

## MEMORANDUM

TO: TOM FREEDMAN  
FROM: JULIE MIKUTA  
RE: CHARTER SCHOOLS  
DATE: NOVEMBER 3, 1997

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### SUMMARY

Here is an overview of the major obstacles to charter school development. Charter schools certainly need more capital, and the plan you discussed would address this point. You mentioned that the allocation of funds would be based on demand for the schools (or did I misunderstand this point?). Even where a charter school group is able to establish that the demand exists, there are other barriers which may prevent its opening a school. These are described below.

### I. START-UP PROBLEMS OF CHARTER SCHOOLS

This information is drawn from the Charter Schools in Action report published by the Hudson Institute, and the recent study done by the Department of Education (*A Study of Charter Schools: First-Year Report*).

- A. *Political and bureaucratic opposition to the school's establishment.* The Department of Education study found that 46% of charter schools report that political resistance from the school board, district and union opposition, bargaining agreement arrangements, etc. created a "difficult" or "very difficult" barrier to the school's creation. The Hudson Institute found the problem to be even worse, as it looked at would-be charters that never got started while the Department of Education did not. Some of these problems are created at the state level, and others at the local level. State issues include bad charter school laws, inadequate funding formulae, and onerous application procedures. The locally created problems often force charters to "run a fearsome political gauntlet" before opening involving controlling superintendents, jealous school boards, and opposing unions. A lot of would-be schools don't get past these barriers.

I mention this issue because it is a big reason why more schools haven't opened, although it is difficult to see how the federal government can directly help to solve it. This point also includes the artificial "caps" that some states place on the number of schools that can be opened, and quotas that dictate that certain numbers of schools must locate in particular areas or serve specified categories of students.

- B. *Facility woes.* Facility problems top the list of fiscal difficulties. Charter schools have problems finding a site, obtaining use of it, paying for it, renovating it, getting all the requisite approvals and permits, etc. In Massachusetts, the state Financial Development Agency has helped at least 2 charter schools gain access to former state (or federal) facilities that were unused. Other states do not have similar loan facilities in place, making it very difficult for the start-up schools.

This could be a need that the federal government addresses.

- C. *A late, rushed frantic start* Many charters open without enough planning, especially when the charter is approved only months before the school is to open. I mention this point because some charter schools build a year of planning into their timeline. The schools that take the year certainly need start-up funding to stay alive during that year. But, schools that receive federal support may not open for a year after they receive it.
- D. *Lack of business acumen and managerial competence.* Is there any way that the federal government can encourage persons with expertise in these areas to help out charter schools?

## II. FEDERAL POLICY ISSUES

### A. *Federal Funds*

Charter schools routinely do not get their share of federal money from programs such as Title I and the Individuals with Disabilities Act (IDEA) due to the complexity of the process of obtaining these funds. The schools are missing out on significant funds that they are entitled to receive.

#### *Why charter schools do not receive these funds*

1. The allocation formulas are geographically based. What is needed is a way to determine how many "census poverty" students attend charter schools, and which schools those children left (so that their funding levels are reduced accordingly). Alternatively, many charter school proponents would like to see the funding formulas changed so that the money follows the child. The Congressional Research Service has written a memo which suggests a statutory fix for the allocation formulas.

Additionally, Title I funds are distributed based on the previous year's population of disadvantaged students. This means that most charter schools are ineligible for the funds until their second year. Massachusetts has negotiated an exception that allows it to base Title I funding on anticipated enrollments.

2. Charter schools receive federal categorical funds through the state, and often, also the local education authorities. Sometimes the funds don't find their ways to the charter schools due to hostility or incompetence at either or both of these levels.
3. Charter schools often do not have an in-house expert on how to fill out all the forms.

#### *Activity at the Federal Level*

According to the Hudson Institute Report, there has been some activity at the federal level. The House Committee on Education and the Workforce has recently held hearings that probed this issue. The Congressional Research Service has written a memo on how the programs could be amended to correct the problem. The GAO is doing a study on the issues of program participation and funding equity.

#### *Federal funding of start-up expenses*

The Public Charter Schools Program was included in the Improving Schools Act of 1994. It was funded at \$51 million for FY'97. The average grant size is \$35,000. President Clinton requested a doubling of the budget for FY'98. If approved, the grant size is anticipate to increase to \$80,000.

### *Small Programs*

Charter schools also often do not have the expertise-- or the director's time-- to apply for small federal programs such as the Eisenhower math/science program.

### **B. Regulatory Concerns**

Based on the interviews conducted for its report, the Hudson Institute disagrees with the Department of Education's claim that federal regulations are not a major barrier to the launch of charter schools. Some of the federal regulations can be waived-- however, again the lack of staff time and expertise has created a situation in which the paperwork never gets done.

## **MEMORANDUM**

**TO: TOM FREEDMAN, MICHAEL COHEN**

**CC: ELENA KAGAN**

**FROM: JULIE MIKUTA**

**RE: SAN DIEGO'S CHARTER SCHOOLS**

**DATE: JUNE 12, 1997**

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### **SUMMARY**

San Diego has eight functioning charter schools (as of 1/10/97), which is more than any other district in California except LA (see attached list of schools). President Clinton spoke at O'Farrell Community School on 9/22/95 (see attached description of O'Farrell). He praised it and schools like it as "the envy of a nation" [San Diego Union-Tribune, 9/23/95].

### **SUPPORT/ OPPOSITION WITHIN CALIFORNIA**

Gov Wilson is very supportive of charter schools. In 1992, he signed legislation allowing for up to 100 of California's 7,700 public schools to convert to charter school status.

Teachers' unions have been in adamant opposition to charter schools.

In May, 1996, Gov Wilson endorsed six pending bills that would raise or abolish the cap on the number of charter schools and allow entire school districts to propose local charters.

### **STATE SURVEY OF CHARTER SCHOOLS CITED 3 IN SAN DIEGO AS GOOD EXAMPLES**

A report done by the Little Hoover Commission, a state watchdog agency, cited these San Diego charter schools as good examples: Darnall E-Campus; O'Farrell Community School; and Academy High School in Vista. The Charter School of San Diego was mentioned for targeting students who are not doing well in the regular school system [San Diego Union-Tribune, 3/8/96].

O'Farrell is recognized as one of the most innovative and successful middle-level schools in the country [Vice-President, Board of Education, San Diego Unified School District in Letter to Editor, San Diego Union-Tribune, 10/12/95].

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## San Diego County Office of Education

# San Diego County Charter Schools

Following is a list of the charter schools in San Diego County.  
For information on how to start a charter school, please call Carol Pugmire, Assistant Superintendent, Instructional Support Services at (619) 292-3645.

| CDE# | San Diego Unified                                                                                             | Contact: Roxie Knupp<br>293-8024                                               |
|------|---------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| 28   | Charter School of S.D.<br>1807 Robinson Avenue, Suite<br>250<br>San Diego CA 92103                            | Principal: Mary Bixby<br>686-6666<br>by State: 9/10/93                         |
| 33   | Darnall E-Campus<br>6020 Hughes St.<br>San Diego C 92115-6520                                                 | Principal: Robin Stern<br>582-1822<br>Approved by State: 9/10/93               |
| 46   | Harriet Tubman Village Sch.<br>6880 Mohawk St.<br>San Diego CA 92114                                          | Principal: Roger Sciarretta<br>223-6196<br>Approved by State: 1/14/94          |
| 48   | O'Farrell Community Sch.<br>6130 Skyline Dr.<br>San Diego CA 92114                                            | Principal: Bob Stein<br>263-3009<br>Approved by State: 2/10/94                 |
| 95   | School of Success<br>Kindergarten Academy<br>3025 Fir Street<br>San Diego CA 9210281                          | Principal Vivian A. Brown<br>239-0632<br>Approved by State: 11/8/95            |
| 81   | The Museum School<br>200 West Island Avenue<br>San Diego CA 92101                                             | Museum Dir/Principal:<br>Robert Sain<br>233-8796<br>Approved by State: 4/14/95 |
| 96   | Memorial Academy for<br>International<br>Baccalaureate Preparation<br>2850 Logan Avenue<br>San Diego CA 92113 | Principal: Marco Curiel<br>525-7400<br>Approved by State: 11/8/95              |
| CDE# | Bonsall Union School District                                                                                 | Contact: Kim Marshall<br>631-5200                                              |
| 104  | Vivian Bank Charter School<br>31505 Old River Road<br>Bonsall CA 92003                                        | Principal: Barbara Rohrer<br>631-5233<br>Approved by State: 1/12/96            |
| CDE# | Chula Vista Elementary                                                                                        | Contact: Dennis Doyle<br>425-9600                                              |
| 54   | Discovery School<br>1100 Camino Biscay<br>Chula Vista CA 91911                                                | Principal: Fred Elliott<br>656-0797<br>Approved by State: 6/13/94              |

|             |                                                                                                                                      |                                                                                               |
|-------------|--------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| 68          | Clear View School<br>455 Windrose Way<br>Chula Vista CA 91910                                                                        | <b>Principal: Leslie Woldt</b><br>498-3000<br>Approved by State: 10/14/94                     |
| 64          | Mueller School<br>7151 I Street<br>Chula Vista CA 91910                                                                              | <b>Principal: William Collins</b><br>422-6192<br>Approved by State: 9/9/94                    |
| <b>CDE#</b> | <b>Lakeside Union School District</b>                                                                                                | <b>Contact: Carol Leighty</b><br><b>390-2611</b>                                              |
| 112         | River Valley High School<br>c/o Lakeside Union District<br>Office<br>12335 Woodside Avenue<br>P.O. Box 578<br>Lakeside CA 92040-0578 | <b>Director: AnnMarie Wellhouse</b><br>478-2148<br>Approved by State: 4/10/97                 |
| <b>CDE#</b> | <b>Escondido Union High</b>                                                                                                          | <b>Contact: Jayme Arner</b><br><b>480-3024</b>                                                |
| 109         | Escondido Charter High School<br>302 N. Midway Drive<br>Escondido CA 92027-2741                                                      | <b>Principal: Denny Snyder</b><br>737-3154<br>Approved by State: 2/9/96                       |
| <b>CDE#</b> | <b>Vista Unified</b>                                                                                                                 | <b>Contact: Pete McHugh</b><br><b>726-2170, ext. 2214</b>                                     |
| 50          | Guajome Park Academy<br>2000 North Sante Fe Ave.<br>Vista CA 92083                                                                   | <b>Cheif Educational Officer: Sandra Williamson</b><br>631-7482<br>Approved by State: 5/13/94 |
| --          | Windows School (satellite)<br>2000 N. Santa Fe Avenue<br>Vista CA 92083                                                              | <b>462-0165</b>                                                                               |

For additional information, please contact Carol Pugmire, Assistant Superintendent, Learning Resources and Educational Technology at 292-3645 or Jack Tierney, Planning & Assessment Manager at 292-3815, San Diego County Office of Education.

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**URL: <http://www.sdcoe.k12.ca.us/iss/charter.html>**



# Welcome to O'Farrell Community School!

We are one of only three charter schools in the San Diego Area. This cutting edge approach to education is just part of who we are. Explore this presentation and give us [feedback](#).

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O'Farrell Resource Page - - Student work and interesting places to see on the Web!

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***The Mission  
& Philosophy***

***The O'Farrell  
Community***

***Interesting  
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***Partnerships***

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## The Mission and Philosophy

O'Farrell serves about 1400 sixth, seventh and eighth grade students. Our mission statement came from a planning retreat of teachers, administrators, parents and community groups that met in August 1989:

*O'Farrell Community School: Center for Advanced Academic Studies will promote excellence by providing all middle level students a single, academically enriched curriculum within a multiethnic, student-centered environment. The mission of the school is to attend to the social, intellectual, psychological and physical needs of middle level youth so they will become responsible, literate, thinking and contributing citizens.*

The school is structured into teaching teams known as Educational Families. Teachers are empowered to provide leadership in school operations, curriculum development and long range planning. There is no tracking. The school practices full inclusion of students identified with Special Education (LH) or English as Second Language (ESL) needs. Our goal is to prepare all students for high school college prep classes. O'Farrell became California's forty-eighth charter school in February, 1994.

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## Families

The structure of the school has been modified to support its mission. Students are assigned to Educational Families. An Educational Family is composed of 150 students and six teachers. In the school, three families serves sixth grade students and six families serve seventh and eighth grade students. Each Educational Family has a teacher designated as a Family Leader, who is responsible for the day-to-day operation of the family. Students attend class with teachers in their Educational Family all day except for a 50-minute Discovery class.

**Family A | Family B-1 | Family B-2 | Family C | Family D |**  
**Family E-1 | Family F | Family G | Family H | Family I |**  
**The O'Farrell Music Program within the Discovery Family |**

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# THE Center for Education Reform



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## Charter School Highlights and Statistics

### ☀ Charter School Laws That Offer Real Autonomy:

Arizona (1994), California (1992), Colorado (1993), Delaware (1995), District of Columbia (1996), Florida (1996), Louisiana (1995), Massachusetts (1993), Michigan (1993), Minnesota (1991), New Jersey (1996), North Carolina (1996), Texas (1995).

### ☀ Charter School Laws In Need of Improvement:

Alaska (1995), Arkansas (1995), Connecticut (1996), Georgia (1993), Hawaii (1994), Illinois (1996), Kansas (1994), New Mexico (1993), New Hampshire (1995), Rhode Island (1995), South Carolina (1996), Wisconsin (1993), Wyoming (1995).

### ☀ Charter Schools in Operation as of Fall, 1996:

Alaska: 3  
Arizona: 164  
California: 109  
Colorado: 32  
Delaware: 2  
District of Columbia: 1  
Florida: 6  
Georgia: 10  
Hawaii: 2  
Illinois: 1  
Louisiana: 3  
Massachusetts: 22  
Michigan: 76  
Minnesota: 19  
New Mexico: 5  
Texas: 16  
Wisconsin: 9

**Total: 480**

Updated 11/18/96, from CER's National Charter School Directory, 3rd Edition.

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# The Schools Online:

www.edexcellence.net/  
chart/chart1.html

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|                | N.Mexico    | S.CAROLINA | TEXAS      | WISCONSIN   | CANADA   |

### Alaska

- [Aquarian Educational Academy](#) (k-6, Anchorage, Alaska)

### Arizona:

- [Foothills Academy](#) (6-12, Phoenix, AZ)

### California: CANEC

- [Buckingham CHarter School](#) (Vacaville, CA)
- [California Distance Learning Program](#) (k-8, Ready Springs CS Affil., CA)
- [Bellevue Santa-Fe Charter School](#) (k-6, San Luis Obispo, CA)
- [Independent School](#) (Castro Valley, CA)
- [Horizon Instructional Systems](#) (Lincoln, CA)
- [Garfield Charter School](#) (Menlo Park, CA)
- [Independent School](#) (Castro Valley, CA)
- [Golden Feather Charter School](#) (Feather River Canyon?, CA)
- [Sonoma Charter School](#) (k-8, Sonoma Valley?, CA)
- [O'Farrell Community School](#) (6-8, San Diego, CA)
- [La Jolla High School?](#) (9-12, La Jolla/San Diego, CA)
- [San Carlos Charter Learning Center](#) (4-6, San Carlos, CA)
- [Charter Community School Home Page](#) (Placerville, CA)
- [The Los Angeles Open Charter School](#) (ages 6-12, LA, CA)
- [Palisades Charter High School](#) (Pacific Palisades, CA)
- [The Charter School of San Diego](#) (6-12, San Diego, CA)
- [Linscott Charter Elementary School](#) ("staying tuned")
- [Community Learning Center](#) (7-12, Bakersfield, California)
- [HomeTech Charter School](#) (3-9, Paradise, California)

+ Delaware  
Missouri  
VA  
WA  
OR  
OHIO  
NY (Bill?)  
NJ  
NH

**Colorado: <http://www.cde.state.co.us/charter.htm>**

- [EXCEL School](#) (6-10, Durango, CO)
- [Community of Learners](#) (6-8, Durango, CO).
- [Academy Charter School](#) (k-7, Castle Rock, CO)
- [Academy of Charter Schools](#) (k-12, Thornton, CO)
- [Battle Rock Charter School](#) (k-6, Cortez, CO)
- [Clayton Charter School](#) (pre-3, Denver, CO)
- [Community Involved Charter School](#) (k-12, Lakewood, CO)
- [Core Knowledge Charter School](#) (k-6, Parker, CO)
- [Eagle County Charter Academy](#) (5-7, Avon, CO)
- [Jefferson Academy](#) k-6, Broomfield, CO)
- [Pueblo School for the Arts and Sciences](#) (k-9, Pueblo, CO)
- [Sci-tech Academy](#) (k-12, Littleton, CO)
- [Stargate School](#) (1-5, Eastlake, CO)
- [The Connect School](#) (6-8, Pueblo, CO)
- [Community Prep School](#) (9-12, Colorado Springs, CO)
- [Denver Youth Academy](#) (7-8, Denver, CO)
- [EXCEL Academy](#) (k-6, Arvado, CO)
- [GLOBE Charter School](#) (k-12, Colorado Springs, CO)
- [P.S.1](#) ('all ages', Denver, CO)
- [Renaissance School](#) (k-6, Parker, Co)
- [Spring Community School](#) (k-5, Montrose, CO)
- [Thurgood Marshall Charter Middle School](#) (6-8, Denver, CO)
- [The Colorado Springs--Edison Charter School](#) (k-5, Colorado Springs, CO)
- [Summit Middle School](#) (6-8, Boulder Valley, CO)

**Florida: <http://www.firn.edu/doe/bin00038/status.htm>****Georgia**

- [Addison Elementary School home page](#) (Marietta, GA)

**Hawaii**

- [The Lanikai School](#) (k-6, Lanikai, HA)

**Massachusetts: <http://info.doe.mass.edu/./cs.profile.index.html>**

- [Academy of the Pacific Rim](#) Charter School (6-8, Brookline, MA)
- [Atlantis Charter School](#) (k-5, Fall River, MA)
- [Benjamin Banneker](#) Charter School (3-6, Cambridge, MA)
- [Benjamin Franklin](#) Classical Charter School (k-4, Franklin, MA)
- [Boston Renaissance](#) Charter School (k-5, Boston, MA)
- [Cape Cod Lighthouse](#) Charter School (6-8, Orleans, MA)
- [Chelmsford](#) Charter School (5-8, Chelmsford, MA)
- [City On A Hill](#) Charter School (9-10, N.E. Univ., MA)
- [Community Day](#) Charter School (k-6, North Lawrence, MA)
- [Francis Parker](#) Charter School (7-8, Fort Devens, MA)

- [Hilltown Cooperative Charter School](#) (k-4, Williamsburg, MA)
- [Lawrence Family Development Charter School](#) (k-3, North Lawrence, MA)
- [Lowell Middlesex Academy Charter School](#) (9-12, Middlesex, MA)
- [Marblehead Community Charter School](#) (5-7, Marblehead, MA)
- [Martha's Vineyard Charter School](#) (ages 10-16, Martha's Vineyard, MA)
- [Neighborhood House Charter School](#) (k-2, Dorchester, MA)
- [North Star Academy Charter School](#) (9-12, Springfield, MA)
- [SABIS International Charter School](#) (9-12, Springfield, MA)
- [South Shore Charter School](#) (k-12, Hull, MA)
- [YouthBuild Boston Academy Charter School](#) (9-12, Roxbury, MA)

**Michigan:** <http://charter.ehhs.cmich.edu/html/profile.html>

- [Renaissance Public School Academy](#) (5-8, Mt. Pleasant, MI)
- [Academy of Detroit Charter Schools](#) (Detroit area, MI)
- [Henry Ford Academy of Manufacturing Arts & Sciences](#)
- [Hannahville Indian School](#) (k-12)
- [Concord Academy](#) (k-8, Petoskey, MI)
- [Horizons Community High School](#) (Wyoming, Michigan)

## Minnesota

- [St. Paul Family Learning Center](#) (k-4, St. Paul, MN)
- [Toivola-Meadowlands Charter School](#) (k-12, Meadowlands, MN)
- [Minnesota New Country School](#) (7-12, Le Sueur, MN)

## South Carolina

- [The Lighthouse Charter School](#) (Hilton Head Island, SC)

## Texas

- [Renaissance Charter School](#) (Beltline-Irving, TX)
- [Kirby Hall School](#) (k-12, Austin, TX)

## Wisconsin

- [Madison Middle School 2000](#) (Madison, WI)

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this page was last updated on 1/12/97...

# Charter Schools in Action: What Have We Learned?

Executive Summary, July 1996

by **Chester E. Finn Jr., Bruno V. Manno and Louann A. Bierlein**  
**Hudson Institute, Educational Excellence Network, Washington, DC**

This report contains the findings of the first year of a two-year Hudson Institute study of U.S. charter schools, focusing on their start-up problems, solutions to those problems, and the policy environments in which such schools are most apt to thrive or falter. Field work in 1995-96 consisted of site visits to 43 charter schools in seven states and the gathering of substantial data on 35 of those schools, which comprise a cross-section of the approximately 225 charter schools operating during this year. The three-person research team conducted approximately 600 school-linked interviews and some 107 more with state-level people. The result is the most extensive information presently available about the nationwide charter school movement.

This summary briefly recaps key findings and recommendations but does not substitute for the full report. It tracks the five major sections of the report, which also includes several appendices, including profiles of schools and states included in the 1995-96 sample.

## 1: Introduction and Overview

- Students attending charter schools are diverse; 63 percent of the nearly 8,400 students in our sample are minority group members. The numbers of boys and girls are almost equal.
- Eighty-one percent had been enrolled in public schools immediately before coming to the charter schools, 8 percent came from private schools, 2 percent were home-schooled, and 4 percent had dropped out of school.
- The charter movement in the United States has spread rapidly. Twenty-five states and the District of Columbia now have charter laws. The country may have as many as 350 functioning charter schools in 1996-97.
- Some, however, barely qualify for the designation. We have seen examples of "charter" schools that remain subordinate to district administrations and school boards in many important matters.

## 2: Charter School Accomplishments

- Charter school founders are a varied band of parents, laymen, professionals, and organizations. The schools are educationally diverse and remarkably imaginative in their approaches. They include schools for at-risk youngsters and special populations, "distance learning" (or "virtual" schools), teacher cooperatives, and contract-managed schools, as well as many other educational and organizational innovations.
- Students, many of whom had been unsuccessful and unhappy in other schools, seem generally satisfied with the education they are receiving, citing especially the charter schools' clear academic expectations, safety, individualized instruction, committed teachers, and family-like atmosphere.
- Charter schools are attracting terrific, often unconventional teachers, who fulfill many other functions within the schools. Teachers expressed particular satisfaction with their freedom to teach, the school's autonomy, its familial atmosphere, sensible management decisions, dedicated colleagues, and enhanced institutional and personal accountability.
- Parent and student satisfaction is manifest in a number of ways, including the fact that nearly all charter schools have pupil waiting lists. There is evidence of much parent involvement, and parents say that they feel welcome in charter schools and that the schools are responsive to their concerns. (Many charter schools were begun by parents.) Other reasons for parent satisfaction are related to high student

schools were begun by parents.) Other reasons for parent satisfaction are related to high student expectations and the schools' coherent curriculum, minimal bureaucracy, dedicated teachers, and family-like atmosphere.

- Though local superintendents and school boards are most frequently hostile to charter schools, some find promise in them because of the student needs they meet, especially for at-risk youngsters; the competitive stimulus they provide; the desirability of educational alternatives; and the possibility of innovating under the charter law in ways that cannot be done under regular statutes, regulations, and union contracts.
- Some school districts profit financially from their charter schools.
- Though nearly all charter schools receive less money per pupil than conventional public schools-and some charter teachers are paid less than teachers in conventional schools-some schools have used their fiscal autonomy creatively to get extra mileage from available funds. This has produced some extraordinary improvements in efficiency and productivity.

### 3: Major Start-Up Problems

#### *Kids with Problems*

- More than half of all charter schools encounter unexpectedly difficult challenges from the students who attend them, primarily from the large numbers of disadvantaged and at-risk pupils who enroll. A high proportion of charter students can be termed "square peg" kids who do not fit the round holes of conventional public schools.
- Charter schools, in general, are welcoming such youngsters, adapting to their circumstances, and serving them well.

#### *Fiscal Woes*

- For a host of reasons, nearly all charter schools receive less funding than conventional public schools. Yet they are expected to demonstrate better results. Fiscal issues are often the greatest concern facing charter schools, particularly at the outset.
- The lack of capital funds and start-up funds is a particularly severe problem, as are uneven cash flow, burdensome paperwork, and school finance formulas insensitive to the peculiar circumstances of charter schools.

#### *Regulatory and Political Hurdles*

- Most charter laws still make it needlessly difficult to launch viable charter schools.
- Many restrictions arise in response to political pressure from charter opponents. Others come from unanticipated laws and regulations as well as inadvertent failure to eliminate or waive statutory and regulatory provisions.

#### *Governance and Staffing*

- Governance problems, although not widespread, cause grave difficulties for charter schools where they arise. Bad board-staff relations appear to be the most common governance difficulty.
- Charter schools have peculiar leadership needs that generally require the talents and background of several kinds of people.
- Staff turnover in charter schools does not seem greater than in similar "start-up" organizations.
- Charter schools are amply supplied with qualified and often unusual candidates for teaching and other staff positions. Yet some charter schools encounter staffing problems, especially in achieving a proper "fit" between personnel needs and individual staff members.

- Slightly more than half of all charter teachers come directly from teaching positions in other public schools. Twelve percent come from outside the normal K-12 teaching universe.
- The vast majority of charter schools hire only, or primarily, certified teachers (even when this is not required by law).
- Approximately 70 percent of charter schools pay "comparable" salaries to most or all of their teachers.

#### **4: Dilemmas for Policymakers**

##### *State Charter Policies*

- Charter schools are more likely to come into existence, and to succeed, in states with "stronger" charter laws. Ten factors are identified that distinguish such laws. The most important of these are sponsorship options other than local school boards, openness to diverse charter applicants, automatic exemption from laws and regulations, and true fiscal and legal autonomy for charter schools.

##### *Special Education*

- Nineteen percent of the students in charter schools in our sample have disabilities or impediments of which the school is aware that affect their education. Thus it appears that, contrary to some forecasts, charter schools are serving proportionately more disabled youngsters than are conventional schools.
- Many disabled youngsters in charter schools are being educated in ways that do not conform to the formal procedures and classifications of U.S. special education, yet such children appear to be well-served, and they and their parents are pleased.

##### *Teacher Unions and Charter Schools*

- At the state level, without exception, the unions' primary objective vis-a-vis charter schools is to keep the program as small, weak, and limited as possible.
- Charter school-union relations take many forms. Where union master contract provisions apply to charter teachers, there are generally waivers or informal understandings that things can be done differently.
- In states where charter teachers are allowed to organize their own union local, we found no instance where this opportunity has been seized. We did, however, find some schools where this may happen in the future.

##### *Finance Policies*

- District leaders often view all public education funds as "their" money. This leads many to resist such funds going to charter schools, even when the latter educate some of "their" students. Hence most charter schools do not receive their share of public education funds.
- Charter sponsorship and oversight carry real costs, and charter schools are not a cost-free reform for the state as a whole.
- Serious support of charter schools will entail revising many aspects of U.S. public education finance.

##### *Accountability and Evaluation*

- State charter laws are stronger on theory than practice when it comes to accountability and evaluation. No state yet has in place a fully satisfactory plan, though several are making good progress.
- Charter accountability criteria generally include reasonable progress in meeting each school's goals for its students; proper use of public funds; and general probity.
- A well-functioning accountability system will have clearly delineated content and performance standards; exams that mirror those standards; timely, understandable, and comparable results, including

academic and nonacademic indicators of success; and real stakes for all.

- States face the dilemma that conventional tests and other standard instruments may not suit the programs or philosophies of charter schools.
- Individual schools accept the need for accountability and many are working on specific standards, measures, and mechanisms that feature real consequences for everyone involved.

### *School Failure and Its Prevention*

- Some charter schools will fail and close or be closed. This is a plus for educational accountability and a model for public education generally.
- Public authorities have an obligation to minimize harm to students. This calls for an adequate monitoring program to provide early warning of troubled schools and a multifaceted intervention strategy.
- Policymakers should not, however, put charter schools on "life-support" systems. Failure should be tolerated, even welcomed.

### *Federal Policy Issues*

- Most charter schools are not now getting their "share" of federal categorical aid.
- Many features of federal education programs are poorly suited to charter schools.
- Many charter schools, for diverse reasons, are not seeking to maximize their participation in federal programs or to request "waivers."
- In a number of cases, charter schools are carrying out the spirit of federal programs without following all the fine print.

## **5: Conclusions and Recommendations**

### *Conclusions*

- Charter schools may be the most vibrant force in American education today.
- No one can say with confidence how large this movement may grow, but the demand for charter schools currently exceeds the supply.
- It is too early to say anything definite about their educational effectiveness, but there is a growing body of positive evidence.
- Particularly attractive features of charter schools include their intimate scale; clear, focused mission; freedom from excessive regulation and control; and the fact that students, teachers, and parents have chosen to be there.
- Charter schools are often havens for people who need and want alternatives to schools that have served them poorly.
- Genuine educational innovation is occurring in charter schools.
- Charter schools establish a much-needed prototype of educational accountability.
- Charter schools serve the public more like the voluntary institutions of "civil society" than like conventional public schools.

### *Selected Policy Recommendations*

- Provide a nonlocal sponsorship option or a strong appeals process for charter seekers.
- Allow any individual, group, or organization to submit a charter school proposal.
- Make charter schools legal entities in their own right.
- Set no (or very high) limits on how many charter schools there can be.
- Allow private schools to "convert" to charter status.

- Keep charter restrictions and regulations to minimum health, safety, and nondiscrimination provisions. Automatically exempt charter schools from other state and local laws and regulations. Beware of "stealth" restrictions built into other statutes and regulations.
  - Spare charter schools from union "master" contracts and allow noncertified people to teach in them.
  - Allow charter schools to educate disabled (and other at-risk) youngsters as their parents and those within the school think best.
  - Provide capital and start-up funding for charter schools.
  - Give charter schools the same per pupil operating funds (from both state and local sources) that conventional public schools receive, and deliver these funds directly to the schools, rather than through local districts.
  - Conceive of charter school accountability as a triad consisting of standards, assessments, and consequences.
  - Balance the state's interest in holding schools uniformly accountable against each charter school's legitimate interest in being judged in a manner consistent with its unique mission.
  - Make available ongoing technical assistance to charter schools, and develop a range of approaches to faltering schools.
  - Use the charter model to develop ways of holding all public schools accountable for their results.
- 

Executive Summary of "Charter Schools in Action: What Have We Learned?" July 1996, by Chester E. Finn Jr., Bruno V. Manno and Louann A. Bierlein, Hudson Institute, Educational Excellence Network, Washington, DC. Access or order [the full report directly on the Hudson Institute Web Site](#). To get back to the CER Web Site, just hit the back button on your browser, and you will return to this page.

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# Policy-Makers View the Charter School Movement

April 1996 Report

by Joe Nathan and Jennifer Power

The Center for School Change, Humphrey Institute, University of Minnesota  
Minneapolis, MN

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## Executive Summary

This report seeks to help explain why the Charter Public School Movement has spread to almost half of the states in less than five years. With bi-partisan support, the charter concept builds on three principles:

- freedom and choice for families
- entrepreneurial opportunity for educators, and
- accountability for results for schools.

The charter movement aims to give educators the opportunity to create new public schools, or convert existing public schools, into schools which will be explicitly responsible for results, along with encouraging existing systems to improve. This report surveyed 50 legislators and policy-leaders in seven states: Arizona, California, Colorado, Delaware, Louisiana, Massachusetts and Minnesota.

Legislators were asked why they had proposed charter legislation. The major reasons cited are:

- to help youngsters who have not succeeded in existing schools,
- provide opportunity for educational entrepreneurs,
- expand the range of schools available,
- increase student achievement and
- pressure the existing system to improve.

Virtually all legislators interviewed said they viewed adoption of charter legislation as an alternative to, rather than a prelude to vouchers.

Policy-makers have five central recommendations for strengthening charter laws:

#1 Give charter schools the same per pupil allocations as other public schools. In most laws, charter public schools receive less than the state average. Policymakers generally think it unfair to hold charter schools to a higher level of accountability, but give them less money per pupil.

#2 Permit more than one organization to sponsor charter schools. Virtually all agree that local school boards should not be the only group permitted to sponsor charter schools.

#3 Eliminate the cap on the number of charter schools. Most of the states interviewed have a cap on the number of charter schools. In several, the cap has been reached. Each policy-maker contacted believes that the states should not limit the number of charters allowed.

#4 Give charter schools a great deal of independence. Policy leaders say in exchange for accountability, charters deserve control over key items like budget, personnel and instruction.

#5 Provide some start-up funds. Most policy leaders believe charter schools deserve the kind of start-up funds other public schools receive.

The full report is available for \$5.00 from the Center for School Change.

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Charter  
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LEVEL 2 - 68 OF 209 STORIES

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March 7, 1997 Friday 1ST EDITION

SECTION: DENVER & THE WEST; Pg. B-02

LENGTH: 388 words

HEADLINE: Charter **schools** assessed Jeffco ratings run the gamut

BYLINE: By Janet Bingham, Denver Post Education Writer

BODY:

Jefferson County's Community Involved Charter **School**, which recently received low ratings from an outside evaluator, should be given a year to **improve**, district officials recommended Thursday night.

Jefferson Academy, which received top ratings from the same evaluator, should be given a five-year contract renewal; Sci-Tech Academy, rated most **improved**, should get a three-year contract renewal, officials said.

**School** board members will decide on the future of the three charter **schools** on March 27. Proposal rejected Board members Thursday night fired some hard questions at Pauline McBeth, principal of the Community Involved Charter **School**. They quickly rejected her initial proposal to **improve the school** by telling students that if they don't make enough progress they will not have the automatic right to return to the **school** next year.

"I hope we aren't picking and choosing who we want in our schools," said board member Dave DiGiacomo. "If a kid is not making progress, we don't throw him out. If charter schools are about having a litmus test for students, I will re-think my support of charters."

"I am concerned that we not create elite academies where we pick and choose who we want and discard the rest."

Board member John DeStefano, who had earlier said how impressed he was with the school, also told McBeth that "the intent of charter schools is not to have private schools with public money."

All schools are expected to work with all students, board members said. Low graduation rate An evaluation last week of the Community Involved Charter criticized the school's low graduation rate and said the quality of some of the student work is poor.

The school has 328 students in kindergarten through high school. Students set their own goals, design their own learning plans, and keep portfolios of their work. The school is considered the most unconventional of the three Jefferson County charter schools that are up for renewal.

The three, which opened in 1994, are run by parents and teachers with tax



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The Denver Post, March 7, 1997 Friday

money under contract with the district. Under Colorado's 1993 Charter Schools Act, the contracts must come up for renewal regularly. The **schools** can be **closed** if students **fail** to make reasonable progress toward meeting content and pupil performance standards agreed upon in their charters.

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# The New York Times

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June 30, 1997

## Rosa Parks Presses Plan for *Charter School* in *Detroit*

By HALIMAH ABDULLAH

**M**ore than 40 years after *Rosa Parks* refused to give up her seat to a white passenger on a bus, the opening salvo in what became the Montgomery, Ala., bus boycott, she is trying to set up one of the first *charter schools* in *Detroit*.

If her proposal for a *school* named for her and her husband, the Raymond and *Rosa Parks* Academy for Self Development, is approved by the *Detroit* Board of Education this summer, Mrs. *Parks*' *school* will join some 700 *charter schools* nationwide. *Charter schools* are run by many groups, including civil rights advocates, and by teachers who have left traditional public *schools*, and sometimes by private concerns. Proponents view *charter schools*, which are able to operate autonomously, as alternatives to traditional public *schools* and private and parochial *schools*.

The *Detroit* Board of Education has approved only two of the *charter school* proposals that have come before it since the state adopted *charter school* laws in 1993. Mrs. *Parks*'s application is one of 12 such proposals. Mrs. *Parks*, who lives in *Detroit*, hopes to open the *school* in September.

Mrs. *Parks* already runs an after-*school* program, the Raymond and *Rosa Parks* Institute for Self Development, which teaches children "quiet strength" and self-paced study, said Elaine Eason-Steele, the program's co-director. The *school* would be modeled after the institute and would serve 250 students in kindergarten through the 12th grade.

"We noticed in the youth that we have worked with that there are some things that are missing," Ms. Eason-Steele said. "Sometimes the youth solve things in a hostile manner. We want to help them develop a sense of self-esteem and consider other options."

Mrs. *Parks* has created similar after-*school* programs elsewhere.

The number of *charter schools* is growing nationwide, said Joe Nathan, director of the Center for *School* Change at the University of Minnesota. Nathan estimated that more than 700 *charter schools* would be operating in the United States this fall.

"There is great suspicion that many private and parochial *schools* are elitist," Nathan said. "These activists have seen that *charter schools* help kids in more urban areas."

Legislatures in 27 states have provided for *charter schools*, which operate with

public money but are not bound by the same rules and standards as traditional public *schools*.

*Charter schools* originated in St. Paul, Minn. In 1991, Milo Cutter and Terry Kraabel, both former public *school* teachers, started the Power League, an after-*school* program for 40 students who had been expelled from *school*. A year later, the Minnesota Legislature passed groundbreaking legislation that allowed the Power League program to grow into the City Academy, the nation's first *charter school*.

City Academy now has 90 students and nine staff members. Many of the graduates have gone on to college, and the *school* has a waiting list of 40 students.

In Houston, the Raul Yzaguirre *School* for Success attempts to raise the self-esteem of its students by involving the community in the *school's* programs. The *school's* mission reflects the philosophy of its founder, who is the president and chief executive officer of the National Council of La Raza, an nonprofit Hispanic-American organization. Parents are required to volunteer at the *school* as a condition of their child's acceptance.

"The dropout rate for Hispanic and African-American kids in our area is very high," said Adriana Tamez, the principal of the Yzaguirre *school*. "In order to help this problem, we feel we have to catch these kids at the middle-*school* level."

Mrs. *Parks's school* would have a similar mission. "We hope this works out," said Anna Amato, the *Detroit* consultant who is helping Mrs. *Parks* and others prepare their *charter* proposals, "because we want parents to know there are options out there that are not bound by where they live and how much money they make."

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type of aid available that the student doesn't have to pay back? — Several writers.

A. The question is asked the dozens of times a by students reluctant to tie up future earnings to pay for college. Experts often respond by saying: "You borrow money to buy a car and buy a house. Isn't a college degree just as important in your life?"

And given the resale value of houses and cars, it's probably the best investment of the three.

Stockton, Calif. Teens smoke due to "peer pressure," agrees Emily Yee, 18, Bloomington, Ill. "It takes the stu off. Their friends do it, and they want to be cool."

Yee and other panelists do say eliminating the appealing icons of tobacco advertising might affect decisions "by the

1 y younger kids," who are "more y influenced."

Panelists on other es: ▶ Price increase. Cigarettes might go up 75 cents a pack. Panelists are split on the effects. "Seventy-five cents more a pack will stop certain ones from starting," says Mark Bai-

ley, 18, Hyde Park, Mass. "But the die-hard smokers will still find a way."

One close friend who smokes says "money is a problem for him," says Sandy Marks, 17, Lutz, Fla. "If they really raise the price, it will be less of a turn-on." (Some re-

search does show ev price increase driv teen smokers to quit. But Jennifer Tyus catur, Ill., says m have money. "They ing their allowance t rettes; they are not ping into their own

# Participants grade charter schools high

By Tamara Henry  
USA TODAY

Charter schools are popular with parents, students and teachers, all of whom point to class size, individual attention and the curriculum as the favored features, says a report out Tuesday.

The Hudson Institute, a conservative think tank based in Indianapolis, says a two-year study found "satisfaction levels that are wide and deep" with charter schools, institutions created or operated by groups of teachers and other qualified individuals free from state and district oversight. The study of nearly 9,000 parents, teachers and students in grades five and above found charter schools:

▶ Motivate students. 58.6% of students say they like charter schools because of good teachers, 51.3% say teachers "teach it until I learn it," and 38.5% say "they don't let me fall behind."

▶ Keep parents "engaged." 43% point to greater opportunities for parental involvement, 53% like the small size, 45.9% like the higher standards.

▶ Empower teachers. 76.8% of teachers favor the educational phi-



Finn: One of the report authors says satisfaction rating is 'unprecedented.'

losophy, 64.8% were seeking a new school, 62.9% enjoy like-minded colleagues, 54.6% think the administrators are good, and 54.2% like the class size.

"The unprecedented data on satisfaction levels among charter school students, parents and teachers are pretty arresting," says Chester Finn, one of the four authors.

President Clinton has pledged support for charter schools and used his State of the Union address to call for a sevenfold expansion "so that by the year 2000, there will be more than 3,000 of them." About 25 states and the District of Columbia have laws that allow groups to organize the quasi-independent public schools.

However, Joe Nathan, director of Center for School Change at the University of Minnesota, cautions against unbridled optimism.

"I think the situation is encouraging but there are some charter schools that are being closed," says Nathan, pointing to a Minnesota school that had its contract canceled after three years when it failed to boost student achievement. "So, every charter is not doing a good job."

Nathan adds, however, that "I would say that (closures) are a sign that the process is working. Part of the idea is that ... these schools will be held accountable for results. I'm delighted that that's happening in some places."

The report refutes claims by charter school opponents and other critics who predicted such schools would attract only the best and brightest, leaving other students behind in underachieving public

schools. The study says charter schools offer better environments for children who are low-income, "at-risk," minority, have learning disabilities and behavior problems. Nearly 50% of the students in charter schools are members of minority groups: 25% Hispanic, 16% black, 4% Asian, 4% Native-American and 1% "other."

Nearly half of parents who said their children performed "poorly" in their previous schools are now doing "excellent" or "above average" work.

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## Charter School Legislation: 12 Criteria

Excerpted from *Charter Schools: Legislation and Results after Four Years*, January 1996  
by **Mark Buechler**, Research Writer  
Indiana Education Policy Center, Indiana University, Bloomington, IN

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### Expansive and Restrictive Legislation

As followers of the charter school movement have come to realize over the past two years, not all charter school laws are created equal (see, for example, Bierlein & Mulholland, 1995; Millot, 1995; Wenning, 1995). Some state laws have spawned dozens of self-governing schools that are operated by a variety of organizations and individuals, free from most regulations, and legally and financially autonomous. In other states, years have come and gone since the initial passage of the legislation without a single charter school having been established, so limited are the incentives for charter schools and so burdensome is the process of becoming one.

The following 12 criteria can be used to determine whether a charter school law is expansive (i.e., facilitates the development of autonomous charter schools) or restrictive (i.e., provides little incentive for charter school development):

- **Number of schools:** States that permit many charter schools encourage more activity than states that permit few.
- **Variety of sponsors:** States that permit multiple sponsors (such as local school boards, state boards, and universities) encourage more activity than those that vest authorizing power in a single entity, particularly if that entity is the local school board.
- **Variety of operators:** States that permit a variety of groups or individuals (such as teachers, parents or other citizens, non-profit organizations, and businesses) to start new charter schools encourage more activity than states that limit eligible operators to particular groups or individuals, such as licensed teachers.
- **Variety of schools:** States that permit existing schools to convert and new schools to start from scratch encourage more activity than those that permit only conversions.
- **Appeals process:** States that allow potential operators to appeal denied charters to a different authorizing body encourage more activity than states with no appeals process.
- **Evidence of support:** States that permit charter schools to be formed without demonstration of a specified level of support from teachers, parents, and community members encourage more charter school activity than states that require such demonstrations of support.
- **Blanket waiver from laws and regulations:** States that provide blanket waivers from most or all state and district laws and regulations encourage more activity than states that provide no waivers or require charter schools to negotiate waivers on an issue-by-issue basis with sponsors.
- **Exemption from collective bargaining:** States that give charter schools complete control over personnel decisions (hiring, firing, salary structure, etc.) encourage more activity than states in which

charter school teachers remain subject to district collective bargaining agreements.

- **Legal autonomy:** States in which charter schools are legally autonomous entities able to sue and be sued, acquire property, etc. encourage more activity than states in which charter schools remain under district jurisdiction.
- **Funding process:** States where 100% of per-pupil funding (based on average state or district per-pupil costs) automatically follows enrolled students to charter schools encourage more activity than states where the amount of funding must be negotiated with the district and, inevitably, reduced.
- **Financial autonomy:** States that give charter schools control over their own budgets encourage more activity than states that do not.
- **Start-up funds:** States that provide start-up funds to charter schools encourage more activity than states that do not.

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Excerpted from "Charter Schools: Legislation and Results after Four Years," Policy Report, January 1996, by Mark Buechler, Research Writer, Indiana Education Policy Center at Indiana University, Bloomington, IN.

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# Charter School Laws: Do They Measure Up?

*A report from the AFT Charter Schools Research Project*



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## Executive Summary

Public education is in ferment. There is much dissatisfaction with the current system. Many people believe that the **school** system is a moribund and highly bureaucratic monopoly -- indifferent to criticism, captive to union interests, unwilling to change, and unaccountable to the public. Cries for reform, greater accountability, and more parental choice are everywhere.

One reform strategy that has received considerable attention, since Albert Shanker first mentioned it in a press club speech in 1988, is "**charter schools**." Today 25 states have authorized **charter schools**, and 226 **schools**, serving upwards to 28,000 students, are operating around the country.

Advocates of **charter school** reform assume that these **schools** will:

1. encourage innovation;
2. be more accountable and focus on results;
3. expand public **school** choices for all;
4. provide new and increased professional opportunities for teachers;
5. require little or no additional money to implement or sustain; and
6. act as a catalyst for improvement of the public system.

Foes of **charter schools**, not surprisingly, hold a different set of assumptions. They believe that **charter schools** will:

1. cream off the more affluent students and those with higher academic skills, leaving the public **schools** bereft of resources and with the responsibility of educating the high-risk, high-cost students;
2. be no more innovative than existing **schools**, which taken as a whole are not particularly innovative;
3. rely on cheap labor and exploit teachers and other personnel;
4. reduce resources available to public **schools**; and
5. be no more accountable, or even less accountable, than public **schools**.

All of these assumptions can be put to empirical test as the **charter school** movement develops over the next several years; however, it is too early to tell what the results will be. Given the newness of their

next several years; however, it is too early to tell what the results will be. Given the newness of their operations, at present there are no data to confirm or deny the assumptions, but there is legislation that determines the characteristics of **charter schools**, including the extent of their autonomy and accountability, that can shed some light on these assumptions.

This report examines the **charter** legislation in 25 states in reference to the AFT criteria. Those criteria evaluate the legislation in regard to the likelihood that it will produce quality **schools** and/or serve as examples of how the larger system of public **schools** should operate. "Good" **charter** legislation includes features that ensure quality **schooling** within a system that protects the public interest and the integrity of public education. "Bad" legislation encourages **charter schools** to become the basis of an alternative **school** system created for a few, but operating at the expense of many.

Our analysis indicates:

- Not all states require that **charter schools** develop programs that are consonant with state and/or local standards. Nor do they all require that the **schools** participate in the state accountability system. Without such participation it will be difficult to hold the **school** accountable for results that are not already achievable in the existing **schools**; and students who move from **charter schools** back into the public **school** system or to other **charter schools** may have significantly different curriculum, making adjustment very difficult.
- All states prohibit **charter schools** from charging tuition, but they are less clear regarding fees and donations, a practice that needs careful monitoring to ensure that such monies do not become a proxy for tuition and therefore make **charter schools** inaccessible to some students.
- There is great variety in the governance structures of **charter** states, which results in an opportunity for a stronger teacher voice in **charter schools** in some states, and "business as usual" in **charter schools** in other states.
- The manner in which collective bargaining rights are abrogated and participation in teacher retirement systems denied may in some instances diminish the interest of teachers to participate (especially if the governance structure also restricts their policy development and decision-making roles).
- Provisions in some state laws release **charter schools** from employing fully certificated teachers.
- The reporting systems required in legislation in virtually all states are insufficient to determine whether students in **charter schools** perform as well or better than their counterparts who remain in other public **schools**.
- Some **schools** are **chartered** by the state or another entity not directly connected to the local district. This is troublesome because the likelihood of those **schools** influencing **school** district policies and providing models for change at the district level is remote.

Given our review, the AFT recommends that as policymakers consider new **charter** legislation or amend existing law, the following features be included:

- **Charter schools must be based on high academic standards.**

States are redefining the academic standards for all students. **Charter school** laws must require that **charter school** students be held to the same standards as the children in other public **schools**. **Charter schools** should be free to design curriculum and programs that will ensure the success of their students in

schools should be free to design curriculum and programs that will ensure the success of their students in meeting those common standards.

- **Charter school students must take the same tests as other students in the state and district.**

Although state achievement tests are imperfect, comparisons of **charter school** performance must be made to other public **schools**. If **charter schools** do not have to conform to state and district testing requirements, valid comparisons will be impossible.

Measuring what works and what does not work is part and parcel of accountability. Other performance measures should also be employed, for both the **charter school** and **school district schools**. But it remains essential that students are measured by the same instruments.

- **Charter school employees should be covered by the collective bargaining agreement.**

An important component of teacher professionalism and representation is the collective bargaining process. Unions throughout the country are engaged in education reform efforts that have redefined the traditional contracts and have created opportunities for waivers from specific provisions of the contract that do not meet the needs of individual **schools** and programs.

**Charter school** laws that are designed to destroy the collective bargaining rights of teachers and other **school** employees do not serve an educational purpose; they serve a political purpose. Collective bargaining assures the rights of teachers. Unions should not agree to any wholesale diminution of the rights of public employees; provisions allowing for the waiver of contract provisions, however, should be included in the law.

- **Charter schools should be required to hire certified teachers.**

Teacher professionalization is not enhanced by **charter school** laws that encourage the hiring of uncertified people to teach. Although certification, in itself, does not guarantee that an individual will be a good teacher, it does ensure that a minimum level of competency has been demonstrated. States have found a variety of ways to provide alternative routes to certification that can be applied to **charter schools**.

At a minimum, **charter school** laws should require that teachers employed in **charter schools** either already have certification or be in the process of obtaining alternative certification. Knowledge and skill in subject area are critical ingredients in the make-up of a competent teacher, but knowledge and skill in transmitting information, evaluating student performance, and designing strategies for student learning are equally important.

- **Charter schools should have the approval of local school districts.**

If **charter schools** are to have a positive impact on other public **schools**, there must be a connection to the local district. Isolated **schools** that operate like private **schools** will not have the desired effect on the local **school** system. When **charter schools** try new approaches, utilize technology in unique ways, involve parents in the critical process of educating their children, or design new ways of using time and space, the innovations tested can spread to other **schools** with similar student bodies. An appeals process to the state should be available for **charter school** applicants to ensure a fair hearing to applicants and a strong connection of **charter schools** to the local education agency.

- **Charter schools should be required to make information available to the public.** Reporting requirements in **charter school** laws should be specific as to the type of information that **charter schools**

must provide to the public. While the intent of every **charter school** law is to have **schools** that are more accountable than the regular public **schools**, few require the types of information needed to determine the success and impact of **charter schools** on student achievement and systemic reform. To meet the AFT's criteria on reporting requirements, **charter school** laws must state specifically that **charter schools** report demographic information on students and staff, the number of special needs students served, the annual financial audit, the results of achievement tests, attendance rates for students and staff, mobility rates of students, teacher and staff turnover, parental outreach efforts, and graduation rates, where appropriate.

**Charter schools** can provide a real opportunity for reform. If these **schools** are indeed laboratories where new ideas are tested, new methods pioneered, and governance structures refined, they deserve to be supported. The AFT will continue to support **charter schools** that are "public and properly structured, that are designed to improve public education, and that support the notion that teachers are professionals who are capable of designing and implementing innovative educational programs."

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# **The Center for Education Reform**



## **Issue Update**

### **Charter School State Round Up**

(January 24, 1997) Charter school numbers continue to grow exponentially. In 1996, six states and the District of Columbia joined the ranks of those with charter school legislation. 1997 is sure to see others follow suit. New charter states have the advantage of learning from the successes and blunders of their predecessors, but also have the pressure of applying their acquired knowledge to the creation of the strongest charter laws our nation has seen. There is a direct correlation between the strength of the legislation and the number of schools a state can expect and with this in mind, 1997 will see states working on solid, new charter legislation and serious efforts to strengthen existing laws. We are grateful for the following insights from Dr. Ted Kolderie, and other state resource people.

#### **Where to look for active legislative efforts:**

- **Maryland** has the possibility of legislation in 1997 in the wake of a recommendation from the Mayor of Baltimore's appointed task force for charter schools in Baltimore City. In addition, the chairman of the state board is a proponent, and a task force is studying the issue.
- **Missouri** will see charter legislation introduced within a package of education bills. The bill is a split level provision that allows for Kansas City and St. Louis to operate under a stronger law than areas outside the city, where chartering authority will be left solely to the local board.
- **New York:** Governor George Pataki introduced a strong charter proposal in his budget bill for next year. Local support is strong.
- **Oregon** has a bill in the House that is strongly supported in committee, and also enjoying support from the Senate. The Education Committee Chair, however, may need a bit of prodding.
- **Ohio** continues its efforts from last legislative session where charter legislation passed the House but got no further.
- **Pennsylvania** also continues efforts being carried over from last legislative session.
- **Washington**, undaunted by November's setback, has a bill being introduced in the Senate.

#### **Efforts to upgrade existing laws:**

- **Arkansas** is currently home to a dead charter law, but may follow Texas and adopt the open enrollment charter provision Texas adopted in 1995. Individuals starting schools may then apply directly to the state board
- **California** will see efforts to improve its relatively strong law. The cap has been waived, but not permanently lifted and currently the State Board is the only chartering authority, yet school boards must recommend and often encumber approved schools.
- **Connecticut** may try to upgrade its law. A state improvement panel formed in response to the Sheff v O'Neil court case has recommended charter schools, and state officials are reportedly enthusiastic.
- **Georgia** probably won't see alternate sponsors in 1997, but may move beyond its "conversion only" status.
- **Massachusetts** has reached its cap of 25 schools, but will see efforts to raise or eliminate that

restriction.

- **Minnesota** has two similar bills that aim to substantially strengthen the current law. Key funding issues will be addressed, such as aid for building leases, making start-up funds available, and bringing charter school per pupil funding up to the amount schools in surrounding districts receive.
- **Rhode Island** needs changes because the current law, shaped very much by the influence of the teachers unions, does not provide enough incentives for charter schools to actually develop. Only 3 applications were received by the December 1, 1996 deadline.
- **Texas** has interest in raising the cap currently set at 20 schools.
- **Wisconsin** can expect concerted efforts from both Governor Thompson and charter advocate Howard Fuller to strengthen the law by adding alternate sponsors.

## Stumbling Blocks to be Addressed

There are still aspects of the charter concept that remain misunderstood and problematic. For the charter idea to remain true to form and create truly autonomous schools that positively impact the existing public school system, certain issues must be addressed.

- **Clarification of the Charter Concept:** It is important to remain focused on the fact that the charter concept is as much about giving districts incentives as it is about individual schools. However, each charter school should be viewed as a district in and of itself; it is simply a district with no tax base. Funding formulas should be developed with this in mind, a good example being the plan recently proposed by Minnesota's Governor Arne Carlson.
- **Application Review Process:** The review process needs to be examined and improved. There should be a "one at a time" rather than a "batch" approach. The latter tends to create a situation where schools are compared to each other rather than being evaluated on their individual merits.
- **Desegregation Issues:** Whether charter schools must comply with desegregation policies will vary based on individual state laws and the interpretation of those laws by the attorney general. If charter schools are districts in and of themselves, this should not be an issue, nor may it be if desegregation orders eventually disappear.
- **Special Education:** This is an issue charter organizers continue to grapple with. Charter schools founded by special education experts may come under scrutiny for using innovative practices, and states that do not compensate for learning disabled kids may purposely recommend that special education students be placed in charter schools. In anticipation of many hurdles, it is important to collaborate and pilot an efficient, effective way of educating special education students in charter schools.

Collaboration, networking, and sharing information between charter organizers is key to making the charter concept a reality. Offering parents, children, teachers and administrators not simply options but an array of quality options within the public school system is the ultimate aim of the charter idea. This will occur as legislators and charter organizers build on experience and create strong laws and sound implementation processes.

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The Center for Education Reform is a non-profit, national advocacy group working to improve the nation's schools. For more information about this or other education reform issues, please call (202) 822-9000 or (800) 521-2118, or send e-mail to [cerdc@aol.com](mailto:cerdc@aol.com).

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# The Center for Education Reform



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## National and State Charter School Organizations

Below is a listing, by state, of organizations involved with charter schools, from legislation to research to operation. We have also compiled a list of [State Department of Education charter school contacts](#). To find out more about charter school activities across the country, check out the statistics, research and resources available in our [Charter School](#) library.

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### National

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Stephan Tracy, **The Edison Project**, 529 Fifth Avenue, New York, New York 10017, (212) 309-1600

Alex Medler, **Education Commission of the States**, 707 17th Street, Suite 2700, Denver, CO 80202-3427, (303) 299-3635

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## Online

America Online Charter School Forum, keyword: charter. Maintained by Frank Dooling, Tacoma, WA, [afcfrank@aol.com](mailto:afcfrank@aol.com)

**Charter School Research Website at <http://csr.syr.edu>**. Maintained by Jude Lynell Hollins, Syracuse University, NY, [jlhollin@mailbox.syr.edu](mailto:jlhollin@mailbox.syr.edu)

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## Charter Schools: The Research

Excerpted from Policy Brief, March 1996

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### State Level Research

Notable Minnesota Research Projects

Notable California Research Projects

Notable Colorado Research Projects

### National Level Research

### The Future of Charter Schools

### References

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Charter schools have emerged as one of the most dynamic educational reform initiatives of the nineties. By January 1996, a total of 20 states had enacted charter school laws. Another 20 states considered charter school laws in 1995. Taken together, 40 states have demonstrated a clear interest in the charter idea -- a surprisingly strong trend considering that the first charter school law was passed in Minnesota only five years ago.

Although this is not intended to be a comprehensive review, several charter school research projects are described: some that have revealed lessons learned in the implementation of charter school laws, and others, more national in scope, that were designed to systematically describe existing charter schools and document their impacts.

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### **State Level Research**

Now that laws are active in a number of states, research results are becoming available. In three of the states with the oldest charter school laws (Minnesota, California, and Colorado), studies were developed to describe the range of challenges, barriers, and benefits encountered in the chartering process. A few of these studies and their key findings are described below.

#### **Notable Minnesota Research Projects**

Susan Urahn and Dan Stewart of the **Minnesota House of Representatives' Research Department** released a study in December 1994 that examined their state's charter school law. The research team surveyed school boards and parents, interviewed superintendents, visited schools, and conducted document analyses. They also examined the types of proposals offered and approved, the concerns and benefits raised by stakeholders, the outcomes specified in contracts, and the problems encountered.

Primary problem areas that the report identified for new charter schools were transportation, location and

Primary problem areas that the report identified for new charter schools were transportation, location and financing of facilities, special education, and relationships with the sponsoring district. The report raised a number of policy implications, many of which have been dealt with legislatively since the report was written. However, most are valid for other states with expansive laws:

- Freedom from regulation, though beneficial, can create unintended side effects. For example, questions arose over the applicability of laws regulating such things as meetings and elections.
- Accountability is not easy. While charter schools must meet student outcomes defined in their charter based on agreed-upon assessment methods, review of the contracts showed that some outcomes and assessments could be improved. Also, researchers noted that the resources needed to adequately evaluate outcomes may deter districts from sponsoring charter schools.
- Business experience is important. Lack of business acumen by charter school organizers led to some difficulties because planning placed little emphasis on day-to-day administration. Therefore, charter schools should be viewed, and treated, not only as educational enterprises but also as businesses.
- Lack of start-up funding may hinder charter schools. This lack has previously been filled by grant funding, but as more charters are approved this source is diminished.
- Absence of facilities funding may become a bigger problem. Charter schools are often housed in old school buildings rented at low cost from districts. At some point these old buildings will require major repairs. Alternative facilities are often too costly or not appropriate as schools.
- Certain transportation requirements may be counterproductive. In Minnesota, sponsoring districts must transport their resident students who are enrolled in charter schools, but the charter schools themselves could not receive transportation funding. Therefore, charter schools were forced to conform to district bus schedules, which effectively eliminated their control over the school day and calendar year.

In 1995, the Minnesota legislature authorized and allocated \$75,000 in funding for the State Board of Education to conduct a year-long evaluation of Minnesota charter schools. **The Center for Applied Research and Educational Improvement at the University of Minnesota** was contracted to conduct the study. Its focus will be on student achievement and the effects of charters on the educational system.

### **Notable California Research Projects**

A May 1994 report by Marcella Dianda and Ronald Corwin of **Southwest Regional Laboratory (SWRL)** was based on surveys of 33 charter schools and their sponsors after the first year implementation. Data provided information about schools, parents, students, and the experience of becoming chartered. Researchers also proposed reasons for the law's limited use during its first year and provided recommendations for change. Some of their key findings are presented below:

- The most common reason for seeking charter status was freedom from specific state/district regulations and union contracts. Other reasons included control over curriculum and instruction, and the ability to implement specific educational changes.
- Charter schools reported superintendents to be the most supportive members of sponsoring districts, while district office personnel were the least supportive. School board support in metropolitan areas was low, while in rural areas it was high. Overall, schools that sought more autonomy from the district received the least district support.

- Freedom from state codes and regulations was beneficial, but district regulations and union contracts (negotiable elements under the law) were still obstacles.
- Schools that pushed for and obtained legal autonomy were less likely than more dependent charter schools to report good relationships with their sponsors or the teachers union. (By law, California charter schools can gain legal autonomy with consent from their sponsoring district, but in reality most schools agreed to less than total autonomy.)
- Most schools were covered by local collective bargaining, with more than one-fourth waiving certain provisions, such as those regarding teacher evaluation. Newly created schools were not as likely to bargain with districts.
- In more than half the reporting schools, parents were required to sign contracts guaranteeing their participation. The equity issue inherent in this arrangement was the subject of a paper by Henry Becker, Kathryn Nakagawa, and Ron Corwin (Parent Involvement Contracts in California's Charter Schools: Strategy for Educational Improvement or Method of Exclusion?) published by SWRL in April 1995.
- Charter schools serving low academic achievers were more often located in metropolitan rather than rural areas. Overall, however, metropolitan schools served a broad cross-section of students: gifted, low achievers, low income, limited English proficient, and minority students were all drawn to charter schools.
- One-third of district respondents planned to disseminate the effective practices used in the charter schools, but whether the districts would encourage new charter schools will depend on whether they conclude the schools can improve education or dovetail with other reform efforts in the district. One-fourth of the charter schools surveyed felt that districts relaxed some policies due to their presence.

SWRL released another report in January 1996 titled, *Freedom and Innovation in California's Charter Schools*. This study expanded the original survey to 53 charter schools and added 46 comparison district schools that students might otherwise attend. Also, another 63 charter schools out-of-state were surveyed.

Amy Wells of UCLA, and graduate students Cynthia Grutzik, Dolores Bernal, and Diane Hirshberg, conducted a study of California charter schools focusing on equity and access. Their preliminary overview of charter school resources and access was presented at the 1995 American Educational Research Association conference. Community resources were assessed through census tract data on income, race/ethnicity, and education in three school districts with the most chartering activity. Access was examined in a review of charter proposal language describing admissions criteria, parent involvement requirements, racial balance efforts, transportation, and services for special-needs students. Acknowledging that census tracts do not represent the schools' service areas, the authors suggested that charters were initiated and implemented in primarily white communities with higher-than-county-average income and education levels. After reviewing 20 proposals, they also suggested that parent involvement requirements may limit access to certain families. More in-depth study is planned.

**The Institute for Policy Analysis and Research (IPAR)** in Berkeley has studied the California Charter Law and provided technical assistance to charter schools with funding from the state's business roundtable. In 1995, IPAR released a policy research report titled *Making Charters Work*, which drew from a phone survey of California charter schools, legislative analysis, and ongoing contact with a majority of the state's charter schools. Currently, IPAR's Eric Premack is working on descriptive summaries of all California

charter schools. These summaries will include enrollment figures and race/ethnic makeup of schools. Each charter school description will also provide an overview of the school and its distinguishing features, obstacles encountered, founders' concerns, and assessment data (where available). Comparisons will be made to district and state enrollment characteristics. This report is scheduled to be completed in March 1996.

### **Notable Colorado Research Project**

In March 1995, Joy Fitzgerald of the **Colorado Children's Campaign** released a report that covered implementation issues, provided descriptive information about the charters that were granted, reported anecdotal evidence of secondary effects, and suggested changes to the law. Some key findings follow:

- The appeals process was widely used, giving charter applicants recourse when a district denied an application. At the time of the report, 23 appeals had been heard, of which five were remanded to the district and three were subsequently approved. A proposal for the Thurgood Marshall Middle School, however, was denied twice by the Denver Public School District. After the second denial the State Board ordered the district to approve, but the case has not yet been resolved. A thorough discussion of the Thurgood Marshall School's ongoing efforts can be found in Education Week (Hill, D. October 4, 1995).
- In addition to the above-mentioned charter school denial, which led to a lawsuit, Fitzgerald's report described another lawsuit. This suit was filed in federal district court by parents in Pueblo who contended that two existing public schools had been closed in favor of opening a new charter school. The parents charged that charter schools were unconstitutional because they created large disparities spending, took away funds from public schools, and would most adversely affect Hispanic students who remained in the public schools. The federal district court dismissed the suit after finding the school closures and charter school approval to be independent actions.
- On the positive side, Fitzgerald's report identified areas where the charter school goal of innovation was being realized. Innovations were found not only in instruction but also in parent involvement, budgeting, accountability, governance, and (with the help of the waiver process) management.
- Charter schools applied for numerous waivers. (Instead of a "superwaiver" from most education codes, Colorado charter schools must apply for individual waivers.) The most common waiver requests involved:
  - (1) Teacher evaluations: Under state code, evaluations must be conducted by a licensed administrator. Charter schools sought waivers from this regulation because they did not always have licensed administrators on staff. Instead, they involved parents, staff, and governing board members in the evaluation process.
  - (2) Administrative license requirements: Waivers were sought when charter schools chose alternative management structures without a traditional principal.
  - (3) The Teacher Employment, Compensation, and Dismissal Act: When waived, charter school teachers signed annual contracts, in which salary and benefit packages were negotiated with the charter school's governing board.
  - (4) Teacher license requirements: Waivers were sought to allow charter schools to hire teachers with other types of work experience.

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## National Level Research

The **U.S. General Accounting Office (GAO)** organized the first nationwide effort to compile a variety of charter school experiences. The results were reported in January 1995 and focused on four areas: 1) number of charter schools approved and programming they offered, 2) autonomy of charter schools and influences on autonomy, 3) accountability systems in place for charter schools, and 4) administration of federal programs in charter schools.

GAO staff reviewed proposals and charters to learn about their instructional programs, administrative and financial relationships with districts, and accountability systems. Legislative analyses examined the differences between state laws. Interviews were conducted to learn about individual schools, relationships between schools and districts, and the experiences of schools, districts, and states in disbursing federal program funds.

- The GAO found great diversity in the methods used to assess students and the specificity of outcomes described in charters. The report questioned whether adequate baseline data were being collected to evaluate changes in student performance, and whether data would be reported in such a way that the progress of different demographic groups could be tracked. It also questioned requirements that charter schools use standardized norm-referenced tests, especially those schools that targeted low-achieving students.
- The GAO suggested that new means of administering federal programs were needed because many charter schools were not tied to a school district, the usual local anchor for federal program administration. Although some states treated charter schools as local education authorities, state administration for Title I still holds districts liable. As of the GAO report, many states had still not resolved this missing linkage in administering federal programs.

In July 1995, Alex Medler of the **Education Commission of the States (ECS)** and Joe Nathan of the **Center for School Change** surveyed 110 charter schools and described them in terms of: grade levels served, school size, and facility type; subject focus or target student population; intra- and interdistrict enrollment; start-up funding and sources; reasons for seeking charter status; business and community partnerships; contracts for services and teacher qualifications; assessment tools used; and technical assistance needed.

ECS is continuing to explore charter schools with a Danforth Foundation grant. Louann Bierlein of the Louisiana Educational Policy Research Center at Louisiana State University recently examined ethnic/racial composition and other demographic information on children in charter schools. Impacts that charter schools are having on the educational system are also documented. ECS published her findings in February 1996.

Chester Finn and Bruno Manno of the **Educational Excellence Network at Hudson Institute** together with Bierlein are conducting a two-year study of approximately 35 charter schools in Arizona, California, Colorado, Massachusetts, Michigan, and Minnesota. The goals of this project, funded by the Pew Charitable Trusts, are to identify policy and practical issues in implementation and to inform policy makers and practitioners of solutions and strategies. Their first year report was released in January 1996.

Mark Buechler of the **Indiana Education Policy Center at Indiana University** released a January 1996 report, *Charter Schools: Legislation and Results after Four Years*. This report discusses trends in

legislation and contains a chapter devoted to charter schools in operation. It also describes schools in terms of size, student population, and educational approaches, and it presents data on parent involvement, student achievement, barriers encountered, and early evidence of the effects of charter schools on other schools. The report's prima focus is national, but one chapter is devoted to a history of charter school bills in Indiana.

Marc Dean Millot of **Rand Corporation** has conducted four different studies analyzing charter school laws. His most recent effort is titled, *Creating a Market for Public Schools: Lessons Learned from Early Implementation of the Massachusetts Charter School Statute*. It will be released sometime in Spring 1996.

The **federal Charter Schools Program** was created through Title X of the Improving America's Schools Act (IASA), which reauthorized the Elementary and Secondary Education Act. Title X funding is designated for implementation and initial development of charter schools. Although \$15 million was authorized for the program, Congress allocated only \$5.4 million in 1995. Ninety percent of these funds were designated for a state grant program to help charter schools defray start-up costs. The other ten percent were designated for a national evaluation and other national activities.

In the first year, the national activity money (\$536,000) was earmarked for the four-year charter school evaluation study awarded to **RPP, International**, a Berkeley, California based policy research center. RPP heads the study's research consortium which consists of the University of Minnesota's Center for Applied Research and Educational Improvement and the Institute for Responsive Education, a Boston based non-profit research group.

The RPP study will involve 50 charter schools, of which 30 will be selected in the first year, and 20 will be added the second. Researchers will conduct an annual telephone survey of all charter schools, achievement testing at a matched sample of charter schools and regular public schools, case studies, and an intensive study of a few charter schools in order to explore policy issues affecting them. The first-year report will be available in November 1996.

In addition to the efforts described above, professors and graduate students across the country are also beginning to study many aspects of charter schools. Projects should begin to surface in greater numbers now that many more laws are operational. An increasing number of policy papers and discussions of charter schools are also appearing in academic journals (e.g., Raywid, 1995; Wohlstetter & Anderson, 1994; Wohlstetter, Wenning, & Briggs, 1995).

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### **The Future of Charter Schools**

Political tides, no doubt, will bring much to bear on the future of the charter school movement. Of the 20 states that considered, but did not pass, charter school legislation in 1995, most will probably resurface with bills in 1996.

Clearly, the next five years will prove pivotal in determining the future of charter schools. Will enthusiasm fizzle in favor of other reforms, or will charter school momentum continue to build? Hopefully, new policy decisions affecting the status of charter schools will be informed by a growing body of research.

**Note:** The research projects featured represent many, but not all, of the major charter school-related research conducted or currently in progress. Please note also that only research highlights are presented, not complete findings. Readers are encouraged to obtain the full reports cited to gain a more thorough

understanding of the research literature.

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Excerpted from "Charter Schools: The Reform and The Research," Policy Brief, March 1996, by Lori Mulholland, Senior Research Specialist, Morrison Institute for Public Policy, Arizona State University, Tempe, AZ.

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# A Guide to Charter Activity, August 1996

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## A GUIDE TO CHARTER ACTIVITY (AUGUST 1996)

That new part of public education often called "the charter movement" continues both to grow and to evolve. We're seeing new ideas in the laws and innovations in the learning programs. There're new twists on governance and on management. Lots of energy; people working very hard. Lots of mistakes but lots of dynamics. All typical of any new movement.

This guide tries to provide the names and phone numbers of the key people involved, and some sense of the program and the politics in each state. This gets harder as new states come in, as programs grow and as people move. So, again, my apologies for any errors and omissions. I'd appreciate corrections; in the names and phone numbers or in my reading of the situation.

Mostly this is a guide to people involved with the live laws that can have real system effects . . . the strong programs in which the state opens the way for some public body other than the local board to offer public education in the community, as well as for some entity other than the district to start and run a public school.

### The National Scene

Since 1994 this idea -- of the state opening the way for more than one organization to offer public education in the community -- has moved increasingly to the center of the national search for an effective strategy. In mid-1996 the level of 'national' attention to the charter idea is quite remarkable.

**Meetings:** The U.S. Department of Education brought (mostly) people running charter schools into Minneapolis July 26- 27 for a how-to discussion; about common problems of start-up and operation. The fascinating networking-session organized by the Association of Educators in Private Practice (August 1-3 in Milwaukee) was important for Howard Fuller's successful effort to link charter and contract with the interest of inner-city constituencies. The Sept. 16-17 meeting in Boston of the Education Leaders Council, the non-establishment group pulled together by Jeanne Allen, will include 'charter'. A group of rather more establishment (mostly Colorado-based) organizations is putting together a meeting "on policy" in Denver

Sept. 19-21. Carla Dietsch 206/669-5073 is planning a national meeting in Seattle October 25-26; the first meeting of the National Alliance for Charter Schools -- perhaps a national association of state operators' associations -- which Jim Alverson 602/985-6112 is forming.

**Directories of Schools:** The best nationwide directory -- names, addresses, phone numbers and brief descriptions -- of charter schools appeared this spring from the Center for Education Reform in Washington. For a copy call 202/822-9000. CER plans to keep it current, probably in print form only.

**Electronic discussions:** Persons interested in the charter idea can connect through a forum put together by Frank Dooling, a former naval person in Tacoma WA 206/539-3669. AOL subscribers will find a message board and two libraries by hitting keyword /CHARTER/return. There's a weekly live conference every Sunday afternoon: details are in the "monthly update" file in the main menu of the forum. Dooling and others say "Charter Researching: Net Stations and Resources", which identifies and links to most others, is a wonderful resource: <http://csr.syr.edu>. The Center for Education Reform, which finds itself increasingly drawn into the charter idea, has material available at <http://edreform.com>. For California see <http://www.csus.edu/ier/charter.html>. Charter is in the Hudson Institute site: <http://www.edexcellence.net>.

**Good basic information:** A solid introduction to the charter idea, laws and schools on videotape has been put together by Dr. Joe Freedman (see below re: Canada). The 56-minute tape and an accompanying 112-page book are available (together) for US\$19.95 from: Society for Advancing Educational Research, 57 Allan Close, Red Deer, Alberta, Canada T4R 1A4 or by faxing an order to 403/343-7042. Phi Delta Kappa did one of its Fastback booklets on "Understanding Charter Schools": Call 812/339-1156. The Hudson Institute 800/483-7660 publishes a very helpful 'briefing packet' with a good bibliography. Good basic advice on how to start a school is available from Joe Nathan at the Center for School Change 612/625-3506 and from Pam Riley at the Pacific Institute 415/989-0833. Some of these contain recommendations. A model bill from this Public Services Redesign series is available in Frank Dooling's AOL forum (see above), at the CER site and perhaps elsewhere.

**"What's happening?":** It's too early really to know much about student achievement. But a picture is emerging at least of what the schools are and who their students are. The Little Hoover Commission report in California in early '96 was full of information and almost a proxy for the country: Ask Kathleen Beasley 916/445-2125. The first-year report from the Hudson Institute on seven states (under its grant from the Pew Trusts) is now available: 800/483-7660.

**Summaries of State laws:** A map attached to this memo includes the new '96 laws and shows the number of charters approved by state. Eric Premack 916/278-4600 is currently bringing the analysis of the laws up to date, for the RPP International report to the U.S. Department of Education. ECS, NCSL and the Center for Education Reform will probably be updating their summaries as well. Existing summaries are useful 'through '95'. A "National Survey and Analysis of Charter School Legislation" is available from the Institute for Responsive Education in Boston 617/373-2595. The Education Policy Center at the University of Indiana 812/855-1240 has "Legislation and Results after Four Years". Dean Millot in the Washington office of Rand Corporation 202/296-5000 has a legal analysis. Mike Mintrom 517/355-7682 at Michigan State has a report on "Charter Laws Across the United States".

**Advocates, designers:** The group that began by proposing strong laws has remained active and has grown as others have joined. Joe Nathan at the Center for School Change in the Humphrey Institute 612/626-1834 is very helpful: His new book Charter Schools (published September '96 by Jossey-Bass) contains an outline for a 'strong' law. Eric Premack, who has been helping schools, their sponsoring districts and the state work things out in California, is especially realistic about operational problems and how to avoid them. Louann Bierlein 504/342-1608, is busy now as education aide to the new governor of Louisiana but remains a good source on "the first 20" laws. She's at 504/388-5006. Howard Fuller 414/288-7351 now in

remains a good source on the matter. Another source at 202/822-9000, Jeanne Allen, now in the school of education at Marquette University, is an articulate advocate for 'charter' as a way to improve schools for black and poor children.

The state legislators who got through the strong laws are among the most useful resources. In Minnesota Sen. Ember Reichgott Junge 612/296-2889. In California (former) Sen. Gary Hart 916/278-4600. In Colorado Rep. Peggy Kerns 303/866-5523. In Florida Rep. Joe Tedder 941/683-0064 and in New Jersey Sen. Jack Ewing 908/766-7757 and Assemblyman Joe Doria 201/437-5150.

Some organizations earlier advancing other ideas about education reform quickly developed an interest in charter laws. At the Center for Education Reform in Washington talk to Jeanne Allen 202/822-9000. They go into states to do work and are well-informed about developments. The Rand Corporation is active mainly through Dean Millot 202/296-5000 and through Paul Hill 206/543-0190 who moved to Seattle in 1994 to set up a joint center with the University of Washington. Hill's interest in the autonomy and accountability of contract arrangements intersects with the charter idea.

As the laws come into place a whole new industry is developing, to help people start and run schools; offering advice, designs and services, for free or for a fee. This will have to be the subject of another memo, another time.

**Mainline organizations now involved:** As the growing support makes it increasingly credible the major policy groups are giving the charter idea more and more attention; though this may be controversial with their constituencies. The National Conference of State Legislatures began early to collect the laws passing and to schedule discussion at its meetings: Ask Connie Koprowicz 303/830-2200x136. The Education Commission of the States has come into the discussion in a major way: Talk to Alex Medler 303/299-3635 or go to its site <http://www.ecs.org>. At the National Governors Association talk to Patty Sullivan 202/624-7723. Nationally the teachers unions are now for charter schools (while their state affiliates work hard to block the 'live' laws that create them). At the National Education Association Andrea DiLorenzo 202/822-7334 handles the issue and with Bob McClure works on the NEA's program to help teachers start schools with charters from local boards (where the state affiliate approves). At the American Federation of Teachers ask ask Joan Buckley 202/879-4400 for the report released at the Cincinnati convention August 2. It recommends the Rhode Island law, which charter advocates consider the nation's weakest.

The U.S. Department of Education is now helping finance the start-up of new charter schools. From a \$6 million appropriation in '95 the program will grow to \$18 million in '96. The program provides block grants to states, which will subgrant to schools. Only if a state declines to apply would grants be retailed from Washington. In a breakthrough for federalism the law accepts the state's decision about what public bodies may grant a charter and what organizations may, if approved, run a school. Jonathan Schnur 202/401-3598 ([jonathan\\_schnur@ed.gov](mailto:jonathan_schnur@ed.gov)) in Secretary Riley's office is the lead person on 'charter'. John Fiegel 202/260-2671 handles grants. Pat Lines 202/501-7564 has the national study.

### The Scene in the States

It really is pointless to talk about "states with charter laws". With eight states having chartered 95% of the schools and another eight states having chartered 5% of the schools it does remain essential to distinguish between strong laws and weak laws, live laws and dead laws. This memo is laid out that way.

In states with live laws this memo tries to identify key persons from (1) the state department, which administers the law and provides information to applicants and to sponsors about the chartering process; (2) the "friends' group" outside state government that helps applicants get charters and helps schools get going; and (3) the associations of school operators.

## In the states with live laws, then:

**Arizona:** This is the wild west: the largest program after California (and the largest population considered); probably lots of good things but also big potential for trouble. A '96 change moving the term of the contract out to 15 years pretty well removes the accountability to public authority. Opponents who would normally challenge this (as in Michigan) may have decided they'd rather see the program blow up than have it fixed. The state superintendent is Lisa Graham Keegan 602/542-5460. In the department talk to Jeff Cohen 602/542-5206, or to Kathi Haas 602/542-5344 re: finance. Sen. Tom Patterson was a key author of the '94 law 602/542-5955; Chris Smith is helpful, on the Senate staff 602/542-5418. John Kakritz now heads the association of charter schools 602/261-7911: At the Goldwater Institute, still the "friends group", talk to Mary Gifford 602/256-7018.

**California:** A strong, dynamic program; the largest 'conversions' state. All 100 charters originally authorized have been issued so (with the CTA still strongly resisting proposals in the Legislature to move up to, say, 300) the state board has begun to raise the 'cap' administratively. Louis Caldera, an Assembly member from Los Angeles 213/680-4646, has emerged as a key author; as, also in the Assembly, have Kerry Mazzoni 916/445-7783 and Steve Baldwin 906/445-3266. Gary Hart, the Senate author in '92, now heads an education policy institute for the California State University system 916/278-4600 where Eric Premack (e-mail: [eric\\_premack@calstate.edu](mailto:eric_premack@calstate.edu)) now also spends part-time. In the department of education Dave Patterson is now happily back on 'charter'. Other helpful sources include Pam Riley at the Pacific Institute 415/989-0833 and Sue Bragato 415/598-8192 at CANEC, the association of charter schools. Its newsletter circulates beyond California.

**Colorado:** The original appeals process, unique to Colorado (in which the state board, if it approves, does not then become the school's sponsor but orders the local board to do it) had created a lot of conflict. Rep. Peggy Kerns 303/866-5523 was able this session to get changes which should improve the process (assuming the supreme court does not side with Denver, which has challenged the legislature's authority to set up such a process). Gov. Romer has been important from the start: His education aide is now Deborah Lynch 303/866-2656. In the department talk to Bill Windler 303/866-6631. Jim Griffin is the 'association' person, with the Colorado League of Charter Schools 303/985-7092. Colorado's is not a law to 'model' from.

**Connecticut:** New in '96. A split program, like Texas'. Half a strong law, maybe. Twelve charters may be issued by local boards and 12 by the state board. The state-chartered schools are limited in size (to 250 students) and get less money; a pattern typical of New England. The law results largely from the persistence of Sen. Kevin Sullivan 203/240-8600 and, in the Republican Senate, from Sen. Judi Freedman. Yvette Thiesfield 203/566-1233 will manage the program for the state department. The Center for School Change, spun off from the Graustein Foundation, is operating as a friends' group: Ask Gordon Bruno 860/586-2340.

**Delaware:** The Math and Science High School in Wilmington (for which the '95 law was apparently created) will open in fall '96 with about 300 students; a separate entity within the district high school. Several others should open fall '96. Call Ronald Russo 302/651-2727. Sen. David Sokola 302/739-4139 was the author of this short, clean law. Or talk to Paul Fine, the president of the state board 302/984-1700. Doug Archibald at the University might help: 302/831-6208.

**District of Columbia:** New in '96. Resuming its role as legislature for the District, Congress passed a school-reform bill which included a strong charter program (dropping the voucher program the House wanted). Ted Rebarber, aide to Rep. Gunderson, was key in the final solution. Applicants may approach either the D.C. board of education or a new "chartering board": seven persons appointed by the mayor of

Washington from a list of 15 submitted by Secretary Riley. Much of the law is based on language drafted by Jim Ford on the city council staff 202/724-8119. The Federal City Council has worked hard for improvements: Ask Dave Perry 202/223-4560. Ken Campbell with COPE 202/223-4560 is helping applicants start schools.

**Florida:** New in '96. Rep. Joe Tedder 904/488-2270 got his bill through on his second try. There will be no 'alternate sponsor' -- in Florida, uniquely, public schools are assigned to the counties by the constitution -- but other factors may produce a significant program, at least in some counties. Quickly, a Charter School Resource Center has appeared and is raising money for start-up grants: Call Jon Hage 954/927-2870. Dade County has moved quickly to receive applications. The state superintendent, Frank Brogan 904/487-1785, is supportive. Tonya Lemon 904/244-1022 is the aide for Gov. Chiles. Tom Watkins, who got the first school started in Detroit when he worked for Wayne State University has moved to Florida: 954/345-3008. Caroline Herrington 904/644-2573 is a good source at Florida State.

**Massachusetts:** The first 15 schools finished their first year; others from the 25 authorized in '93 will open in fall '96 and '97. More have been approved (the state board is now the chartering authority) but the Legislature has yet to raise the cap. Scott Hamilton 617/727-1313 is now in charge of charters, as associate commissioner of education. Outside, the "friends' group" is the resource center at the Pioneer Institute: Its how-to-do-it book and 'profiles' report on schools are models. The handbook is available online. Talk to Linda Brown 617/723-2277. Karen Byars 508/635-1800 directs the new operators' association. Tom Loveless follows the charter program for the Kennedy School at Harvard 617/495-9846. This is the only law to offer the local board no role, so districts have been especially hostile. Their attitude has led the state to pay them for students in fact no longer attending; which takes out a key dynamic. Boston did create its own "in-district charter" program in response: Ask Bob Pearlman at the Boston Teachers Union 617/288-2000.

**Michigan:** A high-profile, dynamic -- and contentious -- program; the least bipartisan among the states. Gov. Engler has provided tremendous drive: In his office talk to Mary Kay Shields 517/335-7824. Clark Durant 313/396-4200 chairs the state board. In the state department talk to Garry Cass 517/373-4631. Many of the charters have come from Central Michigan University: Talk to Robert Mills in its Charter Schools Office 517/774-2100. CMU also has, separately, a 'resource center': Ask Leonie Rose 517/774-2590. The Michigan Partnership for New Education, once the principal "friends' group", will now run two schools. Barbara Barrett and Bob Wittmann are still there: 517/432-3165. Anna Amato 810/632-7293 and Larry Patrick 313/961-8380, formerly on the Detroit board, are active in getting schools chartered. An "operators' group" has appeared, run by Jim Goenner 517/774- 3315. There's an invitation out nationally for an 'Expo' to show off Michigan's charter schools; May 29, 1997 in Lansing. Ask Mamie Thorns 517/774-2590.

**Minnesota:** A slowly but steadily developing program; gradually improving from the restricted law that was the nation's first when passed in 1991. The original authors, Sen. Ember Reichgott Junge 612/296-2889 and Rep. Becky Kelso 612/296-1072, have been joined by Rep. Mindy Greiling 612/296-5387 and, on the Republican side, by Rep. LeRoy Koppendrayner 612/389-1490. Susan Heegaard 612/297-1622 is important in policy development for Gov. Carlson. In the Department (now of Children, Families and Learning) Jessie Montano 612/296-2181 is in charge of "learner options", with Bill Allen 612/296-4213 on charters and John Bulger 612/296-9613 on charter finance. Joe Nathan at the Center for School Change 612/625-3506 is an active "friend". A Minnesota Association of Charter Schools is just now forming: Ask John Schultz 507/665-4033 at the New Country School, where the teachers design and operate the learning program under contract with the charter school. Dan Mott 612/291-9310 set up their cooperative; essentially a professional partnership.

**New Jersey:** New in '96. A bipartisan coalition led by Sen. Jack Fwino 908/766-7757 and Assemblyman

**New Jersey:** New in '96. Republican coalition led by Sen. Jack Zimling 609/700-7707 and Assemblyman (former Speaker) Joseph V. Doria, Jr. 201/437-5150 -- and joined in '95 by Gov. Whitman -- got through a bill on the final day of the session. The governor's education aide, David Hespe 609/777-2450 was very helpful. The NJEA was able to restrict conversions so the potential is mainly in new-starts. The commissioner, Leo Klagholz 609/292-4450, will be the chartering officer. Frank Esposito 908/527-2004 represented Klagholz in all the policy and the political discussions about the law. In the department call Dahlia Georgitas 609/292-5850. Legislators mean to form a clearinghouse: Ask Jason Teele 609/292-7065. Outside, local foundations are helping form a "friends' group": Ask Sarah Tantillo 908/932-7490x230. The charter idea may hold some potential for the districts taken over by the state: Jersey City, Paterson and now Newark; an alternative both to state- operation and to conventional contract management.

**North Carolina:** New in '96. Sen. Wib Gulley 919/733-5651 set out to get "the first strong law in the South" and may have succeeded. He and Republican Rep. Steve Wood 919/733-5807 came to a compromise just before the session ended. Applicants will be able to go to the local board, the state board or to the boards of the 16 units of the University of North Carolina for sponsorship. Ann Berlam in the department 919/715-1266 is expecting "a lot of applications". Thelma Glynn 919/682-8341 works on the group working on guidelines. Vernon Robinson 910/768-3567, a candidate for state superintendent, is positive.

**Texas:** All 20 of the "open-enrollment charters" permitted by the '95 legislation were taken by the second meeting of the state board. Much less interest is reported in the so-called "campus charters" for which applicants go to the local board. A legislative author was Sen. Bill Ratliff 512/463-0101. In the Texas Education Agency talk to Brooks Flemister 512/463-9575. David Dunn at the Legislative Budget Board was in the discussion early: 512/305-9579. Rey Garcia 512/463-0190 is in the office of (Lieutenant) Governor Bullock.

#### **In the weak-law states:**

**Alaska:** Talk to Sheila Peterson in the Department of Education 907/465-2803.

**Arkansas:** Jim Boardman in the department 501/682-4204 will handle any applications and will know the law and its history.

**Georgia:** In the department, John Rhodes 404/657-7637. Existing public schools apply, with district approval, to the state board. Grants for planning have encouraged applicants and 10 such charters have been granted. Interest in a strong law is growing outside and among legislators: Ask Rep. Kathy Ashe 404/656-0116 or Sen. Sallie Newbill 404/656-0036.

**Hawaii:** In the Legislature Sen. Mike McCartney 808/586-6910 still wants to improve the law enacted in '94. He's quite candid about its weaknesses. In the department Marge Gaza 808/586-3285.

**Illinois:** New in '96. After the '95 law turning over the Chicago schools to Mayor Daley the Legislature came back in '96 and without much further discussion passed Sen. O'Malley's bill; a local-board-only bill with some killer provisions. Parents disappointed with the local schools have little chance when the only sponsor is the local board. The law may operate as a strong law, however, in Chicago which now does not have a conventional board with conventional attitudes. In Chicago Olivia Watkins 312/535-7500 is assigned to 'charter' by schools CEO Paul Vallas, who seems most interested in conversions and in high schools. Leadership for Quality Education, now headed by John Ayers 312/853-1210 is emerging as the "friends' group" both for the "small-schools" initiative and for charter. Fred Hess at the Chicago Panel on Public School Policy 312/346-2202 and Jeanne Nowaczewski 312/641-5570 are both involved and

knowledgeable. At the state board Sally Vogl 217/782-0541 is good help.

**Kansas:** Ask Rodney Bieker, counsel for the department, about the law passed in '94 by Sen. Dave Kerr 913/296-7368.

**Louisiana:** The '95 law offered eight parishes broad opportunity to convert existing schools, but the boards have so far shown virtually no interest. A few schools proposed by community people are approved for '97 start. The new governor, Mike Foster, tried to add an appeal to the state board but lost on the Senate floor. Foster has named Sen. Cecil Picard 504/342-3607, the law's author, state superintendent and has brought in Louann Bierlein 504/342-1608 as his education aide, however, and will try again in '97. In the department talk to Bob Miller 504/342-3603. The Louisiana business community has supported a strong law: Ask Jackie Ducoate, now with the Public Affairs Research Council 504/926-8414.

**New Hampshire:** The law authored by Sen. Jim Rubens 603/642-6059 requires a town-meeting vote to activate the program; and this is proving difficult in a state with small districts, the lowest level of state support in America and a long tradition of hostility to state authority. One proposal passed and four were defeated (two by one vote). Despite this, Susan Hollins 603/643-6476 at the Charter Schools Resource Center reports 30-40 groups 'in planning'.

**New Mexico:** Only existing public schools may apply. Four now have charter status and 28 were competing for the fifth spot authorized. Rep. Bob Perls 505/764-9077 hopes to start all over again with a new bill in '97. In the department talk to Michael Kaplan 505/827-6576.

**Rhode Island:** Little was expected from this law, and no expectations have been disappointed. Ken Fish in the department 401/277-4600 should know if anybody does decide to apply.

**South Carolina:** New in '96. The law has an extremely complex process for approval and appeal and it's hard to tell how autonomous the school would really be (and who, on appeal, the sponsor would really be). An amendment from the black caucus requiring enrollment to be within 10% of the racial composition of the district, intended to block a school at Hilton Head, will also block any effort to form schools for black kids. The authors are Sen. Nikki Setzler 803/212-6250 and Rep. David Wilkins 864/232-5629. A helpful source is Sandy Smith on the House committee staff 803/734-3053. The state superintendent has not been positive. Outside, Steve Suits at the Palmetto Family Council has been interested 803/731-4313.

**Wisconsin:** A strange law which imposes no duty even on the local board to consider proposals from citizens (including teachers). Charters are granted, in effect, by the board to its own administration. It is essentially district contracting, often for alternative schools. Six schools operated in '95-96. Talk to Senn Brown 608/257-2622 at the school boards association. Progress toward a 'strong' law is slow, though Gov. Thompson and others continue to press for improvement. Some stronger features are appearing for Milwaukee; as, to let an applicant appeal to the state. This reflects largely the effort by Howard Fuller, the former Milwaukee superintendent and long an advocate for change in the city. In Thompson's office Jennifer Fox 608/266-1212 is handling these issues for Bob Wood 608/267-3839 until after the election. Tom Stefonek 608/266-5728 handles the charter law in the state department. Fuller's institute may emerge as the friends' group in Wisconsin.

**Wyoming:** David Nelson 307/777-7881 in the Legislative Service Office says nothing is happening.

**In Canada:**

**Alberta:** The province will have seven schools open by fall, under its 1994 charter legislation. The Aurora

School in Edmonton will be the first for mainline students; most have been for niche populations. The person in charge for the province is Ron Babiuk 403/427-2952. A good source both about Alberta and about the charter movement elsewhere in Canada is a medical doctor in Red Deer, Joseph Freedman 403/343-6172.

Teachers for Excellence in Education held a conference in '95 in Vancouver to highlight the charter idea: Talk to Helen Ranham 604/763-0852. Maureen Somers at the Coalition for Education Reform 905/939-2035 plans a similar meeting for this fall in Toronto. Both say the political opposition is intense.

#### **In states where bills are still under consideration:**

**Idaho:** For the third year in a row the bill sponsored by Rep. Fred Tillman 208/322-1133 cleared the House; to be killed again by the chair of the education committee in the Senate. Tillman plans to try again in '97.

**Indiana:** The mayor of Indianapolis and CLASS (a business- organization) merged their ideas into a bill that would have let districts, universities and the state grant charters. Nothing passed. Talk to Rep. Phil Warner 317/232-9760, chair of the House education committee, or to Sen. Teresa Lubbers 317/232- 9400. Carol D'Amico at the Hudson Institute in Indianapolis 317/549-4160 may know.

**Maine:** Discussion is only beginning: an early bill from Rep. Allen Barth had no luck in '96. Greg Scott in the department 207/287-8134 knows the situation.

**Maryland:** The president of the state board, Christopher Cross 202/347-4171, brought up the charter idea at the April meeting. Maryland's problem is Baltimore. With EAI gone the 30 problem schools will apparently now be put out to contract individually. The question is: by whom? Perhaps by 'Baltimore City' but perhaps by the state, in a non-managerial version of state takeover that would create a kind of 'learning zone'.

**Montana:** Sen. Daryl Toews 406/392-5377 introduced a bill in '95 for the school boards association. The unions amended it in the Senate to require union sign-off on a school, so the House killed it. Ask Bob Anderson at the association: 406/442-2180.

**Nevada:** The Legislature did not meet in '96. Talk to Sen. Raymond Rawson 702/687-8164, chair of Human Resources; or Sen. Maurice Washington 702/687-3652.

**New York:** In '96 the charter idea began to stir in New York City. The state Democratic Leadership Council sponsored a forum. The City Council had a hearing: Talk to the chair of the finance committee, Herbert Berman 212/788-6984. Columbia University has a group designing a bill: Ask Peter Comeau 212/678-3366. Joe Viteritti at New York University 212/998-7507 is active. The Manhattan Institute may be, as well: Talk to Seymour Fliegel, Coleman Genn or Carlos Medina 212/599-7000. The New York City Partnership will pick up the idea this fall: Talk to Gaynor McCown 212/493-7414. An early, weak bill was introduced in the Assembly by John Faso 518/455-5314. The interest comes on top of the charter-like program for new, small schools that goes back to the 1970s. Something like 60 new, small high schools have been set up in New York City in the last few years. The problem, as Ray Domanico at the Public Education Association 212/868-1640 points out, is that these have no institutional basis: They are formally inside the system and exist at its sufferance.

**Ohio:** A major, high-profile debate is still under way, with a final decision likely late in the fall. A bill authored by Rep. Sally Perz 614/466-6017 cleared the House fairly easily. She struck a deal with the OEA

along New Jersey lines but in the Senate action was blocked, mainly by the superintendents. Cooper Snyder 513/393-5177 having retired, the Senate chair will now be Sen. Dick Schafrath 614/466-8086. Gov. Voinovich's aide is Tom Needles 614/466-3555. Randy Anderson 614/466-0339 in the Legislative Service Bureau is exceptionally well-informed as is, on the Senate side, Liz Connolly 614/466-5221. The most recent thinking is targeting on the big cities, where fewer than 35% of the ninth graders pass the state proficiency tests. Cleveland, where 15% pass the proficiency tests, will be an important case. Frustration with the unwillingness of the interim superintendent to use the powers provided by the court may raise the community's interest in dynamics that can be provided only by state law.

**Oklahoma:** A bill based on the minority report from a task force chaired by Ron Bogle, president of the Oklahoma City board of education 918/749-0902, passed the House in '96 but got no further. The author is Rep. John Bryant 405/521-2711.

**Oregon:** A bill authored by Rep. Patty Milne 503/378-8854 fell short, in '96. Both strong bills and weak bills are being drafted, for '97. A ballot initiative, which also fell short, will be refiled for '98 vote. The state superintendent continues to represent the state's waiver law as a "charter" law, which may be what led Portland's superintendent to apply to be "a charter district". Dick Meinhard in Portland 503/234-4600 is always close to what's happening. The continuing interest in vouchers creates interest among some Democrats (now the minority) in a charter alternative: Ask Phil Kiesling, the secretary of state 503/986-1500, or Bill June 503/228-6816.

**Pennsylvania:** Gov. Ridge failed twice to get through a package which included both voucher and charter. When he declined to take the bill apart the Legislature decided to do so itself. A local-board-only bill authored by Rep. Ron Cowell 717/783-1905, now a minority Democrat, is waiting action in the Senate, where the chair is Sen. Jim Rhodes 717/787-2637. Charles Zogby 717/772-5300 is Ridge's policy director. There is growing interest in the two big cities. In Pittsburgh a Charter Schools Project has been set up with help from the Heinz Endowments and the Grable Foundation: Ask Jeremy Resnick 412/362-4515. In Philadelphia interest rises as the conventional improvement effort bogs down. John Claypool at Greater Philadelphia First 215/575-2200 is close to things. A 'cluster director' in the district, Karen DelGuercio 215/299-7823, has been talking with Supt. David Hornbeck about taking all her schools into charter status. Statewide, there is growing interest on the part of the Pennsylvania School Reform Network: Jan Hoffman 717/238-7171, its director, is very well-informed.

**Vermont:** Sen. Jeb Spaulding, chairman of the education committee 802/828-2231 picked up support from the state board this year and will try again in '97 to get approval in the House.

**Virginia:** A (fairly weak) bill failed on a tie vote in the Assembly this year; opposed by the school boards, superintendents and by the majority leader. Delegate Phillip Hamilton 804/249- 2580 says he is finding interest outside the Legislature, and plans to introduce a bill next year. Michelle Easton, vice president of the state board, will be working on a bill again in '96. A teacher in Newport News, Joan Wilt 804/874-8926 has been trying to help the cause along.

**Washington:** The Legislature thought seriously about a charter bill in '96 after Jim and Fawn Spady succeeded in getting on the fall ballot a far-reaching initiative measure which they call 'charter'. The Senate decided, however, to kill the bill and to hope the Spady initiative would fail. Rep. Dave Quall 360/786-7800 was the House author. Mary Fleckenstein 360/786- 7215 in House Democratic Research knows this issue. On the Senate side Leslie Goldstein 360/786-7424. Outside, Paul Hill at the University 206/685-2214 is a good source. Carla Dietsch 206/669-5073 means to be active on both the local and national scene. Bill Porter, formerly Gov. Romer's education aide in Colorado, is now in Seattle to head the Partnership for Learning 206/625-9655, a key business group.

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