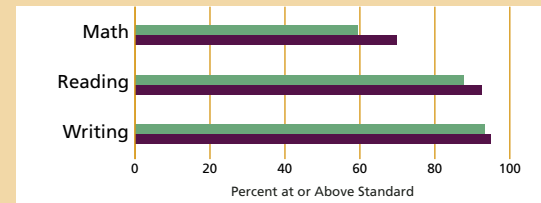
Grade 4



Grade 6



Grade 10



CONSULTANTS AT THE CORE

ENGAGED EXPERTISE:

FROM THE MOMENT it committed itself to long-term relationships with school systems, the Panasonic Foundation has maintained a very small staff and relied extensively on a cadre of outside senior consultants, whom it uses on an ongoing basis, as well as a wider network of occasional consultants to help build the capacity of its partner districts.

SA EXPLAINS that the Foundation's initial reliance on consultants stemmed from her lack of previous experience in K-12 education and school reform. As the number of Partnership sites grew, it became clear that the Foundation would simply not have the resources to engage full-time staff to do the work. Instead, it would have to rely primarily on consultants to realize its emerging vision of its role in systemic reform.

IT SHOULD NOT be surprising that in choosing consultants and in charting their responsibilities, the Foundation put values and expertise on an equal footing. It searched for individuals with deep experience and substantial knowledge in education who were also original thinkers; and it sought out individuals who were both generalists and specialists in a particular area of education. Virtually all of the senior consultants are veterans of the classroom, and most also have served in district-level administrative positions. Each brings a unique set of skills and knowledge to districts. The Foundation's senior consultants have included former union leaders, principals at various levels, superintendents and assistant superintendents, directors of curriculum and instruction, policy and governance specialists, and experts in assessment. Equally important, the consultants share the Foundation's vision and its values. In the words of the Foundation's assistant director, Scott Thompson, the consultants are "genetically encoded" with the Foundation's values—equity, excellence, integrity,



"I can't put a dollar value on what we've gotten from the consultants."

—Linda Bridges, *President, Corpus Christi American Federation of Teachers*

- **JANUARY**—Partnership with New Mexico State Department of Education is launched.
- **MARCH**—The Foundation decides to terminate its program in Japanese studies, after paying out all committed grant amounts.
- **APRIL**—The Foundation changes its name to the Panasonic Foundation, Inc.
- **MAY**—Partnership with the Minnesota Department of Education is launched.
- **NOVEMBER**—National Association of State Boards of Education completes the first external evaluation of the Partnership Program.

collaboration, risk taking, and a commitment to public education as well as to the transformation of school systems to better serve children's educational needs.

THE FOUNDATION PROVIDES its consultants with a good deal of autonomy. Each district is different, and the Foundation from the beginning has avoided a formulaic one-size-fits-all approach to its partnerships. Consultants are encouraged to fit the solution to the problem, to be creative, to rely on one another and on Foundation staff for advice, and to be prepared to start over if something does not work.

A CRITICAL ASPECT of consultants' work is the building and maintaining of trust with district personnel. To succeed in fostering reform, consultants must immerse themselves in a district. They must have deep knowledge of the issues that a district faces; the strengths and weaknesses of key individuals; and the history, internal conflicts, and competing interests that mold relationships and affect performance. This knowledge is gained only when genuine trust binds consultants and district personnel. To earn that trust, consultants must also bring expert knowledge to the work. Without that knowledge, they would have no credibility with the educators "on the ground."

YET IT IS EQUALLY critical that knowledge be complemented by skills. Consultants must find ways to surface and address disagreements while remaining neutral and serving as "honest brokers" without betraying confidences. In working with partner districts, Panasonic consultants play a number of different roles—coach, facilitator, mediator, advocate, confidant, expert, trouble-shooter, cover-provider, teacher, learner, and critical friend. Additionally, because reform is inherently dynamic, consultants must be creative and flexible to respond to ever-changing

and sometimes competing needs while helping the system to stay focused. Autonomy provides the space for application of knowledge and skills.

INTERNAL CAPACITY BUILDING: LEARNING FROM EACH OTHER

ALTHOUGH THE FOUNDATION recruits its staff and consultants on the basis of their prior expertise and experience, it also invests in their ongoing learning. In this way, the Foundation itself continuously seeks to improve its own institutional capacity. This central element of the Foundation's work is especially challenging because the Foundation's senior consultants are spread throughout the country; only the Foundation's four full-time employees work at Matsushita's corporate headquarters in Secaucus, New Jersey. The Foundation consequently has invented itself as a virtual organization that relies heavily on constant communication and a sophisticated database system that facilitates learning. Using this database, consultants report on their site visits to Partnership districts, pose questions, make comments, share experiences, and, through that process, create learning opportunities for each other and generate new knowledge.

"Rather than giving money in grants, the Panasonic Foundation gave of themselves; they made a much more personal investment. It is an effective model that other corporations could learn from."

—Diana Rigden, *Vice President, Council for*

Basic Education

- **MARCH**—Partnership with New Jersey Department of Education is launched.
- **MAY**—The Foundation publishes the first issue of *P³* (“P-cubed”), a newsletter on school-level reform.
- **FEBRUARY**—The Foundation conducts a survey of Partner superintendents regarding the effectiveness of the Partnership and the partnership approach.
- **OCTOBER**—Ann Kreidle joins the Foundation as Program Coordinator.

Partner districts appreciate the teaming of consultants. Several Partners commented on how each member of their districts’ teams of consultants “brings a different strength to the table.” Representatives from Corpus Christi described one consultant as having deep instructional knowledge, a second helped them work through team building and organizational issues, and a third made research accessible and relevant.

More generally, districts report that, without the Partnership and the continuing contributions of Panasonic consultants, the progress that the individual districts have made would not have happened, or, if gains had been made, they would not have been made as quickly or have

penetrated as deeply. Staff from Norwalk–La Mirada spoke of the Foundation’s consultants as being coaches, catalysts, sounding boards, and, when necessary, “a sharp stick in the eye.” The consultants have been confidants for district leaders grappling with difficult decisions, often reaffirming the leaders’ vision of reform and buoying their courage to pursue change even when faced with adversity. In Santa Fe, the Panasonic team has helped the school board to move closer to being a “policy board” and the district to develop a more strategic approach to professional development. As a representative from Columbus put it, the Foundation has helped the district “unlock its potential.”

PEER LEARNING is also powerfully embedded into how Panasonic organizes its work. For example, each Partner district is assigned a team of two to four individuals, usually with expertise in different areas, who take joint responsibility for working with that district. Each individual typically works on more than one team—that is, with more than one district—so as to be able to see beyond the particularities of one district. Each team has a designated “critical friend,” a senior staff member or another consultant who has a particular responsibility to critique and offer suggestions to the team. Throughout the year, Sa, Thompson, and the consultants gather for one- to three-day meetings to review each Partnership and the Partnership Program as a

whole; they also discuss how the Foundation can “work smarter,” plan all-Partnership events, and share new skills and techniques.

“The Panasonic consultants have helped us focus on priorities and goals. Prior to the Partnership, we were trying to do something for everyone. Now we’re identifying, sticking to, and investing in key priorities.”


—Ruth Reilly, *Director of Curriculum and Instructional Services, District School Board of Pasco County*

CAPACITY BUILDING:

THE MIRROR IMAGE of the Foundation's commitment to continuously extending its own knowledge is its commitment to expanding the knowledge of adults in school systems. Adult learning is at the core of the Foundation's approach to district reform, and the Foundation puts a premium on helping adults within and across school districts learn about and create a new and dynamic vision of teaching and learning and pursue the paths required to realize that vision.

IT IS IRONIC that administrators and teachers in school systems are seldom able to engage in meaningful reflection, study, and learning. Their days are so filled with duties, responsibilities, crises, and interruptions both important and trivial that most educators already work overtime. Districts and schools also face tremendous pressures to increase their scores on standardized tests and to do so "now." In this environment, carving out the time and resources for an activity that may not always be readily defined or have immediate results can be extremely difficult—and difficult to justify to district constituents.

DESPITE THESE VERY real challenges, district partners participate eagerly in the learning opportunities that Panasonic provides. Superintendents, board members, union leaders, and teachers, along with district and school-level administrators, devote significant time to meeting with Panasonic consultants during their monthly site visits, participate in day-long or multiday retreats facilitated by Foundation personnel, and attend the Foundation's Leadership Associates Program (LAP), which consists of three, three-day institutes each year. Far from considering these events to be burdensome, those who take part often speak of the Foundation's "gift of time"—time away from



"The model Panasonic offered was to pay attention not only to the players at the top but to those in the middle, too—to the teachers, the middle managers, the board, the unions. Panasonic provided vital lessons for the rest of us in doing this."

—Paul Goren, *Vice President,*
Spencer Foundation

- **MARCH**—Panasonic Foundation/Matsushita Electric receives the Conference Board's "Best in Class" award for business/education partnerships.
- **SEPTEMBER**—The Foundation receives the first of three installments of a new \$10 million contribution from Matsushita Electric Industrial (Japan).

their hectic day-to-day schedules. This is time they otherwise would not take to discuss readings, to hear expert practitioners and researchers, and, above all, to engage their colleagues in deep dialogue—facilitated by Panasonic consultants—about fundamental issues that the districts must attend to if they are to achieve “All means all.”

DISTRICTS ARE SLOWLY embracing this type of peer learning, which the Foundation has modeled and promoted. Isolation and lack of communication are typical of how individuals and departments operate in school systems. Foundation consultants, who often must serve as a conduit of information across schools and between schools and central office, encourage system leaders to make information sharing and peer learning a “habit of work” at every level of the system. In a “walk-through” process, which the Foundation has introduced to several Partnership districts, a group of central office administrators, principals, and/or teachers visit a school in the district to observe classrooms and provide feedback on that school’s strengths and weaknesses. These visits also benefit the visitors, as they learn how different schools are addressing common challenges and gain insight into their own practice. The walk-through has proven to be a powerful way for school and district staff to share knowledge and connect with their peers.

SHARED COMMITMENT, COLLABORATION, AND COMMUNICATION

AS CRITICAL as sharing information and promoting peer learning are, they are not enough to transform districts into learning organizations. Learning organizations are driven by a shared sense of purpose, a commitment to genuine

collaboration, and effective communications among all major stakeholder groups. All too often, however, the disparate parts of school systems do not share a sense of purpose; instead they see themselves as representing different constituencies with little reason to communicate, much less collaborate, with each other.

“The changes in the district (using data in decision making, focus on literacy, targeted professional development) probably wouldn’t have happened without the Foundation.”

—Marcy Litzenberg, *School Board Member,*
Santa Fe Public Schools

TO CULTIVATE a shared sense of purpose, meaningful collaboration, and effective communication across the components of school systems, the Foundation requires the central administration, the school board, the teachers union, and the principals association to commit to the Partnership—that is, to each other as well as to the Foundation—and to make good-faith efforts to work in active and ongoing collaboration. Early attempts at fundamental school system reform demonstrated to the Foundation that such reform will not succeed if even one of these four key groups is not an active participant in or is excluded from the work. Panasonic now requires the leaders of these groups to jointly sign on to a Partnership at the outset. More important, the Foundation’s continuing involvement in the Partnership depends on demonstrable evidence of ongoing collaboration by these groups.

- **JANUARY**—The first Panasonic Foundation “Occasional Roundtable” is held, on building internal and external coalitions to sustain systemic reform.
- **JANUARY**—Michael Armacost (former U.S. Ambassador to Japan) joins the Foundation Board of Directors.
- **SEPTEMBER**—The Foundation publishes the first issue of *Strategies*, an issues series for school system leaders on district-level change, in cooperation with the American Association of School Administrators.
- **NOVEMBER**—Partnerships with Lancaster (PA) and Cincinnati (OH) school districts are launched, along with a “limited partnership” with William Penn (PA) school district.

After experiencing his first full year of the Leadership Associates Program, an area superintendent in the Highline (WA) district said, “I have always been somewhat ‘implementation oriented’ rather than focusing upon organizational development. [Now] I’m a believer! I am very pleased to be addressing organizational development practices ... even though it is late in my career.”

Similarly, a principal in Atlanta observed, “The [opportunity] to push away from the district to do the work, to accelerate and sustain the work, was a must to accomplish what we have accomplished to this point. [The LAP framework] kept us focused and targeted.” Within the first few months of the Partnership with Racine Unified School District, the Foundation was able to help transform the relationship between the central administration and the teachers union from one that was at best distant to one of genuine, if not always smooth, collegiality and cooperation. In addition,

the Partnership is developing more frequent and more effective means of communication both horizontally and vertically throughout the system and between the system and the larger community. The theory is that better working relationships and communications will create an environment in which the two entities can focus not on their difference but on improving instruction and learning for children.

In the Norfolk Public Schools, the Foundation helped initiate a process through which the school board, central office administrators, principals, and teachers are looking more deeply at the challenges students confront and examining more closely their own roles and responsibilities in addressing those challenges. Additionally, nudged forward by the Foundation’s consultants, Norfolk is a district where more and more people are willing to admit that they do not have all the answers. The superintendent sees this as a culture shift that will lead the district closer to becoming a learning community.

THE COMMITMENT to collaboration embodied in the Partnership does not eliminate disagreements across groups or within groups. Foundation consultants have had to function as team- and trust-builders, liaisons, facilitators, and even mediators. They have helped districts to develop better means of communication. On occasion, the Foundation has engaged outside


experts in conflict management to work with districts. Although honest and principled disagreements between and among individuals and groups are to be expected, when conflicts are too deep-seated or when the improvement of student learning is held hostage by adult differences, the Foundation has terminated Partnerships.

ACCOUNTABILITY:

PANASONIC PARTNERSHIPS are distinguished by their pragmatism. Once a school system has demonstrated its desire to improve, the Foundation accepts the system as it finds it and moves with it toward a mutually defined goal of transformation. This journey is marked by the Foundation's willingness to make adjustments as contexts shift and needs change.

BUT PRAGMATISM and flexibility do not rule out accountability; in fact, they demand it. The Foundation's own experience over the years is a major element in assessing district performance and is especially useful at the start of a Partnership. Strong Partnerships, the Foundation has learned, initially demonstrate their potential in similar ways—through dedicated superintendents, involved school boards, staff and faculty who understand the need for and embrace opportunities to develop new capacities, unions that wish to cooperate, and a community that supports change. These are ingredients for success, and the Foundation has learned to perceive their presence and to build upon the possibilities they offer.

TROUBLED DISTRICTS are also identifiable. Like unhappy families, they show different signs of dysfunction. In some, adult issues take precedence over the needs of students. Others exhibit a pervasive disbelief in the ability of low-income and minority students to learn. Still others regard themselves as too big or too complicated to reform, while a few are simply worn out and have succumbed to a deadly cynicism about teaching and learning. The Foundation has learned much about how to recognize these districts, but, in the instances in which it has not avoided them or where the environment turns inhospitable for reform, it is quite willing to end



"The Partnership has led the district to question its goals. Why be content to reach the state's standards—getting 70 percent of students to the required performance standards? Shouldn't our focus be on getting every student to the standards?"

—John Simpson, *Superintendent,*
Norfolk Public Schools

- **OCTOBER**—The first iteration of the Panasonic Foundation Framework for School System Success is introduced.
- **OCTOBER**—Kathleen Archetti joins the Foundation as secretary.
- **NOVEMBER**—The Education Resources Group completes a four-year study and evaluation of the Partnership Program.

a relationship early. Pulling the plug becomes part of the learning process.

BEYOND THE FOUNDATION'S experience in reading signals from potential partners, accountability is pursued, from the very beginning of the Partnership, through a formal letter of intent. This document is signed by the superintendent, the heads of the teachers union and administrators association, and the president of the school board. The letter, however, merely signifies that each party wishes to enter into the Partnership. The specific focus of work and the roles and responsibilities of each party are determined in meetings between them and the Foundation's consultants. The consultants constantly monitor whether and how well this work is being carried out through monthly site visits and extensive communication between visits, both of which generate valuable qualitative data. All parties, including the Foundation, also participate in an annual review to assess the progress of the past year—in terms of both the Foundation's ability to provide needed assistance and the district's ability to implement the work—and lay out priorities for upcoming work. As Sa says, it is the effectiveness of the *Partnership* that is at issue here, not simply that of the district. In places where it felt it could no longer add value to the work of the district, the Foundation has terminated those Partnerships.

IN ADDITION to qualitative information, the Foundation also relies heavily on quantitative data to determine system progress; a central component of assuming and acting with accountability is developing and using comprehensive data systems to inform decisions. These systems are aligned with curriculum and performance standards for students, which clearly outline the

high levels of knowledge and skills that every student is to reach. Quantitative data collected and analyzed through these systems capture the successes and struggles of all students, allowing none to slip through the cracks. Foundation staff and consultants have worked to help create and use such systems, which have led to profound realizations about student learning and have been critical in guiding districts' reform plans.

JUST AS A DISTRICT establishes expectations of student learning based on curriculum and performance standards, so, too, must it establish clear expectations for the adults in the system about their responsibilities to students. The Foundation helps its partner districts to clarify these expectations for adults and for the district itself and to develop systems of accountability for them. Articulating expectations is not enough, however. All the people engaged in reform—teachers, principals, central office staff, and all other stakeholders—need guidance and support to fulfill their new and expanding responsibilities.

THE FOUNDATION believes that without this guidance and support, without meaningful learning opportunities, individuals cannot be held accountable for failing to demonstrate certain kinds of knowledge and practice. Principals, for example, cannot be evaluated as “instructional leaders” and teachers cannot be

“What has the Panasonic Foundation brought to the district? An undying focus on student achievement.”

—Gene Harris, *Superintendent*,

Columbus Public Schools

- **JANUARY**—Partnership with Broward County (FL) school district is launched.
- **MARCH**—Partnership with the Northern New Mexico Network for Education Reform, a consortium of 25 rural districts, is launched.
- **MARCH**—The Foundation publishes *The Panasonic Foundation: We're About...*
- **MAY**—Deborah Meier (principal, Mission Hill Elementary School, Boston) joins the Foundation Board of Directors.
- **JUNE**—Scott T. Thompson joins the Foundation as its first Assistant Director.
- **JUNE**—The Foundation initiates a search for new Partner districts; develops templates to guide Partnership work, including criteria and procedures for entry, engagement, disengagement, and assessment of effectiveness.

ESSENTIAL SCHOOL SYSTEM PURPOSE AND RESPONSIBILITIES

The essential purpose of school systems is to maintain a clear focus on the quality of teaching and learning in order to help all students achieve at high levels. Therefore, the essential responsibilities of a school system are to—

1. Clarify and promote the core value that all students can and will learn at high levels;
2. Ensure a culture and climate of care, commitment, collaboration, and continuous improvement;
3. Establish high learning standards and promote standards-based teaching and learning so that all students can learn at high levels;
4. Establish clear and specific performance expectations for all system personnel to support all students meeting the standards;
5. Ensure that all system personnel have the capacity to meet the performance expectations;
6. Allocate fiscal and material resources to support the system's essential purpose and core value;
7. Implement a shared-accountability system that holds students, staff, and the system itself accountable for all students meeting high standards;
8. Engage in advocacy, coalitions, and other significant relationships at the local, state, and national levels so that the system can achieve its essential purpose and core value.

assessed on how well they use new instructional strategies if the district has not provided them effective professional development in those areas. In a well-performing school system focused on student learning, the district is responsible for ensuring that needed support and resources are given to schools and school personnel, while schools are responsible for student progress toward achieving district standards. If schools are not succeeding, the district cannot simply point fingers at teachers but must also look at what it is or is not doing to help.

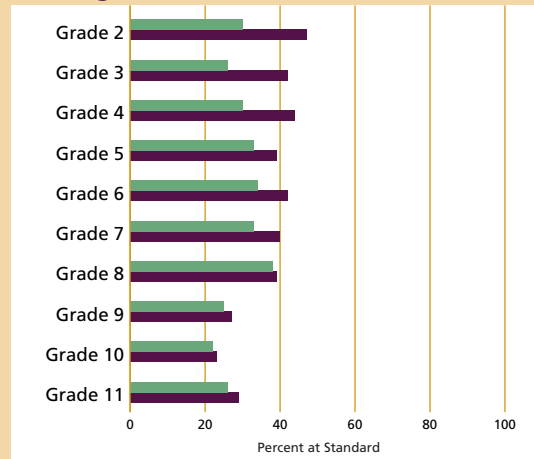
AS PART OF ITS EFFORTS to infuse a sense of accountability throughout its Partnerships and to assist districts in gauging their progress and that of individual schools, the Foundation has developed a variety of assessment tools, which it continually refines. This ongoing process of refinement has recently led to the development of a new tool called Essential School System Purpose and Responsibilities (ESSPAR). As its name suggests, this tool defines the essential purpose of a school system. It then identifies eight school system responsibilities—those things that a school system should hold itself accountable for—and raises a series of questions that can be asked by individuals and groups inside and outside the system, including the Foundation and other partners, to determine how well the system is meeting its responsibilities and fulfilling its purpose of “All means all.”

- **JANUARY**—The Foundation enters into “exploratory partnerships” with Boston (MA), Corpus Christi (TX), Flint (MI), Hayward (CA), Norwalk–La Mirada (CA), Pasco County (FL), and Providence (RI). Subsequently, Boston, Corpus Christi, Flint, Hayward, Norwalk–La Mirada, and Pasco develop into full partners.
- **SEPTEMBER**—The Foundation publishes *Learning by Doing: Panasonic Partnerships and Systemic School Reform* by Terry A. Clark and Richard A. Lacey, St. Lucie Press, Boca Raton, FL.

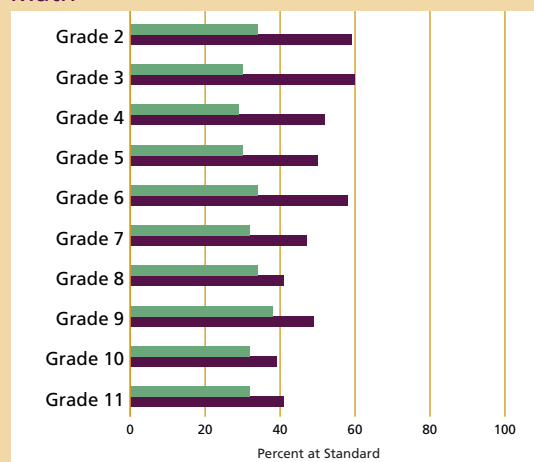
IMPROVEMENTS IN STUDENT LEARNING: Norwalk–La Mirada Unified School District

■ Pre-Partnership ■ Current

Reading



Math



“Panasonic’s example shows that, by using technical assistance that is strategic to what that particular district needs (not a canned approach) and by staying, relationships can develop and then the districts begin to really listen and begin to accept more accountability.”

—Hayes Mizell, *Former Director, Student*

Achievement Program, Edna McConnell


Clark Foundation

PROMOTING CHANGE:

ONE PROMINENT REASON for the reluctance of funders to become involved in systemic reform is the realization that it takes significant time to foster meaningful change in complex public systems. These systems protect themselves through tradition, routine, and practices that stymie any short-term efforts at reform. The Panasonic Foundation understood this when it began its work, and it built its efforts around the knowledge, reinforced by its early experiences with various school districts, that reform—genuine and sustainable change that transforms teaching and learning across large public school systems—is a process, not an event.

THE FOUNDATION'S substantial investment of time begins long before the decision to formalize a partnership is made. Foundation staff and consultants spend several months learning about the district, including meeting with district leaders and other stakeholders to determine if the Foundation and the district are compatible, if they share values and a vision of reform, and if the district is really ready to begin the reform process with Panasonic as a partner.

IN THE PAST, the Partnerships were typically entered into for five or more years. This reflected both how the Partnerships were configured—two entities, one of which was not located in or had close ties to the community in which the district operated—and the Foundation's gradually emerging and expanding knowledge, gained through experience, of what transforming school systems really demands. In this context, the Foundation's commitment of time has been critical for the development of trusting relationships between Foundation consultants and district faculty and staff. Foundation and district personnel come to value one another and to build a history together. These relationships and the rich collaboration they foster are deeply



“What Panasonic showed to everyone—educators and philanthropists—is that this is tough stuff and that there are no road maps or foolproof guides.”

—Warren Chapman, *First Vice President, Corporate Contributions and Community Relations, Bank One*

- **OCTOBER**—Jennifer Yousif joins the Foundation as Program Manager.
- **FEBRUARY**—Kane, Parsons & Associates completes the third external evaluation of the Partnership Program.
- **OCTOBER**—The Foundation launches its Leadership Associates Program (LAP): three, three-day institutes a year using concepts and tools from strategic and systems thinking and aimed at developing institutional leadership capacity in partner districts.
- **DECEMBER**—Richard “Skip” LeFauve (former President, Saturn Motor Company) and Paul Liao (Chief Technology Officer, MECA) join the Foundation Board of Directors.

valued by the districts. Partners note that the ongoing relationships engendered in a Partnership often surpass what districts might have gained from more traditional support from funders. One district administrator from a long-term Partner states that “most foundations seem to be grant-driven instead of goal-oriented,” and that work undertaken by districts under a traditional grant seems to focus on symptoms, not problems. An administrator in a different district echoed these sentiments, noting that pursuing a long-term relationship with a district is a big investment for a funder to make, but there is a far bigger pay-off than if the funder makes a traditional grant.

MANY PARTNERSHIPS have gone well beyond five years; some have lasted more than ten. Even then, a decade after a Partnership begins, districts have proven reluctant to relinquish the benefits of the relationship. Largely at the behest of districts, the Foundation has created a post-Partnership phase during which districts may continue attending Leadership Associates Program institutes and receive periodic advice and assistance from the Foundation.

THE FOUNDATION’S investment of time in its Partnerships has been cherished for many things—recognition of the system as being committed to reform, expertise provided by Foundation staff and consultants, the opportunity to network with other school systems, and the chance to work on specific areas of concern, such as professional development, central office capacity, and leadership. As time goes on, though, more and more systems come to appreciate the longer-term benefit of the affiliation with the Foundation and begin to talk about how the relationship has led to a realignment of district resources and activities with a powerful and compelling vision of reform.

ACCELERATION

ALTHOUGH STAYING the course has been a signature part of its approach, the Panasonic Foundation, through its own process of ongoing reflection and assessment of its work, has become concerned that its extended commitments may have negative effects on the district and on the Foundation itself. The Foundation’s resources are limited, and long-term investments curtail its ability to engage other districts that might also benefit from its expertise. At the same time, it worries that extended engagement may mitigate against the sense of urgency that districts need to have, as well as foster a dependency that may work against districts’ development of internal capacity. Yet it remains clear to the Foundation that it is extraordinarily difficult if not impossible for school systems to make significant change without external support and prodding. Given this, the Foundation is trying out a new Partnership structure. The four newest Partnerships now include a third member from the district’s surrounding community, and the Foundation’s upfront commitment of time to these Three-Party Collaborative Partnerships is limited to two years.

“Among the business community, there is an impatience for results. Panasonic’s willingness to hang in there and not be sidetracked by this impatience is unusual in the business world.”

—Susan Traiman, *Director, Education and Workforce Policy, Business Roundtable*

- **SPRING**—The Foundation publishes the final issue (vol. 9, no. 1) of *P3*.
- **APRIL**—The Foundation enters into a three-year agreement with the University of Washington’s Institute for K–12 Leadership to jointly engage Dr. Stephen Fink to extend the model of “Panasonic Foundation–like partnerships” between the University and Seattle-area school districts.
- **AUGUST**—Robert A. Kronley’s *Learning from Each Other: Questions and Answers About the Clark, Panasonic, and Rockefeller Foundations’ Long-Term Investment in Systemic Education Reform* is published by Grantmakers for Education (San Diego).

THESE CHANGES are significant and will test whether the Foundation and its consultants have gained enough knowledge and experience over the last two decades to more quickly develop trust and go directly to the heart of a district’s issues. Less than a year into the new Partnerships, the outlook is positive. However, the Foundation understands that this may only be the honeymoon period. And because sustaining reform is always more difficult than initiating it, the Foundation hopes that the third parties in the new Partnerships will help the district maintain its direction long after the Foundation leaves.

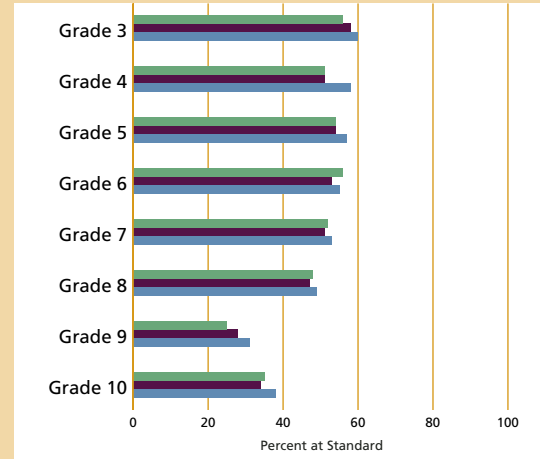
“Panasonic pioneered the understanding of time as a critical factor; they were never confused about how long this work would take and that they could not expect to do something quick and then leave.”

—Kent McGuire, *Dean, College of Education, Temple University*

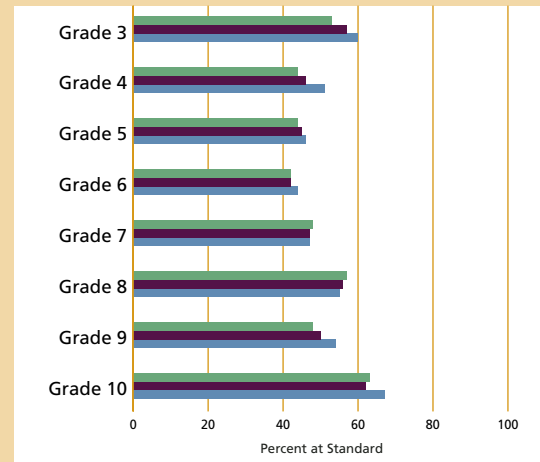
IMPROVEMENTS IN STUDENT LEARNING: Pasco County Schools FCAT Proficiency

■ SY 2001 ■ SY 2002 ■ SY 2003

Reading




Math



OUTREACH:

SCHOOLS AND DISTRICTS very often work in isolation, disconnected from others including those engaged in similar reform efforts. This isolation, for funders as much as for practitioners, detracts from their reform work, limiting what stakeholders can learn from one another. Since undertaking the Partnerships, the Foundation has sought deliberately to communicate its new and evolving knowledge about the difficult challenge of systemic school reform with all stakeholders. It has shared its stories and those of its partners through a variety of means. Among other things, it published, from 1992 until 2000, a newsletter, *P³*, which featured innovative practices in Partnership districts, especially at individual schools. In 1994, it joined with the American Association of School Administrators to publish a series of issue briefs on systemic reform called *Strategies*, which is now in its 11th year of publication. It has also produced several reports that chronicle its journey. In 1997, Terry Clark and Richard Lacey wrote *Learning by Doing: Panasonic Partnerships and Systemic School Reform*, which documented the Foundation's work over 12 years of investment in changing education.

IN 2000, Robert Kronley wrote *Learning from Each Other: Questions and Answers About the Clark, Panasonic, and Rockefeller Foundations' Long-term Investment in Systemic Education Reform*, which distilled common learnings from the disparate approaches that the three foundations used to promote systemic change. Staff and senior consultants have written articles and made frequent presentations at national education and philanthropy conferences about the Foundation's work and lessons learned, and Sophie Sa has been on the boards of numerous local and national education and philanthropic organizations.



"What Panasonic wrote was like a kind of action research. They fed it back to the rest of us, and it influenced our work."

—Carl Glickman, *Roy F. and Joann Cole Mitte Endowed Chair in School Improvement*,
Texas State University, San Marcos

- **JANUARY**—The Foundation resumes its Partnership with Santa Fe Public Schools after a 5-year hiatus.
- **MARCH**—The Foundation holds its 13th and final Annual Partnershipwide Conference.
- **JUNE**—Partnerships with Columbus (OH) Public Schools and Norfolk (VA) Public Schools are launched.
- **JULY**—The Foundation completes the prototype of a new Foundation tool: Essential School System Purpose and Responsibilities.
- **DECEMBER**—The Foundation receives the “Corporate Exemplar” award from Educational Equity Concepts, Inc., in New York City, for sustained effort in improving education for all students.

FOR THE FOUNDATION, the communication about its work is not only for an external audience. It has encouraged Partner districts to look to and has facilitated connections with other districts that are engaged in reform. The LAP institutes not only enable team members to delve deeply into aspects of reform, but they also provide an opportunity for the teams to network with one another, to learn from one another’s experiences, and to connect with institute keynoters, many of whom have been leaders of school systems that have made noteworthy progress. These networking opportunities have been very important to Partner districts; LAP team members and district leaders repeatedly speak of the importance of the network in their efforts.

“The LAP institutes have been crucial—they’ve been critical in breaking down walls between people because they’ve brought people from inside and outside the district together.”

—Cathy Lassiter, *Senior Director of Leadership and Capacity Development, Norfolk Public Schools*

THE FOUNDATION has also encouraged system officials and participants in LAP to consider their “audience” for the work that arises out of the institutes as not only themselves—LAP team members—or even teams from other districts, but also the faculty, staff, and other stakeholders in their districts. As the Foundation knows, reform will not succeed without a well-crafted communications plan that incorporates strategies to engage districts’ internal and external

audiences. With this in mind, Foundation staff determined to set aside the final afternoon of each institute so that district teams have time to develop a “re-entry” plan, a set of “next steps” that team members need to take after they return to their districts. Foremost among the next steps articulated in the re-entry plan are specific communications strategies to inform various stakeholders about what was achieved and decided at the LAP institute. The Norristown Area School District, for example, decided early on to constitute a LAP “home” team, which includes all of the “travel” LAP team members plus a number of other system- and school-level leaders. Further, with training by the Foundation’s consultants, the home team has served as facilitators for the full faculty of the high school to discuss the LAP work.

IN NORRISTOWN, the Panasonic consultants are also working with the community’s Business/Industry/School Partnership Program and the district’s Community Relations and Marketing Committee on strategic improvement of the school system’s communications and engagement activities.

COMMUNICATION, however, is not a one-way process. The Foundation stresses that effective communications entails ensuring not only that information flows from decision makers to stakeholders but also the reverse. Because this happens so rarely in districts, one of the first steps Foundation consultants take with each Partnership district is to meet with community members, principals, teachers, and frequently students to understand their perceptions of what is happening in the district and what its needs are. The consultants’ findings are usually eye-opening for the district’s administration, raising issues it had not been aware of and

- **JANUARY**—Sophie Sa and Robert Greenberg (Vice President for Corporate Brand Marketing, MECA) join the Foundation's Board of Directors.
- **MARCH**—The Foundation receives the Council for Aid to Education/Rand Corporation's Leaders for Change, Sustained Excellence Award.
- **JULY**—The Foundation enters into new, two-year "Three-Party Collaborative Partnerships" with Atlanta (GA) Public Schools, Highline (WA) School District #401, Norristown Area School District (PA), and Racine Unified School District (WI).

Emphasis on communication and on the dissemination of learnings has made the Panasonic Foundation a recognized leader among philanthropic organizations that embrace comprehensive, sustained education reform. Twenty years ago, when Panasonic began an investigation into the feasibility of foundation involvement in school system reform, no other funders were working in this area. Today, there is a robust field of philanthropic organizations that have

at one time or another committed to multiyear investments, some of them partnerships, to transform school systems. Among those who have credited the pioneering work of the Panasonic Foundation for encouraging them to enter or persist in this work are representatives of the Ball Foundation, the BellSouth Foundation, the Rapides Foundation, the Rockefeller Foundation, and the Stupski Foundation.

demonstrating the value of open communication in every direction.

DESPITE THIS DEMONSTRATION, ensuring that information flows throughout a system is a significant and ongoing challenge for people accustomed to working in relative isolation. Separation is compounded by the hierarchical and political nature of public education, in which subordinates are reluctant to provide critical feedback to superordinates, leaders are reluctant to admit mistakes, and everyone is afraid of retribution. Open and honest communication requires a level of trust and a cultural shift that many find difficult. It is, however, a necessary component of a learning community that is serious about change.

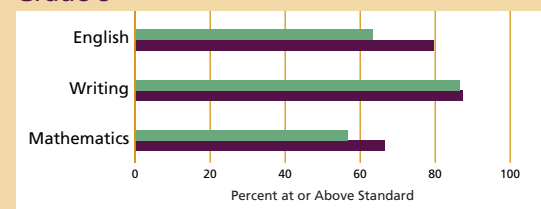
"Panasonic's example and coaching stimulated us not to rely on programs to support but to reach for deeper, more strategic involvements than we might otherwise have done."

—Chad Wick, *President, KnowledgeWorks Foundation*

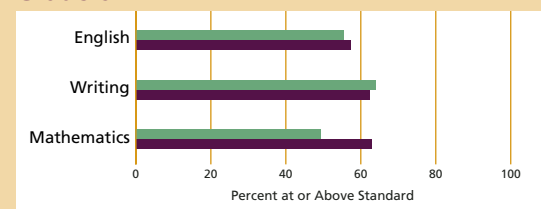
IMPROVEMENTS IN STUDENT LEARNING: Norfolk Public Schools District Indicators

■ Pre-Partnership ■ Current

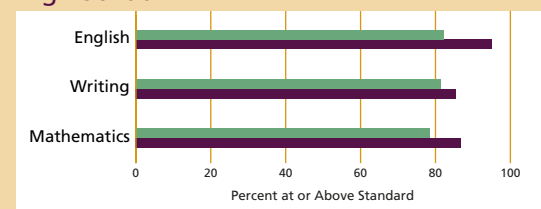
Grade 5



Grade 8



High School





CONCLUSION

THE PANASONIC FOUNDATION is on the cusp of completing its second decade; virtually all of this time has been spent immersed in the difficult business of engaging school systems in long-term efforts to improve themselves systematically so that all of their students will find academic success. Although Partnership districts still have much to do to fulfill this hope, there are clearly reasons to celebrate the accomplishments of the Foundation and its Partners.

THE FOUNDATION has demonstrated the centrality of a value-driven approach to change. The Foundation's work, through each successive iteration, has remained connected to an unwavering belief system. Its values are, at least in part, traceable to those of the Matsushita Electric Corporation, and its subsidiary, the Panasonic Corporation, and reflect its ethos—integrity, quality, foresight, and innovation.

MONEY MATTERS in philanthropy and in education reform, but the Panasonic Foundation has demonstrated that money does not dictate impact. The Foundation supported consultants in efforts to transform districts in part because it did not have sufficient funds to hire a large staff or to make substantial grants. In doing so, the Foundation has shown that dedicated, knowledgeable individuals can make a difference in complex systems if they develop and nurture relationships with key individuals and possess the flexibility to fashion pragmatic yet outside-of-the-box responses to changing contexts.

- **MARCH**—A CD-ROM about the Foundation is completed, in both Japanese and English.
- **JUNE**—The Foundation and its 10 Partner districts are recognized as inaugural finalists for the Council for Corporate & School Partnerships' National School and Business Partnerships Award.

TWENTY YEARS AGO engaging school systems in long-term reform was uncharted territory. Exploring it required an acceptance of risk and a willingness to make one's own way. Yet what was once uncultivated ground has now become, in part because of the Panasonic Foundation's efforts, a "field" with many different hands tending to it and reaping rich, if varied, results.

IN THE SCHOOL SYSTEMS that the Panasonic Foundation has engaged, results count for everyone. The Foundation has been passionate in its commitment to ensuring that its investments benefit all students and has been adamant in its insistence that its Partners reflect this dedication. It has been similarly steadfast in communicating that excellence cannot be achieved if equity is ignored.

ABOVE ALL, the Foundation's emerging legacy is about the compelling connection between leadership and learning. The Foundation is recognized for its leadership in school reform—for defining an issue, for crafting a novel solution to it, for its long-term dedication, and for encouraging others to make similar investments. It has earned this recognition because it has continuously reflected on its own efforts and drawn on what it has learned to transform itself. This restless and relentless reach for excellence is at the core of the Foundation's commitment and is the base on which its successes have been built.

"Panasonic opened up our eyes and got the rest of us thinking about how we could carry out our philanthropic mission more creatively, more directly, more in touch with the deeper issues. At the same time, a big question remains about their legacy: Have they been able to embed the results of their work in those districts? They built new capacity; has it been sustained?"

—Ellen Hershey, *Former Program Director,*

Stuart Foundation

**APPENDIX A:
SCHOOL SYSTEM PARTNERS**

PARTNERSHIP SITES:

Allentown School District, PA: 1989–1998

Atlanta Public Schools, GA: 2003–

Boston Public Schools, MA: 1997–2002

Broward County Public Schools, FL: 1995–2000

Cincinnati Public Schools, OH: 1995–2000

Columbus Public Schools, OH: 2001–

**Corpus Christi Independent School District, TX:
1997–**

Dade County Public Schools, FL: 1988–1990

East Baton Rouge Parish School System, LA:
1989–1993

Elizabeth Public Schools, NJ: 1992–1994

Englewood Public Schools, NJ: 1989–1991

Flint Community Schools, MI: 1997–2002

Hayward Unified School District, CA: 1997–2002

Highline School District #401, WA: 2003–

Lancaster, School District of, PA: 1994–2001

Maine State Department of Education: 1994–1996

Minneapolis Public Schools, MN: 1989–2000

Minnesota State Department of Education:
1990–1992

New Jersey State Department of Education:
1991–1993

New Mexico State Department of Education:
1990–1998

Norfolk Public Schools, VA: 2001–

Norristown Area School District, PA: 2003–

Northern New Mexico Network for Rural
Education: 1995–2000

**Norwalk–La Mirada Unified School District, CA:
1997–**

Pasco County, District School Board of, FL: 1997–

Racine Unified School District, WI: 2003–

Rhode Island State Department of Education:
1994–1997

Rochester Public Schools, NY: 1988–1991

San Diego City Schools, CA: 1987–1998

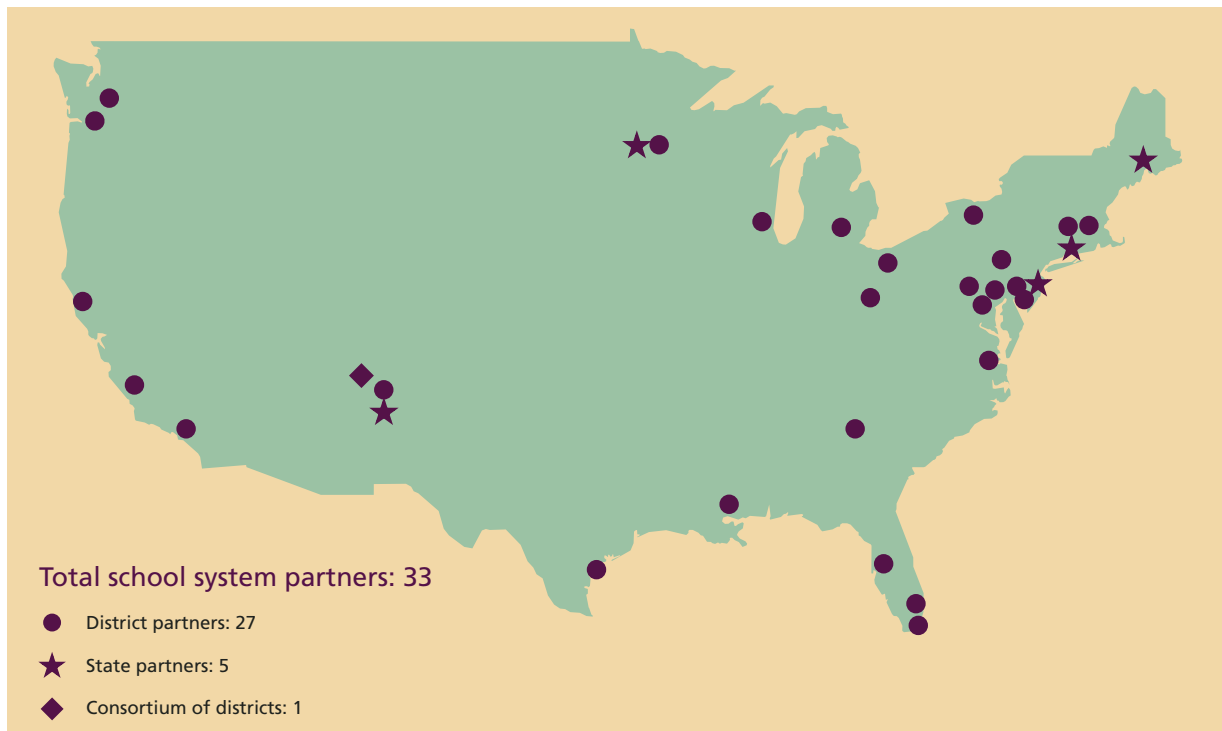
Santa Fe Public Schools, NM: 1987–1995; 2001–

Seattle Public Schools, WA: 1987–1992

Somerville Public Schools, MA: 1995

William Penn School District, PA: 1995

Bold = Current Partners



APPENDIX B: CONSULTANTS, DIRECTORS, OFFICERS, STAFF

CURRENT SENIOR CONSULTANTS

Dean Damon—former superintendent, Boulder Valley Public Schools, CO; former executive director, Colorado School Finance Project

Scott Elliff—executive director, Citizens for Educational Excellence, Corpus Christi, TX; former director, public affairs and government relations, Corpus Christi Independent School District, TX

Lawrence Feldman—elementary school principal and former regional superintendent, Dade County Public Schools, FL

Stephen Fink—director, Center for Educational Leadership, and associate professor, University of Washington; former assistant superintendent, Edmonds (WA) School District

Andrew Gelber—independent consultant; former director of school programs, Philadelphia Partnership for Education

Gail Gerry—researcher, Consortium for Policy Research in Education; former Kentucky state director of professional development

JoAnn Heryla—educational specialist, Minnesota Department of Children, Families and Learning; former area superintendent, Minneapolis Public Schools

Sue Kinzer—former associate professor, University of Florida and Florida Atlantic University; former director of evaluation, Broward County Public Schools, FL

Patty Mitchell—senior program manager and state alliances coordinator, Learning First Alliance; former program director, Council of Chief State School Officers

George Perry Jr.—director, Perry and Associates, Inc.; former director of student and community services, Massachusetts Department of Education

Tony Rollins—director, KnowledgeGate, LLC; former assistant executive director, National Teachers Association

Betty Jo Webb—president, Dr. Betty Webb Consulting, Inc.; former associate superintendent for elementary and secondary education, Minneapolis Public Schools

Deborah Winking—former director of assessment, Minneapolis Public Schools

“FOUNDING” SENIOR CONSULTANTS*

David Florio—program manager, the Stupski Foundation

Michael Holzman—independent consultant; former program officer for education, American Council of Learned Societies

Richard Lacey—independent consultant; former head of school, Little Red Schoolhouse, New York City

Kenneth Tewel—former associate professor, Program in School Administration and Supervision, City University of New York; former deputy executive director and principal, high school division, New York City Public Schools

BOARD OF DIRECTORS

Masaharu Matsushita
Honorary Chairman
Honorary Chairman of the Board and Executive Advisor, Matsushita Electric Industrial Co., Ltd. (Japan)

Robert S. Ingersoll
Founding Chairman
Former U.S. Ambassador to Japan
Former Assistant Secretary of State for Asia and the Pacific
Former CEO, Borg-Warner

Robert Greenberg
Vice President, Corporate Brand Marketing, Matsushita Electric Corporation of America (MECA)

Paul Liao
Chief Technology Officer, MECA

Deborah Meier
Principal, Mission Hill Elementary School, Boston

Martin Meyerson
Founding Director
President Emeritus and University Professor, University of Pennsylvania

Ira Perlman
Founding Director
Former Vice President for Administration, MECA

Sophie Sa
Executive Director, Panasonic Foundation

* retired from Panasonic Foundation

CONSULTANTS, BOARD, AND STAFF
(continued)

OFFICERS

Sandra Karriem

Secretary

Senior Corporate Attorney, MECA

Richard La Monica

Treasurer

Comptroller, MECA

Robert Ohme

Assistant Treasurer

Group Manager, Retirement Planning and
Administration, MECA

STAFF

Kathleen Archetti

Planning Coordinator

Eileen Murphy

Bookkeeper

Sophie Sa

Executive Director

Scott Thompson

Assistant Director

**APPENDIX C:
FINANCIAL SUMMARY**

Initial Endowment (1984):	\$10,000,000
Additional Endowment (1993–1995):	\$10,000,000
Total Gross Earnings at 31 March 2004:	\$26,792,000
Total Expenditures Since 1984:	\$25,681,000
Assets at 31 March 2004:	\$21,681,000

Panasonic Foundation, Inc.
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Secaucus, New Jersey 07094
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July 2004

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