

MEMORANDUM TO RON KLAIN

FROM: Jon Schnur

DATE: June 23, 1999

RE: Attachment you requested describing a work plan, possible schedule, and set of responsibilities.

Attached is the memo that you requested outlining a proposed work plan, possible schedule of education announcements, and set of responsibilities for the role we discussed.

The attachment describes a core set of responsibilities, other responsibilities that we could discuss adding, and a few outstanding issues to be resolved. I also attached a very rough draft of a timetable for announcements and schedule of work – the timetable and schedule is clearly not something that we need to finalize or agree on at all. Obviously, the timing of the announcements -- and therefore my work schedule -- would be subject to change as plans evolve and change for the Vice President's schedule and his policy announcements.

I would also be very happy to take several steps to ensure my regular availability to you throughout this process. These steps could include getting a pager and cell phone so that you can contact me whenever you need; and setting up weekly or semi-weekly meetings to brief and get guidance from you and/or others. Moreover, this proposed plan could work very well in concert with the kind of arrangement you are discussing with Paul Weinstein – he and I have discussed this.

Major issues to resolve, I think, are: 1) do you think the responsibilities described in the attachment make sense, 2) salary, and 3) to whom would I report, and would the arrangement be with OVP, Gore 2000, or some combination?

Thanks a lot Ron. Let me know what you think and how you would like to proceed.

RESPONSIBILITIES

- 1) Develop monthly options memos on education policies to be announced by the Vice President. Each memo would provide succinct, well-researched options for accomplishing an education policy (e.g. preschool, after-school, reforming the American high school, teacher quality); an analysis of the benefits and drawbacks of each option; cost estimates; a description and analysis of a short list of key policy/political decisions that must be made in order to finalize the policy; a summary of the relevant educational research; a description of the current policy and political landscape; likely reactions from key constituencies; and recommendations. Consult with senior advisors to the Vice President and, as appropriate, key education policy-makers in the development of the memos.
- 2) Provide oral briefing summarizing the content of each memo in a decision meeting involving the Vice President and/or senior advisors each month, generally about two weeks before an announcement/speech is to be made. Participate in all key meetings involving the Vice President and senior advisors that involve policy decisions related to each of these education policy announcements.
- 3) Provide key background points to include in speech announcing the policy. Review and comment on drafts of speeches for these announcements.
- 4) Draft one-pager describing the policy initiative for distribution to the press and public.
- 5) Regularly brief and get guidance from VP advisors, perhaps through weekly or semi-weekly mtgs.
- 6) Brief key education groups and opinion leaders in order to garner support for the policy. This could be done the day of – or day after -- the Vice President's announcement.

POSSIBLE ADDITIONAL RESPONSIBILITIES -- WOULD NEED DISCUSSION

- 7) Identify and brief validators for each policy announcement.
- 8) Provide advice in the development of event for each announcement and Q&A with event participants.
- 9) Draft an op-ed for each announcement that could be placed in newspapers supporting the Vice President's policy.
- 10) Answer questions from the press about each policy initiative, as appropriate, the day of the announcement. Moreover, could provide advice as needed for responses to criticisms of policies and to other candidates' speeches and announcements.

Travel. This would probably involve travel to DC twice a month, once a couple of weeks before an announcement and another at the time of the announcement.

Time. This will involve approximately eight or nine days a month (on average, two days a week). This would involve about four to five days of research and writing in New York; two days in DC mid-month for decision mtgs; and two days in DC around the time of the announcement. This would begin September 1.

Compensation. Travel costs and incidental costs would be covered. Salary level to be negotiated.

OUTSTANDING ISSUES

- 1) Do the responsibilities and other issues described above make sense?
- 2) What is the salary? (Ideally, it would be as close as possible to 2/5 of my current salary. But this obviously needs discussion.)
- 3) To whom would I report, and with which organization is this arrangement?

BRIEFING ON FIXING FAILING SCHOOLS

1) What are the characteristics of low-performing schools?

Low-performing schools are located in impoverished communities. The data we have on gaps in student performance are most pronounced when we look at student performance in schools with highly concentrated poverty compared with low poverty schools. NAEP results show that average performance lags by grade levels in schools where 75-100 percent of the students receive free and reduced price lunch. Despite recent performance gains among low-performing students, throughout the years NAEP results show consistent 20-30 point differences in the average scores in high-poverty schools compared to affluent schools.

Low-performing schools often have limited financial, human, and programmatic resources to support high-quality teaching. Many low-performing schools have inadequate facilities (aging buildings), and lack of books and supplies. Teachers in high-poverty schools are more likely to be teaching without a license or outside their field of training.

Low-performing schools are often characterized by stress and disorder. Because many low-performing schools are located in impoverished communities, family distress, crime, and violence are often prevalent, making it difficult for children to come to school prepared. These factors cause stress and disorganization in schools. Teachers develop lower expectations for students. Some teachers burn out and turnover of faculty can be high. The relationship between teachers and parents is often hostile. Motivation and hope can evaporate. The result is chronically low student performance.

Low-performing schools often have highly mobile student populations. Low student achievement is accompanied by high rates of absenteeism, dropping out, and/or delinquency.

2) Where are low-performing schools?

Refer to Table 10.1 from the 1998-99 National Longitudinal Survey of Schools. This nationally representative sample of Title I schools allows us to look at the characteristics of schools identified as in need of improvement (as low-performing) under Title I, compared with Title I schools in general. Schools are identified largely based on student performance against state standards.

Note: 1998-99 data on schools identified as in need of improvement across the states – approximately 11,000 nationally.

Low performing (Title I) schools tend to be larger schools. As the chart indicated, schools with 600 or more students are disproportionately identified as in need of improvement.

Low-performing schools tend to be schools with a high percentage of minority students.
Title I schools where 75-100 percent of students are minority are significantly more likely to be identified as in need of improvement under Title I.

Low-performing schools are disproportionately located in urban areas. Title I schools identified as in need of improvement are disproportionately urban schools.

3) What are some of the biggest challenges facing these schools?

Poverty
Limited English proficiency
Student mobility
Teacher quality and retention of high-quality teachers
Stable leadership
Retention and social promotion
Safety

4) What kind of help do these schools get?

From the U.S. Department of Education, \$6 billion in Title I is the most important source of federal investment in addressing needs of low-performing students and high-poverty schools. Title I requires states to identify, assist and intervene in schools that fail to make progress toward all students meeting standards.

\$134 million in school improvement funds to raise the capacity of states and districts to intervene and assist low-performing schools.

\$220 million in CSRD to help low-performing and high-poverty schools adopt research-based strategies and use external technical assistance to engage in whole school reform.

Federal support for class size reduction, extended learning time/afterschool, reading excellence, etc.

5) What are effective strategies for turning around low-performing schools? What steps have turned around schools taken?

Set high expectations
Use data to drive continuous improvement
Early intervention and prevention
Hold schools accountable for performance
External assistance
Professional development focused on instruction and curriculum
Recruit and retain qualified teachers
Stable and competent leadership
Focus on academics
Extended learning time
Smaller learning settings

Engage parents and families as partners

6) To what extent is reconstitution used and with what results?

In 1998, the AFT reported that there were 22 states that had the power to reconstitute schools. Note that this references authority residing at the state level. Within states, districts may have and/or be exercising reconstitution authority.

Reconstitution takes many forms, from replacing a principal to completely removing faculty, shutting a school down and reopening it. Some places, such as New York, exercise reconstitution as more of a collaborative school “redesign” effort, bring external teams into a school to help it fashion and improvement plan and help move out of the school staff who are not on board with reform efforts.

We don’t have a great deal of information on reconstitution and how often it is used nationwide. We do know that some of the districts that have reconstituted schools (San Francisco, Chicago, Houston) and states such as Oregon and Maryland, have used this strategy on a VERY limited basis.

Jennifer O’Day’s work on reconstitution suggests that there is no conclusive data demonstrating that the threat of reconstitution is an effective motivator for change. Reconstitution can be demoralizing or constructive. Research suggested that for reconstitution to work, it is not enough to replace the adults in a troubled school. Low-performing schools must overcome long-term legacies of failure. These schools need external assistance in rebuilding – chronically low-performing schools are least in a position to help themselves. Successful reconstitution requires:

- strong leadership
- a clear break with past practices
- sustained professional development in instruction
- high expectations for students
- district and state support and assistance

7) How well do comprehensive models work?

CSRD is highly targeted in high-poverty schools and schools identified for improvement under Title I. The program helps schools adopt research-based models as part of a comprehensive reform effort. It is important to note that “comprehensive” may not well describe models – many focus on particular subject areas for example – few address all aspects of a school. The key to models is that they can introduce research base practices and give schools an external provider of support, professional development and assistance. The key to comprehensive school reform is that schools rethink and address how all school resources, activities, programs and energies can be focused and coordinated to help all students reach standards.

That said, we need a lot more rigorous research on school improvement models. In 1999, the American Institutes for Research analyzed more than 100 research studies on 24 reform models in *An Educators' Guide to Schoolwide Reform*. AIR concluded that three models showed significant positive evidence of effectiveness in improving student achievement (Success for All, Direct Instruction, and High Schools That Work) and several were judged to have promising or emerging positive research findings.

Looking across the studies, AIR also identified some common characteristics to models that showed results. AIR found that structured models that are more directive about what or how teachers teach have higher levels of implementation than models focused on changing the philosophy or offering a general approach to school reform. Models that focus on curriculum and instruction tend to have stronger effects on student achievement.

We are beginning to collect student achievement data on all CSRD schools this fall and will track student performance over time in schools using various models. The Department is also tracking a number of research efforts aimed at adding to the research-base on model effectiveness.

8) Federal barriers to reform?

Mostly lifted. The last reauthorization of the ESEA made it significantly easier for higher-poverty Title I schools (with 50 percent or higher poverty) to combine and coordinate federal funds across federal programs and with state and local resources by operating as schoolwide programs.

However, it remains a challenge to help schools, districts, and states use this flexibility to empower school improvement efforts.

9) Title I accountability fund – how do the applications look and how will districts implement choice provisions?

[Elois was going to talk with Susan Wilhelm about this]

October 21, 1999

MEMORANDUM TO BETHANY LITTLE

From: Theresa Sirois

RE: Character Education

The programs described below include some of the recent Administration and Department of Education work on character education. The first is a grant program, the Partnerships in Character Education Pilot Project Program, was authorized by the Elementary and Secondary Education Act. The second, the Blue Ribbon Schools Program, is an awards program that honors model elementary schools for different accomplishments. In 1998-99, the Department of Education gave special emphasis to schools that exhibit the best practices in character education. I have also included a brief description of the President's Safe Schools/Healthy Students Initiative which was authorized under the Improving America's Schools Act of 1994. It is generally focused toward reducing drugs and violence in schools; however, this type of programs may also have implications for character education as a preventative measure.

I contacted David Thomas at the Department of Education, and he directed me to their website which describes the grant programs and lists the grantees for the past five years. He also suggested we contact the "Team Leader" for the Character Education Program, Beverly Farrar, and her boss, Pat O'Connell Rossk. I have listed their contact information for your reference at the end of this memo.

The Partnerships in Character Education Pilot Project Program

The Secretary may make a total of ten grants annually to state educational agencies (SEA) in partnership with one or more local educational agencies (LEA). Each state is limited to a total of one million dollars over a period of no more than five years. The state may retain no more than 30 percent of the funds; the remainder must be given to the LEAs. There are currently 28 states funded by the Department of Education.

Parents, students, and community members, including private and nonprofit organizations, can participate in the design and administration of the projects. The projects will help states work with school districts to develop curriculum materials, provide teacher training, involve parents in character education and integrate **character education** into the curriculum. Each project will design activities to incorporate six elements of character,-- caring, civic virtue and citizenship, justice and fairness, respect, responsibility, and trustworthiness. Projects may add other elements of character deemed appropriate by the members of the partnership. Each project must also establish a clearinghouse for the distribution of materials and information about character education and include an evaluation designed to determine the success toward reducing discipline problems, and improving student grades, participation in extracurricular activities, and parent and community involvement.

- Fund for the Improvement of Education Website

Blue Ribbon Schools for Character Education

The elementary schools that were awarded the Department of Education's 1998-99 Blue Ribbon Schools for Special Honors in Character Education. These schools and the criterion with which they were chosen provide insight on what kind of program the Vice President may want to promote and best practices to promote at schools across the country.

Award criteria included:

- *Implementation and philosophy:*
 - Strong philosophy of core ethical values such as caring, honesty, fairness, responsibility, and respect for self and others
 - Provides opportunities for moral action
 - Commitment and integration of core values in community
- *Partnerships:*
 - Identifies and supports families as the most essential moral educators
 - Involves families in activities and decisions
 - Works with families and community organizations to promote core values
- *Professional development:*
 - School staff models and promotes core values
 - Staff integrates values into school activities
 - Staff meet and reflect on moral issues affecting the school
- *Assessment:*
 - Evaluates of the development of staff as character educators
 - Assesses students' understanding of, commitment to, and action upon core values
 - Assists school in improving their promotion of values and a more caring environment

Best Practices at 1999 Blue Ribbon schools:

- Identifies specific areas in the school community and environment where respect was lacking
- Planning committee created definition of "respect" to be upheld by school: actions worthy of high regard and demonstration of concern for others: compliments, honesty, listening to others, politeness, working well with others, etc.
- School conducts responsibility and respect-promotional activities, events and lessons such as "Family Feature Films" and games in which students modeled respectful behavior.
- Parent-Teacher Committee developed lessons for teaching appropriate behavior called "Life Skills" (caring, common sense, cooperation, courage, curiosity, effort, flexibility, friendship, initiative, integrity, organization, patience, perseverance, problem solving, and responsibility)
- Created a school motto based on core values: "P.R.I.D.E.: Personal best, Responsibility, Involvement, Decision-making, Esteem
- Upper grades resolve conflicts through class councils or meetings where children talk about problems, solutions and choices- stress on positive interdependence, individual accountability, social skills, cooperative learning and face-to-face interaction.
- Promotion of school community through a "Buddy Program" across grade levels in which children from older and younger classes are paired for peer learning and positive interaction
- Teacher and student commitment to a recognized set of core values promoted through newsletters, songs, lessons, events, and parent-teacher programs.
- Staff trained in the techniques of non-violent crisis intervention by a behavior resource specialist

- Periodic cultural heritage events and workshops to promote school unity through understanding and respect
- Consequences for breaking school rules are assigned only after administration has conferred with parents. Staff, parents and child come together to discuss child's actions and why they were wrong.
- Individual behavior contracts between staff and students, with the help and consideration of parents
- Positive male role models reinforce curriculum values through an active fathers organization
- School-wide participation in National Kindness Week
- Counselors conduct a program to teach students about cultural difference and respect. Each grade has different lessons and activities appropriate for their grade level and the program continues throughout the students' education.
- Community organization comes to school to conduct a family support program called "Family Youth Interaction training" focused on high-risk students. The course teaches conflict resolution, problem-solving and effective parent-planning techniques.
- Mandatory community service requirements to connect students and the school with the community.

Safe Schools/ Healthy Students Initiative

The Improving America's Schools Act of 1994 authorized the Safe and Drug-Free Schools Program(SDFS). It has been the Federal government's primary vehicle for reducing drug, alcohol and tobacco use, and violence, through education and prevention activities in our nation's schools. The State Grants for Drug and Violence Prevention Program provides funding for a wide range of school-and community-based education and prevention activities. National Programs carries out a variety of discretionary initiatives that respond to emerging needs.

The program funding allows State education agencies, local education agencies, and educational service agencies and consortia of such agencies to establish, operate and improve local programs of school drug and violence prevention, early intervention, rehabilitation referral, and education in elementary and secondary schools. State education agencies receive funding for development, training, technical assistance and coordination activities. Governor's offices receive funding to give grants to, and contracts with, community-based organizations and other public and private nonprofit agencies and organizations for programs of drug and violence prevention, early intervention, rehabilitation referral, and education. The program also allocates funding to public and private nonprofit organizations, including community-based agencies and institutions of higher education, to conduct training, demonstrations, evaluation, and to provide supplementary services for the prevention of drug use and violence among students and youth.

-www.ed.gov/offices/OESE/SDFS/

Beverly Farrar: 219-1301
Pat O'Connell Rossk: 219-2169

TO: BETHANY LITTLE

FROM: CURTIS RICHARDS

RE: MATERIALS FOR THE VP'S SPECIAL ED EVENT ON MONDAY

16 pages

Sorry I didn't hear from you last night.

Under the leadership of the Clinton-Gore Administration, the Individuals with Disabilities Education Act (IDEA) was reauthorized in 1997. Those amendments to this civil rights legislation significantly improved educational opportunities for children with disabilities. The IDEA '97 focused on teaching and learning, and established high expectations for disabled children to achieve real educational results.

The focus of IDEA has changed from one that merely provided access to an education to one that improves results for all children in our education system. The IDEA strengthens the role of parents in educational planning and decision making on behalf of their children. It focuses the student's educational planning process on promoting meaningful access to the general curriculum. The new law also reduces the burden of unnecessary paperwork for teachers and school administrators. All of this was accomplished without compromising the Clinton-Gore Administration's fundamental principle of protecting basic rights of children with disabilities to a free appropriate public education.

Attached are some materials that I thought you might find useful in developing any speech or briefing materials on special education. Shortly, I will also fax you some budget-related material, including an early intervention proposal.

Hope these are helpful. If you need to reach me, please feel free to contact me at home (202.966.7659), Office (202.205.5465), or Cell phone (202.262.8966).

TALKING POINTS IDEA '97 FINAL REGS

1) MESSAGE: IDEA '97

- a) Consistent with President/Secretary School Reform Efforts
- b) Increased Emphasis on General Curriculum
- c) Improved Educational Opportunities for Disabled Children
- c) Set High Expectations for Disabled Children
- d) Focus on Teaching & Learning
- e) Lot of Changes to Law made on Bipartisan Basis

2) REGULATIONS PACKAGE

- a) Final regulations in Federal Register March 12
 - Published NPRM in October 97
 - Comment period ended late January 98
 - Nearly 6000 comments to analyze and respond
 - Major letter from Congressional Republicans
- b) Listened carefully to ALL perspectives
 - 60 percent of NPRM sections modified
- c) User Friendly Package
 - Organized to be clear & helpful
 - Everything in One Place
 - No Notes
 - Incorporate Major Long-Standing Policy Letters
 - 25% of package is text of regs----includes statute
 - Two thirds analysis and other required documents
 - Key TA Documents
- d) Reflect the Many Changes in Law

3) MAJOR ISSUES

- a) **IEPs & General Curriculum**
 - IDEA focus on Special Ed Students involved and progressing in general curriculum
 - Appropriate accommodations & supports
 - IEP tool to achieve that end
 - Specific statements required by law in IEP
 - levels of education performance
 - Measurable annual goals

- Special ed, related services & supplementary aids & services
- Program modifications of supports

b) **Assessments**

- IDEA says disabled children included in general state and district-wide assessment programs & sets timelines
- Regs incorporate statute
 - Includes appropriate accommodations & modifications
 - Allows for alternate assessments no later than July 2000
 - Requires reports on student results

c) **Regular Ed Teacher Involvement in IEP Teams**

- IDEA '97 added regular ed teacher to IEP team for most disabled students
- Regs give schools flexibility
 - Extent of teacher involvement to be determined on a case-by-case basis
 - LEA designates teacher(s) for team
 - All teachers to be informed of responsibilities for implementing IEP

d) **Graduation with a Regular Diploma**

- Regs incorporate long-standing Department policy
- Keep with general education curriculum theme
- Graduation with regular high school diploma is change in placement
 - Requires Notice
 - No re-evaluation
- Right to FAPE terminates
- FAPE continues under other circumstances

e) **Discipline**

1) **Message**

- Found balance between schools' ability to offer quality education in safe environment AND protecting student's right to FAPE

- IDEA 97 made major discipline changes
 - Statute incorporated prior court decisions & department policy
 - Regs clarify school personnel do have authority to remove children to preserve school safety
- ii) IDEA '97 says:
- Can remove child for up to 10 school days at a time for any violation of school rules as long as
 - Not a pattern
 - No long-term suspension or expulsion for behavior that is manifestation of disability, and
 - Services continue for children with disabilities who are suspended or expelled from school
 - Can remove to an Interim alternative education placement for up to 45 days for dangerous behavior involving
 - weapons or drugs
 - hearing officer recommends because student substantially likely to injure self or others
 - Schools must assess children's troubling behavior and develop positive behavioral interventions
- iii) Regs clarify that:
- A) Educational Services
- No Services in first 10 school days in a year
 - Services for subsequent removals for less than 10 days
 - School personnel determine in consult with Special Ed teacher
 - Services for long term removals when behavior not a manifestation of disability
 - IEP team determines



UNITED STATES DEPARTMENT OF EDUCATION

PUBLIC AFFAIRS

OFFICE OF THE DIRECTOR

September 8, 1999

Memorandum to: Secretary Richard Riley
Ann Lewis
Bruce Reed

From: David Frank D.F.
Kevin Sullivan

Subject: Religion in Public Schools

In the last six weeks we have been developing and updating at the request of Ann Lewis a series of guides and documents that can help educators and teachers address the subject of religion in public schools. Our purpose in developing these documents in conjunction with the Freedom Forum is to make sure that every school in the country is aware that a "comprehensive" package of documents is available to them.

We are planning an initial printing of 150,000 and we propose sending a packet to every school in the country (100,000) that includes all the documents with a cover letter from Secretary Riley. Two of the documents are from the Department. Three documents were written by Charles Haynes, the Senior Scholar at the First Amendment Center of the Freedom Forum, and of these two were written at our request. The Freedom Forum very generously is spending \$90,000 to cover the cost of printing 3 of the documents. The package includes the following:

(1) A Teacher's Guide to Religion in Public Schools

This document has been drafted at our request by Charles Haynes of the Freedom Forum and has been vetted by both the Department of Justice Office of Legal Counsel as well as our Office of the General Counsel. This document has received the endorsement of 16 major educational and religious groups including the NEA, AFT, NSBA, the American Jewish Congress, The Christian Legal Society and the National Association of Evangelicals. This document would be the "new" deliverable. It does not speak to the issue of creationism.

(2) A Parents Guide to Religion in Public Schools

This document was written at our request in 1995 and published jointly by the Freedom Forum and the National PTA. It has just been updated to reflect the Supreme Court's decision in **Boerne v. Flores** which declared the Religious Freedom Restoration Act unconstitutional.

(3) *Public Schools & Religious Communities: A First Amendment Guide*

This is a Freedom Forum document that was released earlier this summer that was jointly published in conjunction with American Jewish Congress and the Christian Legal Society. The document is a guide for how religious communities can work with public schools without overstepping constitutional boundaries. Secretary Riley released a statement in support of this guide.

(4) *Religious Expression in Public Schools: A Statement of Principles*

This is the official Department of Education guide that was released in 1995 at the request of the President and revised in 1998 to reflect the Supreme Court's decision in *Boerne v. Flores*.

(5) *Partnerships: Faith Communities Supporting Public Education*

This is a Department document that provides specific examples of how faith communities are currently working to support public education.

In addition we have a small pamphlet entitled **American Legacy: The United States Constitution & other Essential Documents of American Democracy** that we could add to the mix to make the direct and symbolic connection that the various religious guides in the mailing are linked to and reflect the U.S. Constitution.

This proposed mailing would be different than past efforts to address religion in public schools in several ways. First, it would be more comprehensive and give all parts of education community -- parents, educators, faith-based communities -- specific guidelines tailored to their needs. Second, in an effort to reach a broader audience of teachers and principals we propose sending the entire package to every school in the country. In the past, we have only mailed our "Religious Expression in Public Schools" guide to school district superintendents in 1995 and 1998.

BRIEFING MEMO ON CHARTER SCHOOLS

Since 1991, 20 states have enacted laws permitting the establishment of charter, or independent public, schools. About 265 charter schools have opened their doors, and most of these are in six states: California, Minnesota, Michigan, Colorado, Arizona, and Massachusetts. Well over 100 other schools will likely begin operations by next year. State charter laws schools differ significantly from one another, but all charter schools generally share certain defining features -- charters are:

- are created and managed by groups of parents, teachers and/or others. These schools are tailored to meet the needs of the local community. For example, curricula range from back-to basics, to a more inter-disciplinary approach, to a focus on technology or workplace preparation.
- are public schools. They do not charge tuition, they are open to all students (in every state except New Hampshire), and they are accountable to the public. They are non-sectarian, they abide by health, safety, and civil rights laws, and they are accountable to public authorities.
- are free from most education laws and regulations, but are accountable for results. They gain autonomy through a legal contract with a school district or another public agency. Standards for performance are established in the contract.
- continue to operate only if they meet performance standards, and if they can attract students and their families to the school.
- tend to be smaller schools, where students can have sustained relationships with caring adults. The average charter school has fewer than 300 students.

The charter school debate.

Charter school advocates argue that charter schools open up public schooling to needed innovation, choice, flexibility, and accountability for results. Many proponents also view charter schools as a strategy to capture the best substantive and political arguments of private school voucher advocates - increased choice and competition, more innovation, less regulations -- while making clear that these reforms should be done inside the public school system. They see it as the most dramatic education reform possible while still modifying, rather than dismantling, the public school system.

But charter schools are not free from political controversy or disagreement among educators about their potential benefits. Opponents worry that charter schools will exacerbate inequalities in education, skimming off the most motivated students and families to enroll in charter schools. They also point out that charter schools are untested, and warn against investing substantially in a reform that has not yet been proven.

Because most of the 265 charter schools currently in operation are less than three years old, little evidence exists demonstrating whether or not charter schools improve student achievement: the educational story of charter schools is just beginning. But the debate over charter schools is sharply influenced by longstanding differences in approaches to education reform, partisan politics, and differing attitudes toward teachers' unions.

Politics of charter schools.

The political roots of the charter schools movement are in the Democratic party, but Republicans have appropriated the issue in many states, with several Republican Governors (John Engler, Tommy Thompson, and Bill Weld) now playing the most visible leadership role in promoting charter schools. While some moderate and DLC Democrats are still pushing for charter schools (e.g., California State Senator Gary Hart and Minnesota State Senator Ember Reichgott Junge), the most visible stance from teachers' unions and other Democrats is stiff resistance.

This is a dramatic change from 1988, when Al Shanker brought one form of the idea of charter schools to Minnesota: three years later, Minnesota became the first state to enact a charter schools law. Indeed, of the first 8 states to enact charter laws, 4 of the Governors were Democrats, and 13 out of the 16 legislative assemblies and senates were controlled by Democrats. What happened? Mostly, opposition to charter schools from teachers' unions has intensified, fueled partly by concerns that charter schools will be "union-busters." Indeed, in many states, charter schools are not subject to collective bargaining, and teachers may choose whether or not to join the local union. Union opposition is by no means universal; for example, the nation's first charter school -- City Academy -- was formed by a member of the Minnesota Education Association, Milo Cutter. Cutter has since been asked by the NEA to help other state and local chapters explore the possible development of their own charter schools.

Indeed, there appear to be growing internal divisions within the unions about charter schools. The national unions are cautiously supporting the charter school effort, advocating a "go-slow" effort, as well as charter laws that provide substantially less autonomy to schools than charter advocates would like. The NEA also plans to launch its own charter schools, is and hoping to persuade state chapters of the need for successful, union-sponsored charter schools. The AFT has been a stronger voice for a cautious approach. Al Shanker has expressed the need for greater caution. Most state teachers' unions remain opposed to the charter school concept, though there appears to be divisions between more supportive union staff working on professional development and educational issues and other more skeptical union staff responsible for collective bargaining. Moreover, recent Republican efforts to push school vouchers have led some unions to endorse charter schools as a better alternative that preserves public schooling.

This administration's role in charter schools.

- Start-up grant program. The Administration requested \$20 million for a program to provide start-up funds for charter schools in FY 1995, and \$6 million was appropriated as part of the 1994 reauthorization of the Elementary and Secondary Education Act. The Administration again requested \$20 million in FY 1996; the House appropriations bill provides \$6 million for charter schools, and the Senate Appropriations committee is recommending \$10 million. Grants were recently awarded to 10 states, and two individual schools, for school design and early implementation activities.

This grant program was carefully designed to meet the most pressing need facing charter schools; indeed, a recent survey of charter schools by ECS and the University of Minnesota shows that the most significant obstacle facing charters is lack of access to start-up funds. The program provides grants to states that will make competitive awards to partnerships of public chartering agencies -- such as a school district or public university -- with individual charter school developers. These developers may include teachers, parents, administrators, non-profit organizations, or for-profit firms, and will receive up to three annual start-up grants of \$30,000 to \$70,000 each.

- Other federal funds, including Goals 2000. Moreover, a wide array of federal funds -- including Goals 2000, School-to-Work, and IASA -- may be used by states and communities to support charter schools. Massachusetts, Minnesota, and Michigan, for example, are already using Goals 2000 funds to support the development of charter schools. Moreover, the Secretary will use broad waiver authority provide maximum broad flexibility for charter schools in the use of federal program funds.
- Long-term evaluation of impact of charter schools in student achievement. A \$2 million 4-year contract was recently awarded by the Department for a long-term evaluation of the impact of charter schools on student achievement, as well as the impact on the school systems in which the charters are located.
- Administration efforts to support development of academic standards and assessments. Charter schools often cite the lack of challenging standards and assessments by which they could be measured as a major obstacle to accountability for results. State and local efforts to develop standards and assessments, supported by Goals 2000 and Title 1 funds, will help address this major issue facing charter schools.

Ways to talk about charter schools -- **"Charter schools are a promising new vehicle to raise academic standards, empower educators, involve parents and communities, and expand choice and accountability in public education. They:**

- expand choice in education for all families, providing a safety valve for people dissatisfied with public schools. This would help counter calls for private school vouchers, particularly in places like California where Governor Wilson just announced a private school voucher initiative.
- strengthen community and parental involvement in education, as well as supporting public-spirited entrepreneurialism in education. 90% of charter schools report active parental involvement in the design of the school.
- empower teachers and principals, giving them the opportunity to draw on their talents to design strong schools. Indeed, charter schools can help raise the level of professionalization of teaching.
- symbolize a leaner, more responsive government that catalyzes and supports grass-roots, community initiatives. Charter schools epitomize the shift away from a regulatory, command-and-control approach to government.
- support serious accountability for public schools. Charter schools continue to operate only if they meet performance benchmarks established in a contract, and if they attract students and families to the school. Accountability is also strengthened when there are alternatives to schools not meeting parental expectations or student needs.
- reinforce, and even accelerate, our current education reform efforts. Where school districts don't yet meet local demands for safe and disciplined schools, effective use of technology, or simply high academic standards, charter schools can be developed to strive for these popular goals. Moreover, the presence -- or even the possibility -- of charter schools can create competitive pressure on school districts to accelerate their own reform efforts.



TIPS ON MEETING AMERICAN EDUCATION'S CHALLENGES

EXPANDING PUBLIC SCHOOL CHOICE: STRENGTHENING PUBLIC EDUCATION AS A FOUNDATION OF OUR AMERICAN WAY OF LIFE

This page offers tips on how to expand public school choice and charter schools and improve individual public schools. This is one of the issues that Americans say they want addressed by their schools.

Background: Public charter schools are a promising new vehicle for raising academic standards, empowering educators, involving parents and communities, and expanding choice and accountability in public education. Created and managed by groups of parents, teachers, community groups and others, they can be tailored to meet the needs of a local community. These schools -- now permitted in 20 states -- are public schools freed from most laws and regulations in exchange for accountability for better performance and results. Charter schools are non-sectarian, may not charge tuition, and should be open to all students. Parents and teachers also have additional options for tailoring educational opportunities for children, including public school choice, magnet schools, schools-within-schools, and redesigning and improving individual public schools.

10 Tips to Help Expand Public School Choice and Accountability in Your Community

1. **Families:** Get involved in your children's schools. Find out whether the school is setting high enough academic standards for your child, and whether the school is offering your child the educational opportunities he or she needs to meet the highest standards available in other schools and states. Get together with other families, teachers, community groups, school district staff, and the school's principal to begin to make improvements in your child's school. Join an existing school improvement committee, or help form a new one.
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3. **Families:** If you are shopping around for a public school, write a list of key elements you desire in your child's education. Develop a set of questions you want to ask about the educational opportunities provided by a school for your child. Visit schools, sit down with the principal, stop in classrooms, and talk to teachers and parents at that school.
4. **Families, teachers, principals, and community organizations:** If existing schools don't meet your expectations, consider applying for a charter to create a new public school or convert an existing public school to "charter" status. Twenty states now permit teachers and others to form public charter schools, providing them with public funds and dramatic flexibility to custom-make a local school, while holding the school accountable for results. For a list of states, and people to contact in your state for further information, call 1-800-USA-LEARN.
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6. **School boards and states:** Review regulations and red tape and eliminate any that get in the way of schools trying to meet the needs of their students and help them meet challenging local and state standards. Provide assistance to all schools to enhance the quality of teaching and raise levels of learning for all students. Help regular public schools and public charter schools to improve and help them develop reliable performance standards by which schools are held accountable.
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process for reviewing applications for charter schools, and approve those that will have sound fiscal management and real promise to help all children learn. Ensure that transportation is available for students seeking to attend other public or charter schools. Provide adequate autonomy for charter and other public schools. Host conferences or seminars on charter school issues for potential applicants, existing charter schools, and their community partners. Raise awareness and conduct outreach to inform people of opportunities to form charter schools.

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10. **Families, teachers, principals, community organizations, colleges, and universities:** Think about other critical issues in creating a school that improves teaching and learning for all. These include: decide that you are prepared to invest the time and energy needed; develop a consensus on your goals and vision for the school; decide if you want your school to have a specialized educational focus such as math and science, foreign languages, the arts, or preparation for the workplace; talk to and visit others involved in high-performing schools or who have successfully started a charter or magnet school; discuss what will be the nature of your curriculum, how time within the school day will be organized, how student learning will be assessed, where the school will be located if it is a new school, what will be the governance structure of the school, and by what performance measures the school will be held accountable.

Selected Resources: Contact one of the national organizations listed below for additional information and ideas to consider as you develop a charter school. Or call 1-800-USA-LEARN for a list of states with charter school laws, and contact names and telephone numbers in your state. And contact your local school district or state board of education for additional information.

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Center for School Change
Humphrey Institute, University of Minnesota
301 19th Avenue South
Minneapolis, MN 55455
Tel: 612-626-1834
E:mail: Natha001@maroon.tc.umn.edu

Charter Schools Strategies, Inc. (CSSI)
210 West Grant Street, Suite 321
Minneapolis, MN 55403-2244
Tel: 612-321-9221
Fax: 612-672-0244
E:mail: Charter SSI@aol.com

RPP International
2200 Powell Street, Suite 250
Emeryville, CA 94608
Tel: 510-450-2550, 510-843-8574
E:mail: Rppintl.@aol.com

U.S. Department of Education
Information Resource Center
600 Independence Ave, SW
Washington, DC 20202-0498
1-800-USA-LEARN (1-800-872-5327)
(Or in D.C. call 202-401-2000)



**U.S. Department of Education
Office of the Deputy Secretary
600 Independence Avenue, S.W.
Washington, D.C. 20202**

DATE : 2/29/96

TO: Bruce Reed

ORGANIZATION: WM. DPC

PHONE : _____ FAX : 456-5557

FROM : Jon Schnur

PHONE : 401-3598 FAX : 401-3093

Total Pages (including cover): 23

MESSAGE :

(first 8 are on charter schools
the rest is ~~the~~ the
Secretary's speech.)

Bruce -

Here are the materials you asked
for. Enjoyed talking to you today.
Talk to you soon,

Jon Schnur

To: Bruce Reed
From: Jon Schnur
Date: February 29, 1996
Re: Follow-up to our phone conversation today

Good talking to you today! Attached is more information than you might care to see on charter schools. But if you want more, let me know. The documents are:

- 1) A one-pager discussing strong and weak laws, and listing all states with charter school laws.
- 2) A simple list of states with charter laws. The two lists are identical, but I thought you might want a sheet you could copy and give to others. The first one-pager contains discussion you probably won't want to circulate widely.
- 3) A three-page background memo on charter schools. This has gone to Secretary Riley, and (I believe) to the President.
- 4) A two page sheet of "tips" on public school choice and charter schools that was given to all who attended downlink sites for the Secretary's "State of American Education" speech. This was part of a larger packet of tips on eight different areas, including technology, standards, and safe schools. Many of these tips were published in a box along yesterday's USA Today article.
- 5) The Secretary's "State of American Education" speech.

A few other quick comments. As you think about sites for an event, I would say the very best states to highlight would be Minnesota, California, or Colorado. Most of the others states wouldn't be bad, but New Hampshire and Michigan probably are too controversial. I'd be happy to give you more info on any of these states.

Also, Frank Holleman suggested that I submit a formal scheduling request for the President to address the California state charter schools conference, being held March 21-23. It is the nation's largest conference on charter schools this year, with 400 people attending, and Pete Wilson will likely address the group on the second day. Conference organizers would make virtually any time on those three days for us; we are also exploring the possibility of Secretary Riley speaking to the conference. This would be a great forum for an announcement of a charter schools initiative, but I realize the President is unlikely to travel to California simply for this event. Unless you think it's totally unnecessary, we'll probably submit a request Monday.

Finally, Secretary Riley will host a satellite town meeting on charter schools on March 19th, at 8:30pm. We will have downlink sites with interested charter school people around the nation, and we will have guests from Minnesota, California, and Colorado. We will adapt a 10-15 minute video on charter schools from this program, combining it with footage of the Secretary in a Minnesota charter school last month. I am assuming that you would not be interested in trying to get the President to participate, but it would be great to get footage of the President in the charter schools video we produce. The best way is probably for us to get footage whenever the President makes the charter schools announcement.

Enjoy the reading, and please let me know if there's anything else I can do to help. My direct line is 401-3598. See you soon.

DISCUSSION ON STRONG AND WEAK CHARTER SCHOOL LAWS

Below is a list of states with charter school laws. Charter school advocates divide laws into "strong" and "weak" laws, and each category is explained briefly below. I have underlined the name of each state with a law that is considered "strong" by charter advocates.

It would be too simplistic to say that all strong charter laws are good laws; for example, New Hampshire probably goes too far, permitting charter schools to be selective based on aptitude, achievement, or other criteria that are not necessarily even made clear to applicants. Because charter schools tend to appear in states with strong laws, however, the creation of a significant number of charter schools probably depends on the enactment of strong laws. But it will be important for these laws to require charter schools to be public -- open to all students, not charging tuition, and non-sectarian. It will also be important that these laws maintain strong mechanisms to hold charter schools accountable to high standards; after all, a major purpose of the charter schools movement is to boost accountability in public schools.

"Strong" laws provide considerable autonomy to charter schools, and allow an institution other than the school board to grant a charter, or at least to hear an appeal of a school board rejection of a charter application. The state board of education usually plays this role, though a few states permit public colleges and universities to play this role (Minnesota, Michigan), one created a new state board for charter schools (Arizona), and another authorizes only the Governor's appointed Secretary of Education to approve charter applications (Massachusetts). Most "strong" laws also provide blanket waivers from most state laws and regulations for approved charter schools.

"Weak" laws provide less autonomy for charter schools, and usually permit only school boards to grant charters. Many groups, including teacher unions and school boards, prefer this kind of law. They -- and others -- worry that "strong" laws will cause charter schools to be too independent of the public school system. Weak laws tend to provide waivers only upon request, and then only of individual provisions that the school would like to see waived. It is conceivable that stronger leadership from school boards and superintendents could lead to more charter schools in weak-law states. Again, states with "strong" laws are underlined.

Alaska

Arizona

Arkansas

California

Colorado

Delaware

Georgia

New Jersey

New Mexico

Rhode Island

Texas

Wisconsin

Wyoming

Hawaii

Kansas

Louisiana

Massachusetts

Michigan (But very controversial)

Minnesota

New Hampshire (But quite problematic. Please see above discussion.)

While New York does not have a charter law, New York City has established "New Visions" schools that resemble charter schools in many ways. Oregon also receives federal charter schools funding, citing authority under their education reform law to establish charter schools.

STATES WITH CHARTER SCHOOL LAWS

(as of 2/96)

Alaska
Arizona
Arkansas
California
Colorado
Delaware
Georgia
Hawaii
Kansas
Louisiana
Massachusetts
Michigan
Minnesota
New Hampshire
New Jersey
New Mexico
Rhode Island
Texas
Wisconsin
Wyoming

BRIEFING MEMO ON CHARTER SCHOOLS

Since 1991, 20 states have enacted laws permitting the establishment of charter, or independent public, schools. About 265 charter schools have opened their doors, and most of these are in six states: California, Minnesota, Michigan, Colorado, Arizona, and Massachusetts. Well over 100 other schools will likely begin operations by next year. State charter laws schools differ significantly from one another, but all charter schools generally share certain defining features -- charters are:

- are created and managed by groups of parents, teachers and/or others. These schools are tailored to meet the needs of the local community. For example, curricula range from back-to basics, to a more inter-disciplinary approach, to a focus on technology or workplace preparation.
- are public schools. They do not charge tuition, they are open to all students (in every state except New Hampshire), and they are accountable to the public. They are non-sectarian, they abide by health, safety, and civil rights laws, and they are accountable to public authorities.
- are free from most education laws and regulations, but are accountable for results. They gain autonomy through a legal contract with a school district or another public agency. Standards for performance are established in the contract.
- continue to operate only if they meet performance standards, and if they can attract students and their families to the school.
- tend to be smaller schools, where students can have sustained relationships with caring adults. The average charter school has fewer than 300 students.

The charter school debate.

Charter school advocates argue that charter schools open up public schooling to needed innovation, choice, flexibility, and accountability for results. Many proponents also view charter schools as a strategy to capture the best substantive and political arguments of private school voucher advocates - - increased choice and competition, more innovation, less regulations -- while making clear that these reforms should be done inside the public school system. They see it as the most dramatic education reform possible while still modifying, rather than dismantling, the public school system.

But charter schools are not free from political controversy or disagreement among educators about their potential benefits. Opponents worry that charter schools will exacerbate inequalities in education, skimming off the most motivated students and families to enroll in charter schools. They also point out that charter schools are untested, and warn against investing substantially in a reform that has not yet been proven.

Because most of the 265 charter schools currently in operation are less than three years old, little evidence exists demonstrating whether or not charter schools improve student achievement: the educational story of charter schools is just beginning. But the debate over charter schools is sharply influenced by longstanding differences in approaches to education reform, partisan politics, and differing attitudes toward teachers' unions.

Politics of charter schools.

The political roots of the charter schools movement are in the Democratic party, but Republicans have appropriated the issue in many states, with several Republican Governors (John Engler, Tommy Thompson, and Bill Weld) now playing the most visible leadership role in promoting charter schools. While some moderate and DLC Democrats are still pushing for charter schools (e.g., California State Senator Gary Hart and Minnesota State Senator Ember Reichgott Junge), the most visible stance from teachers' unions and other Democrats is stiff resistance.

This is a dramatic change from 1988, when Al Shanker brought one form of the idea of charter schools to Minnesota: three years later, Minnesota became the first state to enact a charter schools law. Indeed, of the first 8 states to enact charter laws, 4 of the Governors were Democrats, and 13 out of the 16 legislative assemblies and senates were controlled by Democrats. What happened? Mostly, opposition to charter schools from teachers' unions has intensified, fueled partly by concerns that charter schools will be "union-busters." Indeed, in many states, charter schools are not subject to collective bargaining, and teachers may choose whether or not to join the local union. Union opposition is by no means universal; for example, the nation's first charter school -- City Academy -- was formed by a member of the Minnesota Education Association, Milo Cutter. Cutter has since been asked by the NEA to help other state and local chapters explore the possible development of their own charter schools.

Indeed, there appear to be growing internal divisions within the unions about charter schools. The national unions are cautiously supporting the charter school effort, advocating a "go-slow" effort, as well as charter laws that provide substantially less autonomy to schools than charter advocates would like. The NEA also plans to launch its own charter schools, is and hoping to persuade state chapters of the need for successful, union-sponsored charter schools. The AFT has been a stronger voice for a cautious approach. Al Shanker has expressed the need for greater caution. Most state teachers' unions remain opposed to the charter school concept, though there appears to be divisions between more supportive union staff working on professional development and educational issues and other more skeptical union staff responsible for collective bargaining. Moreover, recent Republican efforts to push school vouchers have led some unions to endorse charter schools as a better alternative that preserves public schooling.

This administration's role in charter schools.

- Start-up grant program. The Administration requested \$20 million for a program to provide start-up funds for charter schools in FY 1995, and \$6 million was appropriated as part of the 1994 reauthorization of the Elementary and Secondary Education Act. The Administration again requested \$20 million in FY 1996; the House appropriations bill provides \$6 million for charter schools, and the Senate Appropriations committee is recommending \$10 million. Grants were recently awarded to 10 states, and two individual schools, for school design and early implementation activities.

This grant program was carefully designed to meet the most pressing need facing charter schools; indeed, a recent survey of charter schools by ECS and the University of Minnesota shows that the most significant obstacle facing charters is lack of access to start-up funds. The program provides grants to states that will make competitive awards to partnerships of public chartering agencies -- such as a school district or public university -- with individual charter school developers. These developers may include teachers, parents, administrators, non-profit organizations, or for-profit firms, and will receive up to three annual start-up grants of \$30,000 to \$70,000 each.

- Other federal funds, including Goals 2000. Moreover, a wide array of federal funds -- including Goals 2000, School-to-Work, and IASA -- may be used by states and communities to support charter schools. Massachusetts, Minnesota, and Michigan, for example, are already using Goals 2000 funds to support the development of charter schools. Moreover, the Secretary will use broad waiver authority provide maximum broad flexibility for charter schools in the use of federal program funds.
- Long-term evaluation of impact of charter schools in student achievement. A \$2 million 4-year contract was recently awarded by the Department for a long-term evaluation of the impact of charter schools on student achievement, as well as the impact on the school systems in which the charters are located.
- Administration efforts to support development of academic standards and assessments. Charter schools often cite the lack of challenging standards and assessments by which they could be measured as a major obstacle to accountability for results. State and local efforts to develop standards and assessments, supported by Goals 2000 and Title 1 funds, will help address this major issue facing charter schools.

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Humphrey Institute, University of Minnesota
301 19th Avenue South
Minneapolis, MN 55455
Tel: 612-626-1834
E:mail: Natha001@maroon.tc.umn.edu

Charter Schools Strategies, Inc. (CSSI)

210 West Grant Street, Suite 321
Minneapolis, MN 55403-2244
Tel: 612-321-9221
Fax: 612-672-0244
E:mail: CharterSSI@aol.com

RPP International

2200 Powell Street, Suite 250
Emeryville, CA 94608
Tel: 510-450-2550, 510-843-8574
E:mail: Rppintl.@aol.com

U.S. Department of Education

Information Resource Center
600 Independence Ave, SW
Washington, DC 20202-0498
1-800-USA-LEARN (1-800-872-5327)
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