

MEMORANDUM

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

*Charter Schools
AC -
I asked Julie
(who has done a
fair bit w/ Charter
schools) to draft
a note on the
obstacles to starting
them. Tom*

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.

Los Angeles Times

Mon
August
19

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AN EDITION OF THE LOS ANGELES

School Opening on Donated Site Caps 2 Dreams

■ **Charity:** Benefactors and educators joined forces for inner-city campus.

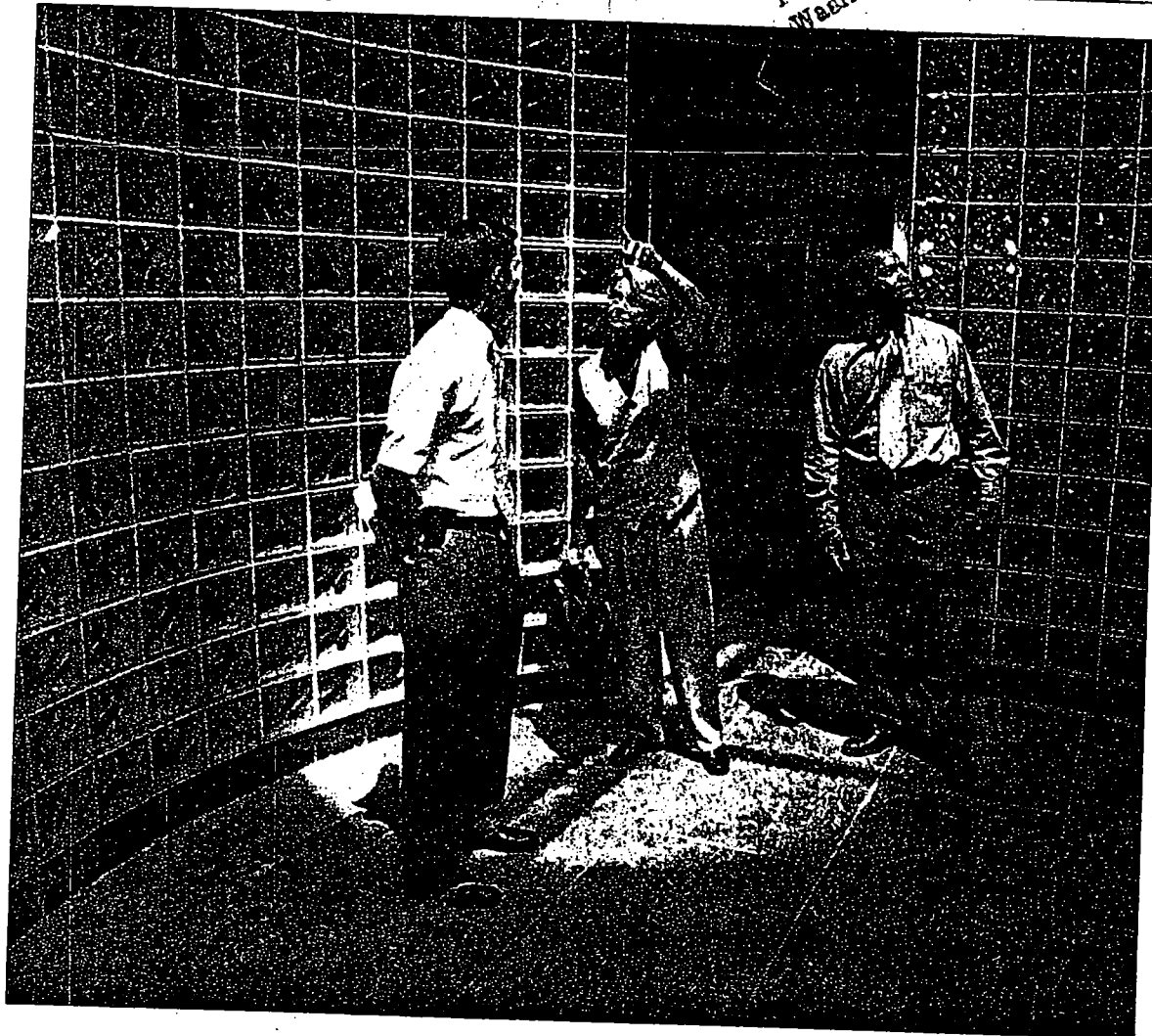
By AMY PYLE
TIMES EDUCATION WRITER

They were the unlikelyst of renegades: two mild-mannered Los Angeles public school teachers who shed the bonds of convention and union affiliation to start their own tiny school in a church social hall.

Three years of hard work later, Kevin Sved and Johnathan Williams are getting a reward of phenomenal proportions: Clothing designer Carole Little and her estranged husband and business partner, Leonard Rabinowitz, are giving their \$6.8-million former headquarters and warehouse south of downtown to the 80-student independent charter school.

The donation, believed to be the largest ever to a local public school, means that come fall The Accelerated School can move three blocks from its cramped quarters on East 37th Street.

Please see SCHOOL, B3



Kevin Sved, left, and Johnathan Williams look over posh new site for their school with Pamela Erwin of Wells Fargo. Complex was donated by designer Carole Little and her partner, Leonard Rabinowitz.

CON KEYES / Los Angeles Times

Teamsters UPS Hint Progress in Strike Talk

■ **Labor:** Negotiators continue to meet, but neither side sees 15-day standoff ending quickly. Clinton, saying economic feeling effects, urges redoubling of efforts.

By ROBERT A. ROSENBLATT
TIMES STAFF WRITER

WASHINGTON—Leaders of striking Teamsters and the United Parcel Service on Sunday offered hints of progress in their marathon negotiations, though the appeared scant hope for a quick end to the 15-day-old strike.

"We're talking about the issues and that to me is progress, trying to see if we can find some areas of agreement, and the talks are moving along," said Teamsters President Ron Carey. UPS Chairman James Kelly said that although there are dozens of issues

SCHOOL School Set to Open in Former Carole Little Building

Continued from A-1

When teachers have had to pack their classrooms every week, make way for Sunday school.

Of these new accommodations are luxurious by public school standards, complete with glass block walls, built-in shelving, mature palm trees and even a stainless steel cafeteria. Two offices, once occupied by Little and Rabinowitz, will be used as central offices for the 30-year-old teachers, who call themselves "directors."

And the property, at Main Street and Martin Luther King Avenue, is only the start. A panel including wealthy benefactors, Rabinowitz and Lynda Guber, wife of film producer Peter Guber, has promised to raise \$50 million over the next two years to build a high school, dental lab and an underground parking lot on campus.

At the complex deal is the friendship between Guber and Rabinowitz, which connected the two men when they met in the 1980s.

At the time, Rabinowitz was a teacher at the Los Angeles Charter School, and Guber was a businessman doing his first work in the area.

When things connect, they really work. The magnitude of the task would be overwhelming for a small enterprise, and Guber's tenacity of the two teachers was not for the school system.

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APRIL DUDMAN / Los Angeles Times

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CUN KEYES / Los Angeles Times

The former Carole Little headquarters, above, will be home to The Accelerated School. Left, students play a logic game.

September, 8-year-old August and 6-year-old John will trade a long commute to a parochial school for a short walk to Accelerated.

"I was kind of desperate to get out of private school," Clement said. "But I was not interested in putting them in a regular public school."

The accelerated approach was created 12 years ago for two San Francisco Bay Area schools by Stanford professor Henry Levin. It has since spread to more than 1,000 schools across the country, relying in each case on the same basic expectations: that parents will join governing "cadres" and that slower learners will be introduced to the same material as gifted students.

At Los Angeles' Accelerated School, parents have taken their charge seriously, voting to require school uniforms, to expand the school's program and to send their children to parents' who do not complete their three volunteer hours monthly.

Their children have been taught to manage personal bank accounts, using play money earned from good homework and attendance to buy school supplies and toys at the student store. Fourth graders studied the history of flight and aerodynamics, then built model airplanes. Second graders researched the shape and size of dinosaurs, then

knocked on doors of nearby homes, churches and community centers to recruit students, snaring 52 enrollees for the first year.

Three years later, they have a waiting list of 300 and plan to open at the new site with 140 students in kindergarten through sixth grade.

Accelerated School parents who fell behind in their volunteer hours during the academic year are spending afternoons prying bricks from a damaged patio.

Industrial real estate experts say the property never was listed for sale but could have fetched at least \$5 million in the current market. The Internal Revenue Service valued it at \$6.8 million, including the vacant lot across the street, allowing the Carole Little company to write it off as a charitable contribution.

Rabinowitz shrugs when asked whether committing to raise the additional \$50 million is overly optimistic, saying that large corporations and philanthropic individuals want to give to the inner-city, but just don't know how.

His own desire to help was sparked by the 1992 riots, when one wing of the design center went up in flames, but the rest escaped damage because neighbors voluntarily guarded it.

Out of gratitude, he decided he would pay to keep surrounding public schools open longer hours, giving local children a place to play and stay out of trouble. But his offer was met with what he describes as a lukewarm—and worse—reception from principals and administrators.

Not long after that, Rabinowitz decided that the Carole Little company needed more space. Already fed up with the public school system, he thought of recruiting someone to turn the King and Main site into a private vocational school for South-Central Los Angeles youths.

Then, during a February 1994 EDUCATION FIRST! ski benefit in Aspen, Colo.—near the adjacent ranches owned by Guber and Rabinowitz/Little—an alternate plan emerged.

As Rabinowitz remembers it, he and Little were conversing with a group of people who shared their interest in education—and knew a whole lot more about it.

"Lo and behold, they were talking about trying to do something to make education work better," he said. "They wanted a school with a CEO, not a principal. Where? We don't know. Well, we said, we've got this terrific place."

Guber, a former Brooklyn public school teacher, had been discussing with Cal State L.A. ways to hand off the energy generated by her organization during six years of mounting an annual media campaign for education. Expanding The Accelerated School had been a large part of those discussions.

What Guber recalls about the dinner in Aspen is a sense of "Eureka!" when Rabinowitz talked of wanting to turn his property into a vocational school.

"I told him, 'Oh, wait! You can't do anything until you talk to me,'" she said. "I have the most incredible dream. I can go so much beyond that."

Charter Schools Meeting

**September 15, 1997 -- 1:00 p.m.
OEOB -- Room 211**

1. History of Charter Schools
2. Charter Schools Grant Program
3. Key California Charter Schools Issues
4. Q's and A's on California Charter Schools
5. Brief Summaries of California Charter Schools
 - Bowling Green Elementary Charter School
 - Vaughn Next Century Learning Center
 - East Bay Conservation Corps Charter School
 - International Studies Academy
 - San Carlos Charter Learning Center
 - The Accelerated Charter School
 - Leadership High School
6. Operational Plan
 - Charter School Conference Brochure
7. Q's and A's on Charter schools

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1

Divider Title: _____

A Brief History of Charter Schools

Definition

Charter schools are public schools run by groups of teachers, parents or other community leaders that operate with a contract -- or charter. Charters are granted by public groups, such as local school boards or state boards of education. Each charter explains how the school will operate and how well its students will perform. In many states, as long as the school meets the terms of its charter it is freed from rules and regulations covering traditional public schools. However, charter schools are held highly accountable, and if students in a charter school fail to perform at levels described in their charter, or if the school breaks rules that have not been waived, it can be closed. As public schools, charter schools are not allowed to charge tuition, they must be non-sectarian, and they cannot be selective in their admissions.

Background

The concept of charter schools grew out of several other education reforms, including expanding public school choice, increasing accountability, delegating control of education and management decisions to schools, and increasing parent and community involvement in schools. At the heart of the concept is an exchange. Charter schools receive increased autonomy in exchange for performing under increased accountability. The charter school movement grew out of a belief that carefully developed competition among existing public schools and new kinds of schools could provide three things:

1. a broader range of options for families within public education systems;
2. new models of successful schools that traditional schools could replicate; and
3. incentives for school districts to improve their other schools.

Growth

Minnesota became the first state to enact charter school legislation in 1991. The first charter school opened in Minnesota in 1992. Since then, the charter reform concept has spread rapidly. In January 1997, 428 charter schools were open, and in the beginning of the 1997-98 school year approximately 700 charter schools were operating. These numbers are likely to grow rapidly over the next few years.

As of September, 1997, 29 states have enacted varying forms of charter school laws. Federal legislation also provides the District of Columbia with a charter law and Puerto Rico has enacted its own version of charter school legislation. [see chart below] The state of Oregon has no specific charter law but does have authority in state law to establish charter schools and has received a Federal grant.

The specific terms of states' charter legislation vary widely and reflect considerable differences in how the states view the charter school concept. In some states, charter school legislation could be characterized as a relatively modest effort to facilitate modifications in the relationship of existing individual schools to local school districts. On the other end of the spectrum, charter legislation in other states provides opportunities for fundamentally different schools, sponsored by groups such as state boards of education or public universities, as well as local school boards.

States with Charter School Legislation, by Year of First Enactment

1991	1992	1993	1994	1995	1996	1997
Minnesota	California	Colorado Georgia Mass. Michigan New Mexico Wisconsin	Arizona Hawaii Kansas	Alaska Arkansas Delaware N. H. Louisiana R.I. Wyoming	Connecticut D.C. Florida Illinois N.J. N.C. S.C. TX	Mississippi Penn. Nevada Ohio

Federal Role

The 1994 amendments to the Elementary and Secondary Education Act established a role for the Federal government in the charter movement by authorizing funds for charter school development and for a national study to assess the impact of charter schools. This program is designed to address the most pressing challenge shown in surveys to be facing charter schools: a lack of access to start-up funding. This programs also provides funds (up to 10% of the total) for National Activities to support the development of charter schools nationally.

Please attach this chart from the RPP STUDY

Exhibit 2 -- Estimated Number of Charter Schools in Operation, by Initial Start Year

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Public Charter Schools Program

DRAFT

In 1993, The President proposed a public charter schools program, which was enacted in 1994 as part of the reauthorization of the Elementary and Secondary Education Act. This program is providing grants that will help start over 400 charter schools in 19 states, Puerto Rico, and the District of Columbia. The program is helping parents, award-winning teachers, business, museums, and others to start charter schools that are open to all students and accountable to the public for performance.

This program is designed to address the most pressing challenge shown in surveys to be facing charter schools: a lack of access to start-up funding. With the President's leadership, the program has grown from \$6 million in FY 1995 to \$51 million in FY 1997.

In FY 1995, start-up grants were awarded to 10 states and two individual schools for charter school design and initial implementation. FY 1996 grants provided \$8 million to continue these projects, and \$8.8 million for start-up grants in 9 additional states and the District of Columbia. This year more than \$46 million will be awarded to support new and continuation grants.

Up to ten percent of funds available to carry out the Public Charter Schools Program in each fiscal year may be used to conduct National Activities, including the peer review of applications, an evaluation of the impact of charter schools, and other activities designed to enhance the success of the activities assisted under the Public Charter Schools Program.

Funding History of National Activities

<u>Fiscal Year</u>	<u>Appropriation</u>	<u>Available for Nat'l Acts</u>	<u>Used</u>
1995	\$ 6,000,000	\$ 600,000	\$ 600,000
1996	18,000,000	1,800,000	1,200,000
1997	50,897,000	5,100,000	4,000,000

In 1995, national activities funds were used to conduct the peer review of applications and to support the first year of the national study of charter schools. In addition to continuing these activities in 1996, a number of new activities were conducted. A charter schools website (www.uscharterschools.org) was developed. Five sessions on charter schools at the regional IASA conferences were supported. Two national meetings to enable people from around the country to come together to discuss ways to overcome obstacles and ensure the success of charter schools were supported, as were three regional workshops to provide assistance to people operating or trying to create charter schools, and 15 informational meeting in States with new charter laws. In 1997, the first -year report of the national study was released, the study was expanded to include additional cohorts, the website was further developed, and 7 competitions were held to conduct research and development in targeted areas such as assessment and accountability, special education, school finance, equity, leadership training, outreach, and cross-fertilization among charter and other public schools.

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Background:

In 1992, California became the second state in the country to pass charter school legislation. Since then, more than 130 schools have been approved (more than every other state except Arizona). California's law is in the middle of the "strong-to-weak" spectrum of charter school laws. Districts basically approve all charters, without a significant appeal process. The law allowed only 100 schools statewide, with only 10 in any district. The state board has used its waiver authority to waive the 100-school limit, and allowed more than 130 schools to be approved.

Only 34 of California's schools have received Federal start-up subgrants. California has funded a smaller proportion of its schools than other states. This is due to several reasons. California had many schools operating before it received Federal funds. The state allocated most funds for start-up costs. Schools that had already been operating for a year or more did not apply for, or receive, funds for start-up costs. The total number of schools is higher than other states. Finally, the state's process was more competitive, and less equalized in its distribution than charter school subgrant programs administered elsewhere.

Efforts to strengthen the state's charter school law have failed recently, sometimes for partisan reasons. Most policymakers are awaiting the release of a state-funded evaluation of California's charter school program before acting on legislation. This evaluation could be released this October or November.

A. Charter supporters' legislative agenda:

- **Repeal or expand the cap on the number of schools.**
- **Waive the teacher signature requirement for start-up schools; or allow parents to sign petitions for start-up in lieu of, or in addition to, teachers.** Currently 50% of the teachers in a school or 10% of the teachers in a district must sign a petition supporting the creation of a charter school. Advocates want those numbers to include parents as well as, or instead of, teachers.
- **Expand charter granting authority to university and community college governing boards.** Currently only districts, and in rare instances, county education districts can grant charters. State law in Michigan and North Carolina allows state universities and colleges to grant charters.
- **Address legal and liability issues to ensure full funding.** Most California charter schools do not receive as much funding as traditional public schools. In addition, the legislation can make it difficult for schools to exercise legal independence, further complicating financial difficulties.
- **Target low-achieving and low-income students by changing the number of charter schools serving these targeted populations.** The state's current law, by only allowing 10 schools per district, limits the activity in large districts like Los Angeles where many low-income and low-achieving students live. By lifting the state-wide cap or the district limit, these targeted populations would likely have greater access to charter schools.
- **Full facilities funding,** in addition to getting equal operational funding, advocates are also looking for a fair share of state and local resources.

B. Opponents' legislative agenda:

- **Apply building safety codes** that traditional public schools must meet to charter schools. This could possibly close many of the charter schools that have started from scratch. The sponsor, Leroy Green (D), is the author of many of California's very stringent earthquake safety standards for public schools.

C. Other Issues:

- **The California Department of Education is working on a "direct funding pilot"** program with six schools, that would allow these schools to receive funding directly from the state instead of through their district. The pilot has proceeded slowly. If the department does not work out the pilot, sympathetic legislators could enact state-wide changes.
- **Home-based charter schools** continue to cause debate. California is unique among charter states in that around 20% of the charter schools involve some form of home-based instruction. These

schools deliver many unique approaches, but also raise questions. Many states prohibit home-based charter schools.

- **Non-credentialed teachers in Los Angeles raise concerns.** Other states allow non-credentialed teachers to work in charter schools. There are questions about this in Los Angeles. Not required to be certified in California, union issues include collective bargaining.

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California Q&A

Religious Instruction

Q: How do you respond to charges that charter schools are breeding grounds for religious instruction, and even cultist instruction, as in the case of the recent approval of charter schools based on scientology and the teachings of L. Ron Hubbard?

A: Charter schools are public schools, and as such are not allowed to be sectarian in their operations. (In fact, there are statutory requirements covering this that go even farther for charter schools than they do for all public schools under our constitutional language regarding separations between church and state.)

As in all charter schools, the responsibility for approving a charter is given to a public body in that state, here in California it is the local school boards, and they are charged with the responsibility of judging applicants. It is a responsibility of public stewardship to maintain that these schools are not religious. When problems arise, as in the case of all public schools, the Department of Education can investigate.

The Department of Education is preparing workshops with chartering agencies to help them with issues such as this, so that they can exercise their responsibilities appropriately.

Home schooling

Q: Does the President support Home schooling in charter schools? This is another area of the charter school movement that is ripe with possible religious instruction, not to mention inflated attendance figures and consequent over-billing of districts.

A: Home schooling in charter schools is an area that is addressed differently from state to state. And, as in most of these variations, the Department has not taken a stance on aspects of charter school laws. As in all charter schools, however, it is important to reinforce the importance of oversight and accountability. Charter schools are free from many rules and regulations, but they are not free to conduct religious instruction, and they are accountable for financial matters. They must be able to demonstrate to their chartering agency, and the public proper accounting for their revenue and expenditures.

Elitism

Q: Aren't charter schools elitist?

No. When charter schools were originally proposed, many opponents feared they would be used by affluent communities to discriminate against disadvantaged students. This has not happened.

Charter schools are being established in all sorts of communities -- including inner cities, suburbs, and extremely rural locations. On average, they serve roughly comparable numbers of minority students, and in some states, they teach a higher proportion of students of color than are in that state's traditional public schools.

Powerful partnerships have been created to run charter schools. These include the backing of

groups such as housing projects, community development non-profit organizations, businesses, community-driven schools, and organizations such as local Urban League affiliates.

California's Federal Funding

Q. Over 100 California charter schools have not received Federal subgrants. Why has California received so little Federal charter school Funding?

A. Only 34 of California's schools have received Federal start-up subgrants. California has funded a smaller proportion of its schools than other states. This is due to several reasons. California had many schools operating before it received Federal funds. The state allocated most funds for start-up costs. Schools that had already been operating for a year or more did not apply for, or receive, funds for start-up costs. The total number of schools is higher than other states. Finally, the state's process was more competitive, and less equalized in its distribution than charter school subgrant programs administered elsewhere.

California is receiving an increase in its current funding under these newly announced grants. These changes should bring California back to a level of funding that is closer to that in other states. Unfortunately, as long as the Federal funds are focused on start-up costs, and California has so many charter schools that are this mature, this funding is less likely to arrive at existing California schools.

Teacher professionalism

Q. Aren't charter schools eroding the teacher profession since they allow uncertified teachers?

A.

Changing California's charter school law

Q. Since a state of California's size will have to create many more charter schools, if the country is to reach the President's goal of 3000 schools by the year 2000, does the President think California should lift its cap on the number of schools, or allow alternative sponsors to authorize charters?

A.

We are deferring to states in how they establish their charter school programs. However, there are several principles to which the Department believes all charter schools must be held. Charter schools must:

- maintain and reach high academic standards;
- be held accountable for results;
- contribute to equity in education;
- practice sound management; and
- share the lessons they learn with all schools.

When it comes to many of the policies that establish charter programs in states, the Department defers to the states in how they establish their programs. We think these are decisions that state legislatures will have to make. If later, evidence shows some differences in charter laws that lead

to students learning more, or to greater access for all children, then we should make sure that the states have this information.

But in terms of alternative sponsors, let me add one point. California in part serves as an example of local school districts working for successful charter schools in their communities. At this point, only Arizona has more charter schools than California, and almost all of these schools were approved by local districts. I think it is still too early to say what kind of charter school laws should be passed.

Are charter schools resegregating American education?

Q: Could charter schools lead to resegregation of education?

A: Racial and ethnic concentration is an issue we have to look at more, but we are examining it in a new Federally supported study. It is too complex to say what is going on in a simple short answer. Some charter schools do have high concentrations of minority students, while others do not. This is happening in public schools as a result of residence patterns and other factors as well. It needs to be examined in traditional and charter schools.

Some were concentrated as non charters; or they are located in communities that are ethnically homogeneous, where the parents may be more frustrated with their community schools, and doing more to create schools. It's too complex to sum up quickly based on these initial studies.

Much of the concentration that is going on is due to residential segregation, and that is affecting all of education, charters are just a symptom of that. It is disturbing however it happens.

We're concerned about this, and we plan to study it more.

Q. One of the problems in inner cities is flight from the public schools. Do you think that charter schools might draw students and resources away from public schools?

A. These are public schools. Additionally, they draw people back into public schools who had left the schools. Some states have between 10 and 14 percent of the students in charter schools that weren't in the public system before they enrolled in charters. These students are dropouts, delinquents, teen mothers, people coming from home schooling situations, and students coming back from private schools to attend charter schools. These people all represent families, who are also becoming reinvested in public education.

Q. In light of 209, will California changes affect racial diversity in charter schools

A. We sure hope not... (need more here now)

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I. The Accelerated Charter School

Los Angeles, CA

Type of School: New start-up

Charter Status Obtained: 1994

Educational Focus: Located in South Central Los Angeles, this charter elementary school is philosophically grounded in the Accelerated Schools Model that emphasizes high expectations for all students. The Accelerated charter school strives not only to increase academic performance, but also to teach its students social responsibility, increase parent participation, and create a sense of ownership within the school community.

Grades Currently Served: 140 Kindergarten through sixth grade students

Demographics: (1994-95) 2% American Indian, 48% Hispanic, 50% African American
94% of the students qualify for free and reduced lunch.

Interesting Facts:

- During the school's first year, student standardized test scores showed an increase of 21.9% in reading and 41.5% in math.
- The school has established a teacher training program in cooperation with California State University Los Angeles and Pacific Oaks College.
- The school offers English-as-a-second-language (ESL) classes for community members.
- Accelerated moved during the summer of 1997 from their rented church space to a new location that will accommodate 1200 students (Carole Little donated the building).

Contact: Kevin Sved, 213-235-6343

II. Bowling Green Elementary Charter School

Sacramento, CA

Type of School: Public school conversion

Charter Status Obtained: 1993

Educational Focus: Bowling Green Elementary converted to charter status in 1993. Conversion enabled this school to make many changes including the implementation of a single-track, year-round schedule. With the assistance of a California School Restructuring grant and significant work by school staff and leadership, Bowling Green also developed and now implements an integrated-thematic instructional approach based on the teachings of Susan Kovalik. The new curriculum is aligned with the California Curriculum Frameworks. Teaching methodologies used at the school are

grounded in the efficacy approach developed by Jeff Howard.

Grades Currently Served: 750 Pre-Kindergarten through sixth grade students

Demographics: 25% Asian and Pacific Islander, 22% Hispanic, 35% African American, and 18% white. 90% of the students qualify for free and reduced lunch.

Interesting Facts:

- Bowling Green serves one of Sacramento's most disadvantaged areas.
- Bowling Green also serves as a regional site serving orthopedically handicapped and other special needs students.
- Conversion enabled the school to reallocate resources and reduce average class size from 33 to 25.
- The school has begun after-school family programs in math, reading, and other subjects to aid parents in helping their children learn.

Contact: Dennis Mah, 916-433-5426

III. Clear View Elementary School

Chula Vista, CA

Type of School: Public school conversion

Charter Status Obtained: 1994

Educational Focus: Clear view provides an active learning environment where students can develop an understanding of contemporary issues and technology and participate in a partnership between the school, home, and community. The school aims to prepare students to function effectively in a world of new ideas; think independently, critically, and creatively; and to become collaborative workers.

Grades Currently Served: 595 Kindergarten through sixth grade students

Demographics: 25% Asian and Pacific Islander, 50% Hispanic, and 25% White.

Interesting Facts:

- Located five miles north of the Mexican border, the school serves as both a "neighborhood" school and cluster site for Spanish primary language instruction.
- The school is nationally recognized for its innovative and intensive use of instructional technology and was named an International Model Technology School by Cox Communications.
- There are at least 8 computers in every classroom.

Contact: Lesley Woldt, 619-498-3000

IV. East Bay Conservation Corps Charter School

Oakland, CA

Type of School: New start-up

Charter Status Obtained: Received charter in 1995 and opened in 1996

Educational Focus: The East Bay Conservation Corps Charter School is a new charter developed by the East Bay Conservation Corps (an independent California non-profit corporation) and sponsored by the Oakland Unified School District. The objective of the school is to equip students with two areas of competency, the ability to read, write, speak and calculate, and the ability to participate in the life of the community. The educational principles that guide the school's approach include the following; learning is more effective when done through meaningful work, service learning promotes student involvement, and learning opportunities should be varied in order to meet the needs of learners. Students at East Bay will demonstrate mastery of critical benchmarks using a variety of assessment tools including multiple choice tests, portfolios and exhibitions. Students will also develop and present a final project before a panel of educators, business leaders and other students, based on criteria still to be developed in conjunction with the District.

Grades Currently Served: 1,000 Kindergarten through twelfth grade students

Demographics:

Interesting Facts:

- The charter school plans eventually to operate at multiple sites.
- This school is located in the warehouse district in Oakland and serves an at-risk population.
- The students spend time four days a week working in the community on various projects, and then do their classroom work in the evenings and all day Friday.

Contact: Al Auletta, 510-891-3900

V. Fenton Avenue Charter School

Lake View Terrace , CA

Type of School: Public school conversion

Charter Status Obtained: 1994

Educational Focus: Fenton's curriculum emphasizes the delivery of enriched academic skills and concepts through the promotion of pro-social values. Fenton implements a student driven technology plan, not a technology driven student plan. The curriculum is fully aligned with the California Framework in all areas. Fenton endeavors to be a role model for effective education reform.

Grades Currently Served: 1280 Pre-kindergarten through fifth grade students

Demographics: (1994-95) 2% Asian and Pacific Islander, 76 % Hispanic, 18% African American, and 3% white. 91% of the students qualify for free and reduced lunch.

Interesting Facts:

- Received the California Distinguished School Award
- Fenton is one of- if not the- largest charter schools in the nation
- Through conversion, the school was able to reduce class size from 30 to 25, add 16 full-time-equivalent staff including teachers, counselors, a psychologist, special education resource teachers, and security staff.
- Also through their conversion, the school assumed control over 97% of their resources allowing a nearly \$1 million annual increase in on-site expenditures.
- Fenton has a family center and provides after school enrichment classes,
- The school has an extensive child nutrition program serving all students breakfast and lunch.
- Fenton offers English language and citizenship classes to adults four times a week.
- Fenton operates a 12 channel digital satellite station and a Cable in the Classroom connection that jointly allow developmentally appropriate choices and programming.

Contact: Joe Lucente, 818-896-7482

VI. International Studies Academy

San Francisco, CA

Type of School: Public school conversion

Charter Status Obtained: Received charter in 1993 and opened in 1994

Educational Focus: The International studies academy is one of more than 30 international high schools established in this country to promote international education and the study of foreign language. The school's curriculum centers around issues including commerce, trade, and tourism- with an option to pursue the prestigious International Baccalaureate diploma. The school features block scheduling and cooperative agreements with San Francisco Community College District.

Grades Currently Served: 545 Ninth through twelfth grade students

Demographics: (1994-95) 1% American Indian, 36% Asian and Pacific Islander, 33% Hispanic, 12% African American, and 17% white. 50% of the students qualify for free and reduced lunch.

Interesting Facts:

- ISA serves a large educationally-disadvantaged and limited-English proficient

population, and has a special program for hearing impaired students.

- All students engage in community-based service learning projects.
- Extensive career counseling services are supplemented by an internship partnership with the San Francisco State University counseling program.
- ISA has established partnerships with the Bay Area Global Education Project, the World Affairs Council, Project 2061 (science and technology), the Bay Area Writing Project, the Coalition of Essential Schools, and Coopers and Lybrand.

Contact: Cam Nguyen, 415-695-5866

VII. Leadership High School

San Francisco, CA

Type of School: New start-up

Charter Status Obtained: 1997

Educational Focus: Leadership plans to serve San Francisco and its diverse student base by providing an excellent education and developing effective community leaders. They have developed a rigorous curriculum that is college preparatory, supported by innovative technology (each student will have their own E-mail address), leadership programs, service learning, internships, and classes in English, History, Mathematics, Science, Foreign Language, and Art.

Grades Currently Served: 100 Ninth grade students

Demographics: 20% Asian and Pacific Islander, 25% Hispanic, 25% African American, 30% white- including Russian immigrants. The students hail from 21 elementary schools and every zip code in the city.

Interesting Facts:

- Leadership will have a strong partnership with the University which will provide student tutors, counselors, and, next year, pre-service teaching interns.
- Students at the school will be encouraged to take on business internships and participate in volunteer opportunities in the community. Students will spend Friday afternoons in the community taking advantage of other learning opportunities.
- Leadership has numerous business partners and donors, including Golden Gate University which rents classroom space to the school.
- Students have YMCA memberships to allow the school to use the facility for physical education and give the students a place to spend their off campus hours.

Contact: Mark Kushner, 415-951-4767

VIII. San Carlos Charter Learning Center

San Carlos, CA

Type of School: Start-up

Charter Status Obtained: 1994

Educational Focus: The curriculum is based on current research about learning and the grouping of students. Students learn in multi-age classrooms with two or more grade levels of children in one classroom. All instruction is based on the constructiveness learning theory and the theory of multiple intelligences. Children are engaged in hands-on, minds-on learning every day. Each child's personalized learning plan is created by the teacher, parent and student. Outcomes are measured by the new California Learning Assessment System, and the school has articulated its goal of achieving in the top quartile. Other locally developed assessments will also be used including student products, performances, and Rites of Passage Experiences. Parental participation is required.

Grades Currently Served: 120 Kindergarten through eighth grade students

Demographics: (1994-95) 14% Asian and Pacific Islander, 11% Hispanic, 8% African American, and 67% white.

Interesting Facts:

- San Carlos was California's first charter school
- San Carlos provides an after school "Educare" program to support the school's basic instructional day and reinforce learning experiences. Revenues from Educare support instructional assistants in the "regular" classroom.
- San Carlos was started as a vision of the district's superintendent
- 20,000 volunteer hours have been logged in creating and maintaining the learning center.
- Thanadar Software, a student-based company with most of its students coming from San Carlos Charter Learning Center, develops and markets inexpensive games and learning software for children of all ages. A portion of Thanadar's profits are pledged to the school's technology program. Thanadar's President, Greg M. started developing software and web pages when he was age 10.
- There is one computer for every five students at San Carlos.
- San Carlos Community Learning center receives support from Apple, Hewlett Packard, and Oracle.

● **Contact:** Elise Darwish, 415-508-7343

IX. Vaughn Next Century Learning Center

San Fernando, CA

Type of School: Public school conversion

Charter Status Obtained: 1993

Educational Focus: The school serves a population of severely disadvantaged elementary school students, using a full service system including a child-centered curriculum, small classes, integrated technology, preschool education, accelerated English transition for its 900 limited-English proficient students, and an extended 200 day school year.

Grades Currently Served: 1,150 Kindergarten through fifth grade students

Demographics: 95% Hispanic, 4% African American, and 1% white. 50% of the students have limited-English proficiency.

Interesting Facts:

- Vaughn is a 1997 US Department of Education Blue Ribbon School (Vaughn is the first charter school to receive this distinction.)
- Vaughn was awarded the prestigious California Distinguished School award in 1995
- Vaughn serves as a model site for the RJR Nabisco Next Century Schools
- Vaughn is a Danforth Foundation Successful School
- Vaughn participates in California's School Restructuring and Healthy Start programs.

Contact: Yvonne Chan, 818-896-7461

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MEMO

DRAFT

To: Judith Johnson
Deputy Assistant Secretary
Elementary and Secondary Education

cc: Arthur Cole, Sylvia Wright, Kristin Bunce, Mikel Morton, Alex Medler, Jennifer Ryan, Leslie Hankerson

From: John Fiegel
Public Charter Schools Program

Subject: 1998 Operational Plan

Date: September 15, 1997

Attached for your review is the first draft of the Public Charter Schools Program Operational Plan for 1998. The purpose of this plan is to provide a framework for discussion, refinement, and approval of activities to be conducted in the upcoming months to continue implementation of the Public Charter Schools Program.

Introduction

The Improving America's Schools Act of 1994 authorized the Public Charter Schools Program with a purpose to increase national understanding of charter schools by awarding grants to State educational agencies and other eligible applicants to support the planning and initial implementation of charter schools. The Department is charged with evaluating the effects of charter schools, including the effects on students, student achievement, staff, and parents. Additionally, the Department may undertake national activities to enhance the success of charter schools. Lessons learned by charter schools can provide serious accountability for all public schools, and can reinforce, and even accelerate, other education reform efforts. The activities outlined in the attached operational plan will help the Department accomplish these charges and meet the purpose of the authorizing statute.

To provide parents with more choices in public education, we will expand our effort in 1998, to help teachers, parents, community groups, and other responsible organizations to start charter schools that are nonsectarian, do not charge tuition, are open to all students, admit students on the basis of a lottery if more students apply than can be accommodated, and comply with health, safety, and civil rights requirements of other public schools. We need to encourage the growth of innovative public schools that stay open only as long as they produce results and meet the highest standards.

Strategic Plan and Seven Priorities

The first goal of the U.S. Department of Education Strategic Plan, 1998-2002 is to help all students reach challenging academic standards so that they are prepared for responsible citizenship, further learning, and productive employment. Objective 1.6 under this goal is that public school choice supports flexibility and family-community concerns. The performance indicators for this objective are important measures of how well the Public Charter Schools Program is implemented during 1998 and in following years. These performance indicators, as well as the Department's efforts to promote strong, safe, drug-free, and disciplined schools under priority seven of the Secretary's Priorities provide the framework for the attached operational plan.

Next Steps

I recommend that we meet to discuss, refine, and enhance the activities in this plan, and when we are satisfied that they are consistent with what we want to do in 1998, meet with the cross departmental team and others working on charter schools to finalize staff assignments and begin to work on schedules.

Attachment

Public Charter Schools Program

Draft Operational Plan -FY 1998

U.S. Department of Education Strategic Plan, 1998-2002, Objective 1.6 states: Public School Choice supports flexibility and family-community concerns. The performance indicators for meeting this objective are:

- *By 2000, a minimum of 40 States will have charter school legislation.*
 - *By 2002, there will be 3,000 charter schools in operation around the nation.*
 - *By 2002, half of all school districts will make choice available to their students through magnet schools, charter schools, and open enrollment policies.*
 - *By 2002, 25% of all public school students in grades 3-12 will attend a school that they or their parents chose.*
-

Core strategies (from the Strategic Plan):

► Engage the Public:

State meetings. Offer States with new laws (currently NV, MS, OH, PA) up to \$30K each, and States with older laws but no federal grant money and little charter activity (currently AR, HI, NH, RI, SC, WY) up to \$10K each to conduct informational/outreach meetings to encourage interest and understanding of charter schools requirements in their respective States. *Lead responsibility:* OESE core team. *Schedule:* to be determined.

Regional meetings. Plan and implement through selected Comprehensive Technical Assistance Centers (CTACs) three regional workshops with an estimated cost of \$50-\$75k each to enable teachers, universities, museums, organizations focused on educating disadvantaged children, local businesses, and others to begin to think about how they may initiate or contribute to the creation of a charter school. *Lead responsibility:* OESE core team. *Schedule:* to be determined.

PR Campaign. Plan and support a public relations campaign designed to provide evidence (videos, brochures, radio and TV spots, etc.) of good charter schools, especially those whose charters are being renewed, to counter the press about a few bad schools. *Print information.* Develop a series of articles, briefing papers, and OP-Ed pieces on charter schools targeted to relevant stakeholders, selected trade journals, general interest magazines, newspapers, and other publications. *Lead responsibility:* OESE core team. *Schedule:* to be determined.

Information Exchange. Provide support in the amount of \$3-5K to small groups for information sessions to bring charter school operators, consultants, and others to advise groups on charter school development. This would allow, for example, some States that are considering drafting legislation to bring in experts from other States. *Lead Responsibility:* OESE core team. *Schedule:* to be determined.

Charter schools website. Continue to support and develop the charter schools website to provide information for charter school developers and potential developers, operators, and chartering agencies on starting and running a charter school, State legislation, curriculum development, policy development, school finances, legal issues, and other issues. The website includes an overview of charter schools, news and announcements, a school information exchange, a resource directory, and links to other sites. *Lead responsibility:* OESE core team. *Schedule:* Website is enhanced on a continuous basis.

Parent's Guide. Develop and disseminate widely both English and Spanish versions of "A Parent's Guide to Public School Choice" written in simple, non-jargon, accessible language. *Lead responsibility:* OESE core team with the Office for Public Affairs. *Schedule:* planned to be available for national charter schools conference, November 3-5, 1997.

High level visitors to charter schools. Provide information and assistance to the President, Vice President, Secretary, and other Cabinet members and Assistant Secretaries so that they might visit charter schools to give them credibility locally, as well as raise awareness nationally. *Lead responsibility:* OESE core team. *Schedule:* to be determined.

► **Financial support and technical assistance:**

Charter schools grant program. Manage pre-award, award, and post-award tasks associated with the charter schools grants program to provide financial assistance to States and charter school developers for the planning and initial implementation of charter schools. *Lead responsibility:* SIP discretionary grant team. *Schedule:* Deadline for new grant applications is scheduled for January 30, 1998 with new awards to be made by April 10, 1998. Continuation awards will be made by August 28, 1998.

National conference. Convene a three-day national conference to provide a forum for founders, administrators, and teachers of charter schools to share and receive successful strategies and methods of overcoming common challenges; facilitate networking among charter school operators, technical assistance providers, State department of education representatives, and U.S. Department of Education staff; familiarize charter school directors with Department programs, resources, and staff that can be of assistance to charter schools; ensure that charter school directors are aware of federal rules and regulations they must meet and waivers available to them; and receive feedback on programs and needs of charter schools, and plan for follow-up activities that would

strengthen charter schools. *Lead responsibility:* OESE core team. *Schedule:* November 3-5, 1997.

Federal programs guide. Develop and disseminate to charter school practitioners, State agencies, chartering agencies, and others a "Charter Schools Guide to Department of Education Programs." This will be a condensed version of the Department's Guide, listing those programs for which charter schools are eligible, including formula programs such as Title 1 and Title 6, as well as discretionary grant programs. Eligibility aspects that are unique to charter schools depending on their status as independent school districts or as schools within a school district will be discussed. *Lead responsibility:* OESE core team. *Schedule:* Planned to be available for the national conference, November 3-5, 1997.

Technical assistance to chartering agencies. Complete review of and disseminate *two publications*: "A Guidebook for Chartering Agencies," developed for the Department by the RAND Corporation, a comprehensive guide covering all aspects of a chartering agency's responsibilities in chartering schools, and "The Charter Review Process," developed by the Southeastern Regional Educational Lab, SERVE, which more specifically covers the application and review process for chartering agencies in approving charter schools. SERVE will offer a *workshop* for chartering agencies at the upcoming national conference that could be used as a prototype for follow-up workshops in States and districts. *Lead responsibility:* OESE core team. *Schedule:* Publications and prototype workshop to be available for the national conference, November 3-5, 1997. Follow-up workshops to be scheduled.

State-level policy makers. Establish a series of workshops -- with OERI's, ECS's, and NCSL's help -- at the national conference for State-level policy makers considering charter policies and legislation. Support follow-up work in States with teams of leaders with questions about charter school policy issues. *Lead responsibility:* OESE core team with OERI Policy Institute. *Schedule:* Workshops, November 3-5, 1997; follow-up to be scheduled.

Technical Assistance to D.C. Facilitate and document, through the Region III Comprehensive Technical Assistance Center, the meetings of the D.C. Charter Schools Network, a group of charter school practitioners who meet at least four times a year to engage in critical dialogue around such topics as instruction, curriculum, assessment, professional development, and governance. *Lead responsibility:* OESE core team. *Schedule:* to be determined.

► **Research and development:**

National study. Continue to support and expand the National Study of Charter Schools

which is being conducted by RPP International in partnership with the University of Minnesota's Center for Applied Research and Educational Improvement and Boston's Institute for Responsive Education. *Annual survey.* The results of the second annual survey of all charter schools conducted in the spring of 1997 will be released, and the public data set will be expanded and made available to those interested in conducting secondary analysis of the survey results. The third annual survey will be conducted in spring, 1998. *Longitudinal assessment of student achievement.* The ethnographic study will be expanded to include a third cohort of approximately 20 charter schools and 4 comparison sites in States with "new" charter laws, increasing the totals to 92 charter schools and 32 comparison sites. Achievement data will be gathered in the spring of 1998 for all three cohorts. *Policy studies.* The research team plans additional site visits to six of the intensively-studied schools for examination of policy issues affecting charter schools. *Lead responsibility:* OERI Cross Departmental Team members. *Schedule:* Interim reports and findings will be available by January 1998 and 1999.

Targeted research studies. Award contracts by September 30, 1997 to conduct two-year studies to analyze the effects of charter schools in special education and in assessment and accountability. Similar contracts will be awarded in the fall of 1997 to study school finance issues and charter schools. There were no successful competitors in FY 1997 to conduct a study on fairness and equity issues, so this area will need to be revisited. *Lead responsibility:* OERI for the school finance and assessment and accountability studies; OSERS for the special education study. *Schedules:* to be determined.

Model development. Award contracts by September 30, 1997 for the development and assessment of a model leadership training program for charter schools (2 contracts), a demonstration program for fostering cross-fertilization among charter schools and other public schools (3 contracts), and a model outreach program to attract community institutions, parents, teachers, and principals into founding and operating charter schools (1 contract). *Lead responsibility:* OESE core team. *Schedules:* to be determined.

Evaluation of the federal program. Plan an evaluation of the impact of federal support for charter schools. *Lead responsibility:* Planning and Evaluation Services, OUS members of the Cross Departmental Team. *Schedule:* Planning will begin in the fall of 1997. The evaluation will start in late 1998 or early 1999.

Title 1 and charter schools in the national study. Complete a review and determine the dissemination of a report analyzing Title 1 funding data from the national study's first annual survey of charter schools. *Lead responsibility:* Planning and Evaluation Services, OUS. *Schedule:* The report is expected to be ready for dissemination by October, 1997.

► **Outreach:**

IASA Conferences. Share information about charter schools and how they are an integral

part of the education reforms to increase public school choice, autonomy, and accountability. Three sessions will be held: a one-hour session on Priority Seven, Every School Will be Strong, Safe, Drug-Free, and Disciplined; a three-hour institute on public school choice options; and a session on the federal Public Charter Schools Program.

Lead Responsibility: OESE Strong Schools team, IASA Institute team, and OESE core team. *Schedule:* October 16-18, November 16-18, and December 14-16, 1997.

School reform networks and technical assistance providers. Facilitate and encourage connections between the New American Schools, the Coalition of Essential Schools, and other school reform networks, and the organizations providing and brokering technical assistance to charter schools, such as the National Charter Friend's Network. Encourage pilot programs where the technical assistance expertise of these networks can be made readily available to people chartering schools. *Lead responsibility:* OESE core team. *Schedule:* to be determined.

Organizations representing disadvantaged students. Tap into the President's Race Initiative to facilitate discussions among groups such as the NAACP, National Council of La Raza, Urban League, and others about the opportunities that charter schools might provide to their constituents. *Lead responsibility:* OESE core team. *Schedule:* to be determined.

NSBA and chartering agencies. Develop a working relationship with the National School Boards Association to encourage them to work with State affiliates to develop workshops for chartering agencies. *Lead responsibility:* OESE core team. *Schedule:* to be determined.

Charter Schools Teams:

OESE Core Team: Arthur Cole, John Fiegel, Mikel Morton, Jennifer Ryan, Alex Medler, Leslie Hankerson, Kristin Bunce

SIP Equity and Choice Discretionary Grant Team: OESE Core Team; plus Sylvia Wright, Steve Brockhouse, Shelton Allen, Valerie Rogers, Lynette Kee, Richard Kress, Sandra Shever, Bill Mattocks, Edith Harvey, Margie Bednarik

Cross Departmental Team: OESE Core Team; plus Pat Lines, Judith Anderson, OERI; Cathy Grimes-Miller, OGC; Kirk Winters, Stefanie Stullich, Lisa Towne, David Cleary, OUS

Strong, Safe, Drug-Free and Disciplined Schools Subteam: Cross Departmental Team; plus Gerry Tirozzi, Judith Johnson, Maria Ferguson, Art Cole, OESE; Frank Sobol, Deborah Inman, OERI; Ivonne Jaime, OVAE; Phyllis Barajas, OBEMLA; Ray Meyers, Rhonda Weiss, OSERS; Charles Masten, OPE; Frank Lopez, OGC; David Berkowitz, OCR; Kris Regan, OM

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1997

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***“Strengthening Education
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**CHARTER SCHOOLS
NATIONAL CONFERENCE**

November 3, 1997 marks the beginning of an intensive three-day conference focusing on the charter school. In response to President Clinton's "Call to Action for American Education in the 21st Century," the U.S. Department of Education will provide a national forum for founders and administrators of charter schools to:

exchange successful strategies for overcoming common challenges;

familiarize charter school directors with Department of Education programs, resources, and staff that can be of assistance to charter schools;

facilitate networking among charter school operators, technical assistance providers, state department of education representatives, and U.S. Department of Education staff;

strengthen charter schools by addressing concerns of charter school directors and the U.S. Department of Education;

learn about federal rules and regulations that apply to charter schools and become familiar with waiver programs and other means of regulatory relief;

provide input on programs and help plan for later activities that will strengthen charter schools.

WHO SHOULD ATTEND

As educators committed to improving the quality of education in America, you will not want to miss this opportunity to gather with others who share your goals and concerns. Conference participants will include:

Charter school directors and founders

State education agency staff responsible for charter school programs

Policy makers

Technical assistance providers

Questions about the Program?

Call: (405) 325-3760 or (800) 203-5494

CONFERENCE AGENDA

Monday, November 3

"The Federal Role in Charter Schools"

7:45 a.m.-8:45 a.m.	Continental Breakfast
9:00 a.m.-10:30 a.m.	Welcome and Overview of U.S. Department of Education Programs
10:45 a.m.-11:45 a.m.	State Sessions
12:00 noon-1:45 p.m.	Luncheon/Keynote Address
2:00 p.m.-3:15 p.m.	Workshop Sessions on Federal Programs
3:30 p.m.-4:45 p.m.	Repeat of Sessions
5:00 p.m.-5:30 p.m.	Focus Groups
6:00 p.m.-7:00 p.m.	Meet and Greet Reception

Tuesday, November 4

"Common Challenges & Successful Strategies"

7:45 a.m.-8:45 a.m.	Continental Breakfast
9:00 a.m.-10:15 a.m.	General Session
10:45 a.m.-12:00 noon	Workshop Sessions
12:15 p.m.-2:00 p.m.	Luncheon/Keynote Address Richard W. Riley U.S. Secretary of Education
2:15 p.m.-4:45 p.m.	Workshop Sessions
5:00 p.m.-5:30 p.m.	Focus Groups
6:00 p.m.-8:00 p.m.	Reception at U.S. Capitol

Wednesday, November 5

"Digging Deeper and Looking Ahead"

7:45 a.m.-8:30 a.m.	Continental Breakfast
8:45 a.m.-10:15 a.m.	Workshop Sessions
10:30 a.m.-12:00 noon	Closing Session

RELATED EVENTS

Pre-Conference Workshop

Sunday, November 2

"Planning and Developing a Charter School"

9:00 a.m.-5:00 p.m. Pre-Conference Workshop
(For those in the early stages of applying for charters in the mid-Atlantic region. Registration is limited.)

Post-Conference Workshops

Wednesday, November 5

1:00 p.m.-5:00 p.m. Targeted Working Sessions
(SEA Staff, Chartering Authorities, Technical Assistance Providers, and Policy Makers)

PROGRAM HIGHLIGHTS

"Strengthening Education Through Innovation and Public School Choice"

CHALLENGES FACING CHARTER SCHOOLS

Through a combination of panels, round table discussions, and workshop presentations, conference participants will share the successes, problems, and issues of charter schools. Sessions will feature exemplary models of practice and provide concrete ideas and strategies for creating and operating quality charter schools. Topics will include:

Standards and Assessments

Facilities

Business Operations

Gathering and Mobilizing Resources

Creating Partnerships

Legal and Liability Issues

RESOURCES AND INFORMATION FROM THE U.S. DEPARTMENT OF EDUCATION

Participants will receive information and assistance on Federal programs. Department staff and successful charter operators will provide information and insights on:

The Federal Charter School Grant Program for Start-Up Funds

Title I, including determining eligibility and operating "schoolwide" programs and how charter schools can use these resources

Federal rules and regulations that apply to charter schools, waiver programs, and other means of regulatory relief

- Individuals with Disabilities Education Act (IDEA), including a briefing on the recent reauthorization of IDEA, and how changes affect charter schools
- The Office of Civil Rights, with guidance for charter schools in appropriately:
 - serving children with disabilities
 - serving language minority children
 - recruiting and admitting students

SESSIONS FOR PEOPLE WORKING OUTSIDE CHARTER SCHOOLS

In addition to sessions targeted at people starting and operating charter schools, information and workshops will be available for:

- State-level policy makers
- Charter granting entities
- State education agency staff that work with charter school programs
- Education reformers from outside the charter school movement
- People planning to apply for a charter

The conference will include pre-conference workshops on Sunday for people in the early planning stages. Following the conference conclusion on Wednesday at noon, a series of half-day workshops are scheduled for policy makers, charter granting entities, and technical assistance providers. If you are interested in attending or presenting at the pre- or post-conference workshops, please indicate on the registration form.

CONFERENCE HOTEL

Renaissance Mayflower Hotel
1127 Connecticut Avenue, NW
Washington, D.C. 20036
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The Renaissance Mayflower Hotel will be the site of all conference sessions and activities. The hotel is located at 1127 Connecticut Avenue, NW in the heart of downtown Washington, D.C. Just four blocks north of the White House and one half block from the Farragut North Metro Station, the hotel is easily accessible to all major attractions. Built in 1925, the Mayflower Hotel sets the standard for elegance and beauty, and has been the site of inaugural balls of United States presidents since Calvin Coolidge.

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	<u>National</u>	<u>Dulles</u>
Via taxicab	\$10 - \$12	\$45 - \$50
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REGISTRATION INFORMATION

Registration is limited and by invitation only. Participants should register by October 15, 1997 to ensure space. Invitees responding after October 15 cannot be guaranteed registration. If you have not received an invitation and wish to attend, please call Alex Medler at The U.S. Department of Education, (202) 205-9786.

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Qs and As for Charter Schools Report

States and Laws

1. Report lists principles of bills, does that mean you endorse these principles?

No, it does not. There are several principles that the Department believes all charter schools must be held to. Charter schools must:

- maintain and reach high academic standards;
- be held accountable for results;
- contribute to equity in education;
- practice sound management; and
- share the lessons they learn with all schools.

However, when it comes to many of the policies that establish charter programs in states, the Department defers to the states in how they establish their programs. This report only includes these aspects of charter laws to provide a context for examining activity in states.

2. This report describes many different kinds of laws. Does this study determine if there are certain policies that make a difference. For example, you can see that Michigan and Arizona have created more schools in a shorter period of time. Is that because their laws allow entities other than local districts to create charters? If this is so important, what can we do to encourage all states to have these kinds of laws?

We think these are decisions that state legislatures will have to make. If later, evidence shows some differences in charter laws that lead to students learning more, or to greater access for all children, then we should make sure that the states have this information.

But in terms of alternative sponsors, let me add one point. There are states that give the local school districts the primary, or only, responsibility for granting charters. Some of these states are having a lot of charters form as well. Colorado and California are both states where practically every charter is eventually approved and granted by the local district, and these states will have 50 and 122 schools next year. Florida passed legislation last year, and while some critics were disappointed that local school boards had so much influence in that state, there will be nearly 40 charters approved for operation next year. I think it is still too early to say what kind of charter school laws should be passed.

School Size

3. Why are they so small?

This is a very encouraging aspect of the charter school movement. There could be several reasons.

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Some charters start small, and plan to grow over time. For these schools, the small average size could be a function of how new the charter movement is. Five years from now the average charter school could be larger.

In other cases, people have opened charters specifically because they want their children to have smaller schools. Some parents and teachers involved in charter schools are hoping to provide more intimate and orderly learning environments, where instruction can be more personalized for each student.

4. According to your report, most charter schools have fewer than 200 students. Could this be the source of success in charter schools? Or is it their increased flexibility?

It is too early to say which aspect of charters is likely to cause success. They share many advantages that previous research has demonstrated leads to successful schools, but they also have several new barriers that most schools don't have to face as they strive to improve. (We can go into these if you want more detail, pluses include size, focus and shared vision, shared responsibility and control of staff and budget; minuses include lack of funds, facilities issues, business challenges, and politics of self-governance.)

Charter schools come in a variety of forms, including some that have more than a thousand students. We are looking into the factors that influence success in charter schools. School size may certainly contribute to the success of the smaller charter schools --small schools research would certainly indicate that this would be an important factor. Our hope, however, is that increased flexibility will lead to innovations in charter schools and that our research will help determine those factors that lead to success so that they can influence other public schools.

5. Do charter schools represent a significant reform, if they only serve a few thousand children total?

Charter schools are only one part of our overall strategy for education reform. We believe they are one mechanism for implementing high standards, professional development and accountability. However, despite their relatively small size, this is a movement that is growing very quickly. President Clinton has called for the creation of over 3000 charter schools in over a decade. Nearly 500 schools operated last year, and another 200 or so will be open in this fall. Their impact can also be much deeper than the children in the individual schools. They are expected to, and are beginning to, have a broader impact on the rest of public schools. For some of the people involved in the charter movement, it is this broader impact that is the whole reason charters exist at all.

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JUSTIFICATION FOR THE LEVEL OF FUNDING

6. Why are they getting so much money, attention and resources if they serve so few kids?

Not all charter schools are this small, and to be honest, they are not receiving a great amount of money.

First, many charter schools are quite large; for example, a couple of Los Angeles schools serve more than a thousand students.

Second, the start-up grants that these schools receive from the Department average around \$30,000 to \$40,000 each. Compared to the overall cost of opening and operating a school, these grants represent a relatively small investment.

However, if these schools succeed, and if they are finding new ways of operating public schools, we may be able to use their successes elsewhere. In part, these schools can serve as laboratories for the rest of public education.

7. If so many charter schools are converted from existing schools that were already open, why are you asking to spend \$100 million on their supposed "start-up" costs?

Charter schools, whether converted from existing schools or starting from scratch, have significant start-up costs. Schools that are starting from scratch have to develop their plans, ensure that their buildings meet health and safety codes, hire staff, develop a curriculum, offer professional development, and all the other many activities associated with starting a new school. Public schools that convert to charter school status may already meet health and safety codes, but they still have all of the start-up activities associated with opening a new school, including hiring staff, offering training, developing a curriculum, recruiting students, etc. According to our survey, 68 percent of newly created schools and 46 percent of pre-existing schools cited lack of start-up funds as a barrier to implementing charter schools.

8. What is the Federal role in supporting charter schools? Aren't start-up funds something that should be provided by states?

A majority of charter school developers said that the lack of start-up funds was the greatest barrier to starting their school. Federal funds help stimulate the establishment of charter schools, and they are critical for improving the quality of charter schools. We see the charter schools program as a partnership between the Federal government and States. States could certainly offer start-up funds, but many are not so we are responding to the needs of new schools to have start-up capital. Federal funds have the added benefit of giving new charter schools resources for planning without drawing from resources within the local educational system. Thus Federal start-up funds may help lessen the

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conflict that can occur when a school district is impacted by the opening of a new school.

Conversions and from Scratch Schools

9. With all of these private conversions in Michigan, Arizona, Colorado and Minnesota, are we just funding a voucher program in a different way? Aren't these the same schools? What makes them public schools? Are they really open to everyone? How many of these charters are converted private schools?

It is important to remember that these schools are becoming public schools. Under a voucher system, private schools can still charge tuition, remain sectarian, and be selective in their admissions. As a charter school, a converted private school may no longer charge tuition, they can't be sectarian and they can't be selective in their admissions.

Most importantly, these schools are ultimately accountable to public entities. If they don't perform, and operate by principles of public education, they can, and hopefully will, be shut down. We need to work with states and districts to make sure that is happening. This is very different than private schools receiving vouchers.

10. Many charter schools are converted public schools. Are they really different, or are they making any significant changes?

(Gerry, need a better answer here, see the highlighted profiles for some examples.)

Some of the country's most successful charter schools are converted public schools. They include the Vaughn Next Century Learning Center, Fenton, and schools like Horizon. (Tell the Horizon, Vaughn Story, etc.)

11. At the bottom of page 30, the report describes a converted school. By converting to a charter, this school was able to save money by purchasing services from vendors rather than the school district. With this savings, they were able to reduce class size. If smaller class size is desirable, shouldn't all schools convert to charters in order to save money and be able to reduce class size? Why do schools have to convert to charters in order to save money and reduce class size?

If charters are successful in saving money, we may be able to take lessons and apply them more broadly. That is one of the advantages of charter schools.

However, some of the things that charter schools do to save money involve hard choices. As schools of choice, parents choose these schools because they are willing to accept some advantages while losing some aspects of traditional public schools. For example, some charters don't have big sports programs, bands, or theaters.

Discrimination

12. One of the problems in inner cities is flight from the public schools. Do you think that charter schools might draw students and resources away from public schools?

These are public schools. Additionally, they draw people back into public schools who had left the schools. Some states have between 10 and 14 percent of the students in charter schools that weren't in the public system before they enrolled in charters. These students are dropouts, delinquents, teen mothers, people coming from home schooling situations, and students coming back from private schools to attend charter schools. These people all represent families, who are also becoming reinvested in public education.

13. What happens to the students that are left behind?

The idea is to change the whole system, not just the charter schools. Charters may put pressure on the whole system to change. Imagine, if every school had a coherent vision of high levels of student learning, where every adult in the building was accountable for all students learning, where every child and every parent wanted to be in that building with those teachers, and where the school did what they thought was necessary to ensure all its students learned? It's not just about what happens in the charter schools. This is the vision that is behind our activities for all schools in Goals 2000, IASA, etc.. Second, it's not a giant investment, it is venture capital to leverage changes in the amount of energy, enthusiasm and hard work people can put into our public schools.

We should not excuse any community from not improving all schools. Charter schools are part of the public school system and, if successful, can provide lessons to help other public schools improve.

Charter schools may create greater pressure to improve all schools. School boards, faced with tough questions from charter schools, may ask similarly tough questions of all schools, and if they do, perhaps they will not accept failing schools anywhere in their district, that's the hope. It is too early to know if it will work.

When public schools convert, it is not just the schools that are already at the cutting edge. Some of the successful converted public schools started out at the bottom of their districts list, in terms of performance and attendance, and have made amazing progress. That is something that brings along the kids, whom the traditional school system had already left behind, and tolerated leaving them there.

In addition, the kids who are "left behind" can sometimes get on with other reforms. (Explain a "release valve" affect, and the ability to implement a reform in a district that a minority of parents would have been able to stop otherwise. The charter takes a slightly different direction, and the community needn't be torn apart over a philosophical difference between a few adults on the school

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board. Horizon story)

14. Could charter schools lead to resegregation of education? I see that exhibit 14 indicates concentration of minority children in a handful of charter schools.

Racial and ethnic concentration is an issue we have to look at more, but we are examining it in a new study. It is too complex to say what is going on. Some charter schools do have high concentrations of minority students, while others do not. This is happening in public schools as a result of residence patterns and other factors as well. It needs to be examined in traditional and charter schools.

Some were concentrated as non charters; or they are located in communities that are ethnically homogeneous, where the parents may be more frustrated with their community schools, and doing more to create schools. It's too complex to sum up quickly based on these initial studies.

Much of the concentration that is going on is due to residential segregation, and that is affecting all of education, charters are just a symptom of that. It is disturbing however it happens.

We're concerned about this, and we plan to study it more.

15. I see that in Massachusetts, Michigan and Minnesota there are charter schools serving very high proportions of students of color. Would I be allowed to start a charter school that would serve predominantly Irish-American children? Once we start allowing schools that are racially or ethnically homogeneous, where does it stop?

No, you could not start a school for Irish-Americans if you denied admission to anyone else. You could start a school that attempted to interest students in learning, and it could include a deep examination of the achievements of Gaelic culture, as part of a way of entering all the areas of academic learning that must be addressed by a successful charter school.

There are schools for deaf students, charter schools for drop-outs, schools for kids who want to learn in active settings, and schools that best serve kids who need order, discipline and desks in straight rows. It is O.K. to create schools that look different from one another, and focus is a plus, but discrimination should never be tolerated.

16. Are you concerned about patterns of racial concentration at a school? What if these are the result of deliberate policies that favor or exclude some races or classes of students?

This first year study claims that it "did not find evidence that charter schools engage in discriminatory admissions practices." However, it's too early to say for sure what is going on. If any schools are discriminating, that's too many. The challenge is to stop that without curtailing the innovation that is going on, and without interfering with legitimate choice by parents.

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At this point, you can find an anecdote for everything in the charter world, good and bad. That's why we need to work on better research and evaluation, but this is just a first step.

Special Education and LEP and disadvantaged students

(Gerry, we are working on new answers to special ed and Title I questions)

17. It looks like educators in Minnesota are trying to take special ed students out of mainstream education by placing them in charter schools. Isn't the trend to place special ed students in regular classrooms? Are you trying to reverse that? For example, 15 schools have over 25% special ed students and 2 have 100%.

Some of these are very unique schools. Minnesota has a school for the deaf. It is the only school in the state where children can learn American Sign Language and still sleep at home each night.

Other schools are for drop outs, kids who weren't in any stream, they were completely out of the water.

18. On page 22, the report states that some charter schools are reluctant to classify students as special ed students, because they think all students should receive individualized education plans. Couldn't they use this as a way of covering up previous instances of counseling special ed kids out of the school, or as a way of justifying delivering inadequate services to children with special needs? We realize the researchers say this would be difficult to determine, but isn't that your job?

Yes, and we are examining this issue. We have another BAA out just for this topic.

Not enough data is available yet to determine, also there are cases of schools serving these kids with alternative delivery and high expectations.

Also, since charters are accountable for results, if they don't educate these kids they will hopefully be closed.

19. As long as schools are stating a fear of going bankrupt if a child with expensive needs shows up at their school, isn't it likely that many of these schools respond to this pressure by illegally discriminating against these kids and encouraging them to go elsewhere? Even if they accept the students, since they don't have the money, are the students really getting the services they deserve?

Again, we hope to learn more, this could be, or it could be other things going on.

In Colorado they buy an insurance from districts, (pat Grippe story)

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Maybe they need to form BOCES, or regional service districts, of charters

(Maybe there needs to be a pool of federal resources charter schools can draw onto to help defray these costs, so that charters are no longer afraid of the impact kids can have on their small budgets. The important thing is that these students receive the services they need.)

That's why we're working with sponsors, schools and SEA's, and conducting activities such as a major conference this fall that will help schools network among themselves and work on solutions. We also have Broad Agency Announcement to solicit work by technical assistance providers.

20. Two-thirds of all charter schools claim that they are eligible for Title I funds, yet only one-half claim to receive them. What are we doing to ensure that disadvantaged students are getting the resources they deserve in charter schools? If schools feel like they're not getting the resources that should come with disadvantaged students, are we creating incentives for charter schools to not serve these students -- to discriminate against them?

(Gerry, we are working on answers to this question)

Who Starts Charter Schools and Why

21.If three-quarters of the charter schools were created by one or two leaders, what happens when these leaders leave? I thought these were supposed to be broad-based partnerships? Why are only one in four charter schools involving broad coalitions?

It is a lot of work, if professionals take the lead in many, that's not so bad. However, if their turnover remains high that could generate problems.

Remember, in many cases these schools are small schools, where 1-2 leaders may be O.K.

There is also a difference between leadership and involvement, thousands of people are donating 100,000's of hours.

22. It says on page 28 that only 12.7% of the schools serve special needs kids, and that only 9.5% of the schools were opened to involve parents. Is that acceptable? I thought these were public schools that are supposed to serve everyone. They're starting to look more and more elitist with these numbers.

(The previous question could come from misinterpreting the table on page 28. Schools leaders were asked to explain the reasons why they created the school. They could list more than one choice. Or later, they were asked to say which was the most important reason. If someone interpreted the question as "what was the only reason" why you opened the school, they might ask the following

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inappropriate questions. (A scholar of special education interpreted the earlier ECS survey along these lines and wrote up a similar set of conclusions based on this mistaken/perverse analysis).

This analysis is wrong.

People could answer more than one, it is not the only reason, all usually say their school is designed to serve all children.

Profit Making/Finances

23. Many of the schools that were preexisting private schools, said they became charters for financial reasons. Are these for-profit companies making money out of tax dollars? Where is the profit coming from? Is it from discriminating against students that cost more to teach, scrimping on services or facilities, or paying teachers even less? Are charters just a cover for private companies to take money from public education.

Non-profits often contract with for-profit entities, like many LEAs are allowed to do under state laws.

This is not just going on in charter schools, but in many districts as well.

Overall, this is not a lot of money, but there is growing interest, we don't know how it will play out.

Financial reasons are not always profit, sometimes it is just a little bit more operating funds that allow increased levels of service.

24. If charter schools can make a profit, why can't other public schools make a profit? And, if charter schools are running a profit, while operating with less money than traditional public schools, then, are we over funding education in this country? Is it stupid to pour another \$100 million into these schools if some of them are putting money in the bank with what we give them now?

Other public schools do this too, it could be a problem everywhere. But we are concerned.

If they save money we hope to take lessons and apply them elsewhere.

Most won't make a lot of money, they're all reporting a lack of funds, and a need for finances and start-up money, not a problem with too much money and no place to invest it.

Autonomy

25. What types of regulations, if waived, would benefit charter schools?

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Charter schools seem to benefit from the removal of State regulations. In fact, our report indicates that Federal rules and regulations were perceived to be a barrier to only six percent of the charter schools surveyed. The types of State regulations that would benefit schools if waived, really depends on the type of State regulatory climate. For instance, some States have a more centralized curriculum, so charter schools will have greater autonomy over their curriculum. Others have more administrative controls, so charter schools could benefit from flexibility on school management rules such as scheduling, purchasing requirements, or age of students served. Or charter schools might benefit from greater autonomy over their school finances. The actual regulations will vary by State.

General Questions

26. What is the downside of charter schools?

Charter schools are not the silver bullet solution to educational problems. Certain pitfalls are inherent in the start-up of any new program or idea. For example, some schools could mismanage funds or try to profit at the expense of students. As the system gets up and running, however, these schools can be detected and closed. Closure in mid-year could disrupt students. Charter schools will need to have a strong accountability system so that these issues are surfaced and addressed. Another pitfall is that, if charter schools are not supported, and therefore fail, the parents and teachers involved in the charter school will make up a whole new constituency of people disenfranchised with the education system.

Questions That Might Generate Controversy

27. "Illegal" schools in Colorado

Page 15 the Study shows that two-thirds of the pre-existing schools in Colorado were private schools that converted to charter status. This is prohibited according to Colorado law. If this particular state can't even hold schools accountable, (or hold district sponsors accountable) for a simple rule that prohibits the conversion of private schools, how can we expect to adequately monitor other equally important aspects, like discrimination, religious instruction or tuition?

At least one of these schools is located in a former private school building. The school's original directors closed a private school, dissolved its board of directors, and then donated the facility to a new team of people (a team that did include some members of the previous private school's board). These people applied for a charter as a new group. Now this is quite likely what is happening with these schools.

However, these are issues that need to be examined, and there is an added level of responsibility that comes to everyone involved, including chartering authorities, SEAs, and the Federal government. All of us must find ways to make sure that charter schools are meeting the requirements and laws set before them. Just because they are deregulated, does not mean they can do whatever they like.

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28. Selecting Students in oversubscribed Schools

This study indicates that only 39% of schools with excess demand used a lottery to select students, 41% used a first-come-first-serve system, 10% used a combination, 10% used some other method, (see page 20). I believe the Federal legislation says we will only fund those that use a lottery. By my rough calculation, if 400 of 480 schools are receiving federal funding, and meanwhile only 200 of 480 schools use a lottery, do you know which of the remaining 280 schools are illegally receiving federal funding? What do you plan to do about this? And what should we do with these schools using combinations or "other methods"? (page 20)

This is an issue we are working on

These numbers are only for oversubscribed, so it is not out of the total of all 480 schools. It is not an accurate analysis to say that this percentage reflects all schools. Others focus on at-risk students, and screen to serve kids who dropped out, or who are adjudicated, these would be "other", or non-lottery type settings. You might want to examine the legislation so that these kinds of schools are not precluded from receiving Federal funds.

It is also not clear how many are oversubscribed, or if they are growing over time, and may not have dealt with this issue yet.

Ideally all would be lottery, unless they are serving a special population, for which they have specifically designed the school. The task is to work with states and districts to make sure that they are holding schools to the appropriate standards of conduct, and we can use Federal funding as a lever in that work. We will continue to look into this, and attempt to make sure everyone has access.

29. How can you explain the lower rate of special education students in charters? Are charter schools serving students with special needs, or with those who pose greater challenges? (See page 23 for the main summary comparisons). It appears that either charter schools are counseling out special needs students or else they are under reporting the number of special needs students that they have in their schools. For example, 7.4 percent of students enrolled in charters schools received special ed services prior to attending the charter schools as opposed to 10.4 nationally.

There are several possibilities, it varies from state to state. Some states are serving a larger proportion of these students in charters. If this (the charter movement) is an experiment, we need to examine those states more closely and see what is best to take from one state and work to replicate these things elsewhere.

But there could be several reasons:

Many students are coming to charter schools (10 to 14%) who weren't in public schools before. These kids may not have been diagnosed, or weren't in programs previously. This along, might account for much of the difference. Thus, maybe the kids with special needs are in the charters, but

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the labels haven't come with them.

Some parents are reluctant to report their child's label to the new school, because they are hoping to leave that behind and have a fresh start. (This is likely to raise problems later, when push comes to shove, and parents want the protections, and extra services.) In fact, some schools report over representations of kids with mild learning disorders, who wouldn't have received IEPs, but who were underachieving, and facing challenges in reading, or attention.

The availability of resources at traditional public schools in big districts may make parents reluctant to pick these new schools as they start up. Parents might be reasonably skeptical, and choosing to go with successful traditional public schools that have demonstrated an ability to meet their child's needs.

Many are choosing, it's just a little less.

30. Some charters, according to your study, are counseling parents to send kids with special needs to other schools that can better serve their needs. Isn't this illegal? What are you doing about that? Do these "public" schools receive funding? (Page 22) Why aren't charters serving as many LEP students as traditional public schools?

(Need a better answer here)

There is one level in which some of this might be legal. (check on this). Some charters are part of the district legally, and a school in a district can tell parents that another school in the district provides the least restrictive environment, or better services, and suggest, or the child to go elsewhere. If charters are not separate legal entities, they may be doing the same thing many traditional public schools would do when facing these challenges.

If this is not the case, then there is work that needs to be done. We must work with sponsors on stewardship issues.

The issue of LEP students, points to importance of providing technical assistance to communities, so that all people would be able to organize charters. We are spending money on BAA for demonstration project for outreach, and cross-fertilization, so that many other players can explore, and perhaps use the charter mechanism to improve and make schools that serve all kids.

There is a growing interest among all sorts of communities, some examples (NAME, Urban league, etc.)

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Questions Without Prepared Answers

31. Why is there such a high teacher turnover in charter schools?

32. You want 3000 charter schools by the year 2000. What is a realistic number of how many there will be by then? What is the real goal, what are you trying to accomplish?

33. Why would states limit or not limit the number of charter schools?

Gerry – arguing for caps will not get us to 3000 by the year 2000.

34. How many charter schools have been closed so far, and why? What happens to students when charter schools close?

35. Name five charter schools that aren't working? (If he can't name them) If you can't tell me, are you monitoring them well enough? Are we out on a limb here? If there are some, what is being done about that?

THE WHITE HOUSE

Office of the Press Secretary
(San Francisco, California)

For Immediate Release

September 20, 1997

OPENING AND CLOSING REMARKS BY THE PRESIDENT
IN ROUND TABLE DISCUSSION ON CHARTER SCHOOLS

San Carlos Charter Learning Center
San Carlos, California

11:19 A.M. PDT

THE PRESIDENT: Thank you very much. First, thank all of you for coming here today and sharing your Saturday morning. I thank the Superintendent for his really marvelous remarks. He talked about all the things that we have in common -- I saw a living symbol of his dedication to education above all else, and one thing that we have in common that he didn't mention -- if you look closely at his tie you will see it is a pattern of golf balls and tees. (Laughter.) And on this beautiful Saturday morning he's here with us. (Laughter.)

Let me thank your instructional coordinator, too, for being here, leaving her 11-day-old baby. I would like to see the 11-day-old baby, but I think it's -- where's the baby? A wise mother leaves the baby outside. (Laughter.)

Hillary and I are delighted to be here. And I want to spend most of my time just at this panel today. But I thank all of you for coming because I believe in charter schools and I believe they are an important part of helping us to lift our standards and renew our schools and achieve the kind of educational excellence that all of our children need as we move into the 21st century.

I congratulate the San Carlos Learning Center for being the first of its kind in California, which obviously makes it among the very first in the United States.

Let me just give you a little, brief personal history here. When I was governor of my state for 12 years, I spent a great deal of time working on school reform -- and so did Hillary -- spent lots of time in the schools, talking to teachers, talking to parents, talking to students, dealing with issues of curriculum development and teacher training and all those things. And when we were active in the 1980s, the state of

Minnesota became the first state in the country to pass a public school choice law, to give parents and their children more choice among the public schools their children attended. I think we were the second state to pass that law. And we used it quite a lot.

Then when I began to run for President in 1991, Minnesota became the first state in the country again to pass a charter school law, recognizing that sometimes it wasn't enough just to give the parents and the students choices, but that we needed to give the educators and the parents and the students with whom they worked options to create schools that fit the mission needed by the children in the area; and that if you gave them options and held them accountable, we might be able to do something really spectacular. Then five years ago today, I think, California became the second state in the country to adopt a charter school law, and then you became the first of those schools.

In 1994, I passed legislation in Congress to help us support more charter schools. By the end of 1995 there were about 300 charter schools in the country. Today there are 700 charter schools in the country. Many of them have been helped by the program we passed in Washington in 1994.

The historic balanced budget agreement that we just passed into law includes the largest commitment to new investment in education since 1965 -- among other things, expansion of Head Start programs, more funds to support computers in the schools -- I'll say more about that in a moment -- our America Reads initiative to help make sure every 8-year-old can read independently, and the biggest increased investment in helping people go to college since the G.I. Bill passed 50 years ago, tax credits for the first two years of college, credits for the remainder of college, IRAs, Pell Grants, work-study positions. All these together mean that for the first time ever we can really say, if you're responsible enough to work for it, no matter what your income or your difficulties, college is now a real option for you in America -- for every single American. And I'm very proud of all of that.

But one of the things that was in this balanced budget that didn't get a lot of notice is enough money for us to help to set up literally thousands more charter schools in America. Because excellence in education is more than money. And from my point of view, having spent years and years and years working on this, we need two things -- we need a set of national standards of academic excellence that will be internationally competitive in basic subjects. And then we need grass-roots, school-based reform, because education is the magic that takes place in every classroom, and indeed in every student's mind, involving every teacher, every student, and also, hopefully, support from home.

So that's why these charter schools are so important to me. And that's why we've tried to help a lot more schools like San Carlos get started on the path that you've been on now for some years.

MORE

For people who don't know exactly what they are, let me say that charter schools are public schools that make a simple agreement: in exchange for public funding, they get fewer regulations and less red tape, but they have to meet high expectations, and they keep their charter only so long as their customers are satisfied they're doing a good job.

As I said, we've gone from -- the day I took office, there was only one charter school in America, January of '93. Then a couple years ago we were up to 300; now there are 700. And what started as a movement in Minnesota and California now encompasses 29 states; 27 more states have passed charter school laws.

These funds in our budget, as I said, should allow us to set up several thousand more over the next four years. Today I am pleased to announce that we're going to release \$40 million in grants to help charter schools open. Start-up costs are often the biggest obstacle. And in states that can't afford to help, it's a terrible problem. I see a lot of people nodding their heads out there who have had experience with this.

So we have curriculum development costs, teacher training costs, new technology costs -- all these things can help. The \$40 million we're releasing today, of which about \$3.4 million will come to California, will help us to establish another 500 charter schools in 21 states. So we'll go from 700 to 500 in one pop here.

And as I said, pretty soon -- and if all the states will join in, we obviously can help all of them -- we'll have well over 3,000, perhaps even over 4,000 by the year 2000, which is enough to have a seismic echo effect in all the public school systems of America. So that's what we are trying to do.

Let me say that there are a couple of problems that we're going to face. Last week, the U.S. Senate, by a very narrow margin, supported an amendment that would make these charter schools funding that I just announced the last such announcement that would ever be made, because it would lump all the education funds together and arbitrarily distribute them to the state without regard to whether these programs were continued or not. And in the process, it would abolish very specific and highly successful education reform programs like the charter schools, where we work with local communities and school districts. It would abolish our highly successful effort to put computers in the classrooms -- I'll tell you how much movement has happened on there in just two years -- and to create safe and drug-free schools. I think that would be a mistake.

The House of Representatives recently passed, although the Senate opposed them, an amendment that would prohibit us to pay for -- not to develop, but to pay for -- a

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non-political, private organization to develop voluntary national tests of excellence in mathematics and reading. I think that would be a mistake. This is the first time, last year, in history that our students in elementary schools scored above the international average in math and science. We're doing much better in America, but we don't test all of our kids, we just test a representative sample. I think we need to know how we're doing based on a common standard.

So we have these problems in the Congress, and if either one of these provisions makes it into the final bill I will have to veto it. So I hope that we can continue to work on moving forward in the right direction. And in that connection, I'd like to say a special word of appreciation to Congresswoman Anna Eshoo, who I think is one of the -- absolutely -- even I would say this if I were in Washington -- she really is one of the finest, most forward-looking members of the United States Congress, and she's made a big difference in our country today. (Applause.)

Now, running these charter schools, as we are about to hear, is not easy. It's not self-evident how to do all this. It sounds great to say we'll cut you free of red tape and bureaucracy; you have to perform at a higher level, you've got to get the parents involved. There are all kinds of practical problems, and we'll hear about some of them.

The Secretary of Education, Dick Riley, is going to convene a national conference on charter schools in Washington this November to bring together teachers, administrators, parents, others who are interested in this to share best practices and look to the road ahead. But just think about where we can go with this. If we go -- we've gone from one to 700, to 500 more, with a budget that calls for funds for 3,000 more -- just this year's budget alone that will be funded starting October 1st, if we get the funds for it, will give us enough funds for another 700 -- or 900 to 1,000 schools.

So this movement can sweep the country and can literally revolutionize both community control and standards of excellence in education if we do it right. That's what the panel is about.

And before we start, let me just thank some of the business leaders who are here today for their commitment to educational excellence -- Regis McKenna, David Ellington, Brook Byers, Terry Yang, Paul Lippe. And I'd like to say a special word of thanks to Larry Ellison who is up here on the platform. He's the chairman and CEO of Oracle Corporation.

Two years ago this week, I met with Larry and a number of other high-tech executives to talk about another one of my passions, which is to connect every classroom and library in every school in America to the Internet by the year 2000. And

that, like everything else, it turned out to be more complicated. It sounded great, but we not only had to connect them, we had to make sure we had the hardware, the software, and the trained teachers to do the job.

So we got this group of business people who knew about all this, who are working very hard to try to make sure that we can do that, give all the support services to every school. We got the Federal Communications Commission to give what amounts to a \$2.25 billion a year subsidy to schools, to lower the rates they have to pay to hook on to the Internet. But to give you an example of what we can do when we work together, since we made that announcement two years ago, California has 65 percent of the schools connected, which is twice the percentage you had two years ago, and four times as many classrooms connected as just two years ago. That shows you how quickly we can move.

And Larry has not only sponsored the San Carlos Learning Center, but yesterday he announced Oracle's promise to spend \$100 million in a foundation to help schools across America who need support to get the kind of connection to the future through telecommunications technology that we all want. So thank you, Larry, for doing that. (Applause.)

So this is a good news day. but what I want to do now is to turn it over to the panel and let's get into the facts of the charter school movement and see -- hopefully, by being here today, this will encourage the 21 states who do not have charter school legislation to adopt it. It will encourage the Congress to fully fund the charter schools program for the next four years. And it will help us to take what you have done here and spread it all across America in a way that will guarantee international standards of excellence in the education of all of our children.

Thank you very much.

* * * * *

MRS. CLINTON:

Well, I want to thank all of you for sharing your experiences and success stories about charter schools. And I think that there are just a couple of general points that I would make. First, what the Congresswoman just said is critical, when she talked about test kitchens, because my husband I have said together and often that there is a good public school in every community in America, but the problem is they don't learn from each other and they don't get to scale in the sense that we know

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what works, but for too many years we have not been motivated sufficiently to do what worked in every school.

And so we are now seeing, with the charter school movement, an effort to do just that -- to take these, in some ways, old-fashioned ideas that are now married to technology and very much motivated to be successful by the demands of the new economy, and put them into action in schools across the country.

When we talk about parental involvement, that is a very old-fashioned idea that we have had to relearn. When we talk about empowering teachers to design curriculum, that, too, is something we know will work if we unleash the creative energies of teachers. When we talk about giving students a chance to explore and learn and develop their own capacities, that's what many of us try to do with our own children, but which we deny to other children because of the bureaucratic structures and expectations of the old system.

So there are many aspects of what we heard today which would be very familiar in any setting 30 or 40 or 50 years ago in many parts of America, but which we somehow lost track of as we got bigger and bigger and schools became impersonal and anonymous, and really we lost our way in the very important connections that have to be made between homes and schools, students and teachers, and the understanding of how community has to support that magic.

Secondly, I think that the charter school movement should not be seen as a threat to public schools. It should be seen as a liberation of public schools, and particularly teachers and administrators who for many years have known what should be done, but have felt unable to do so. (Applause.) And there is certainly nothing hidden about the President's agenda on this. He wants every school, whether it is formally called a charter school, or not, to act like a charter school.

And that is our real objective in the charter school movement -- not only to create thousands more charter schools, but to take the lessons from the charter school movement and literally infect every public school in America, so that parents are standing at the door of principals' offices, so that teachers will not feel so oppressed in their classrooms, but will join together to demand from administrators and school boards what they know their children need, and for businesses, which have in many ways the greatest stake in the future of our public school system, to be constantly be prodding for academic excellence as in many communities they now prod for athletic excellence.

So the charter school movement is really a rallying cry that we hope will not only create more charter schools like the ones we have heard about today, but encourage and give courage to public school patrons, teachers, and students around the country to say, well, you know, if Jose could find a home in

a new charter school in San Francisco, why can't all the Joses in our public schools feel similarly welcomed and supported? And if Gregg can go into competition with Oracle in the 6th grade, why can't all the Greggs in America feel similarly encouraged to pursue their own intellectual excitement?

So we're very much appreciative of what all of you on the front lines are doing from San Francisco to South Central, LA, to San Diego, to right here in this community. And we really do appreciate the zeal with which you have expressed your excitement about this, because we do want it to infect and to be contagious so that, as Yvonne said when I saw firsthand visiting her school, every child will feel that that child is special and valued and appreciated. And that's really what we're hoping to achieve with this kind of effort.

So thank you for doing what needs to be done in American public education. (Applause.)

THE PRESIDENT: First of all, let me say I agree with everything she said. (Laughter.) I'd just like to make a couple of brief point to build on what Hillary said. I want to say, first of all, I have no hidden agenda here; I believe the only way public schools can survive as the instrument by which we educate our children and socialize them and bring them together across all the lines that divide us is if all of our schools eventually -- and, hopefully, sooner rather than later -- are run like these charter schools. That's what I believe. I am not running for office anymore. I have no political interest in this. I am think about what our country is going to be like 20, 30, 40, 50 years from now.

And you know what Tom said about the industrial model -- that's part of the problem. A lot of our schools are organized on an industrial model -- a lot of our middle schools are almost -- are organized for when families were like Ozzie and Harriet, instead of like they are today. There are a lot of organizational problems. It's also true that our schools get money from a lot of different places and have to suffer rules from a lot of different places, and a lot of people think if they give up their rule-making, they won't matter anymore. And in some way, the most important person here is the Superintendent because he's here supporting this instead of figuring out how he can control it. And I think that's important. (Applause.)

And so Hillary and I have been working at this business for a long time now -- seriously since 1983 -- really seriously. There has been a dramatic change in the attitudes of the teacher unions, which is positive. There have been dramatic advances in the attitude of administrators, which is positive.

But I just want to say, we cannot -- there are a lot of people who believe in the information age, with things changing as fast as they are and with standards needing to be as

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high as they are, that we ought to just basically send everybody money and let them do whatever they want to about education, and forget about the public education network -- let it sink or swim. The problem with that theory is that the short-term costs to people who got left behind would be staggering.

But if we want to preserve excellence and the socially unifying impact of public schools over the next generation, I am telling you, every school in the country has got to become like this one. The power needs to be with the parents, with the children, with the teachers, with the principals. And those of us who are up the lines somewhere, up the food chain, what are we interested in? We're interested in what Kim said -- we're interested in results. We don't need to make rules. We're interested in results and we want to be able to measure them. We want to know our kids are going to be all right and our country is going to be all right.

Let them make the rules in the schools. Let them figure it out. And then education will be something that will get bright young lawyers to leave their more lucrative law practices to do something that doesn't pay as much, but makes them feel good when they go to bed every night and get up in the morning. That's what we want. And until every school is run like that, you and I should not rest.

Thank you. God bless you.
(Applause.)

END

12:35 P.M. PDT



Jonathan_Schnur @ ed.gov
04/02/97 07:25:00 PM

Record Type: Record

To: Michael Cohen, William R. Kincaid

cc:

Subject: Charter school info

Terry mentioned that you were looking for an update on status of charter school reports. Here it is:

1) The first year report of the major charter school national study.

This has gone to the printer, and will be ready for public release by April 15th. We have blocked some time on the 15th for Secretary Riley to announce results from this in Washington, however this would also lend itself to a Saturday radio address instead.

2) Guide for School Boards and other chartering agencies. This has been completed and not yet publicly released. This could be released anytime as part of a speech on the importance of accountability in charter schools and careful review of charter proposals. //✓

3) Announcement of competition for FY97 charter school start-up grants. This will be announced in the next week or so. No event is currently planned -- this is announcing availability of new funds, rather than grant awards. This could be put together with announcing the study results as part of a radio address.

One other new possible forum for an event. The Mayor of St. Paul, MN will be hosting a "charter school expo" during the second week of May in St. Paul. Both the mayor and superintendent in St. Paul are supportive of charter schools, and want to push harder for more schools. So far, the district has chartered at least 5 schools, including City Academy, the nation's first charter school.

I am getting more details -- and the event is still under development -- but I think it will include all of the existing charters showing what they are doing, and inviting parents and the the rest of the community to come learn about them. They may also be hoping to sue the event to encourage the formation of new charter schools. Let me know if you would like me to keep you posted as I get more info.

FYI: Gerry Tirozzi will be testifying to in the House next Wednesday on charter schools. We should have a draft by Friday.



Jennifer_Ryan @ ed.gov

04/07/97 10:13:00 AM

Record Type: Record

To: William R. Kincaid

cc:

Subject: Re: web site

No problem--

The URL is <http://www.uscharterschools.org/>

The passwords are then "choice" in the first field and "movement" in the second.

Let me know if you have any difficulties--

Jennifer

Reply Separator

Subject: web site

Author: William_R._Kincaid@oa.eop.gov at Internet

Date: 4/5/97 3:29 PM

Message Creation Date was at 5-APR-1997 15:29:00

Jennifer--

Could you please give me the information for taking a look at the new charter schools web site? I realize it isn't public yet.

Thanks.

Bill



UNITED STATES DEPARTMENT OF EDUCATION
OFFICE OF THE SECRETARY

FAX TRANSMITTAL

TO: Bill K. / Mike (don)

ORGANIZATION: _____

PHONE NUMBER: _____

FAX NUMBER: 456-7028

FROM: Jon Schur

PHONE NUMBER: 401-3598

MESSAGE: PUT - 2-3 items from

Notion Study on (name) school
reported in attached ED Daily article.

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2 PAGE(S) TO FOLLOW

EDUCATION DAILY

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Vol. 30, No. 70
Friday, April 11, 1997

Praising Arizona: Riggs Aims To Open Charter Laws Wider

A House subcommittee chairman who hopes to draft new charter schools legislation praised Arizona this week for the freedom it grants innovative schools.

Comparing the existing 26 state laws, Rep. Frank Riggs, R-Calif., said Arizona is "on the cutting edge of charter school reform, where 10 percent of public schools are charters operating outside restrictive regulations."

Riggs probed state and federal officials about how to expand and further decentralize the experimental schools during a hearing Wednesday before his House Early Childhood, Youth and Families Subcommittee.

He is planning to write charter school legislation with Sen. Joseph Lieberman, D-Conn., and wants to target federal funds to states with the most permissive laws (ED, March 7).

Stemming Board Power

During the wide-ranging, four-and-a-half-hour hearing, Riggs quizzed policymakers and scholars about which entities can grant charters under different states' laws. "My concern is that vesting control [solely] in local boards can be limiting," he said.

An education policy advisor to Louisiana Gov. Mike Foster agreed.

"Unless applicants can appeal [a charter rejection] or bypass the local board, there is not enough pressure on local boards to take charters seriously," said Louann Bierlein, who also co-wrote a Hudson Institute report on charter schools (ED, Aug. 8, 1996).

Some laws allow state education departments
(more on p. 2)

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Affirmative Action Limits Likely After Court Ruling

Schools and colleges that were already scaling back affirmative action programs may be forced to limit them even further, in light of a federal appeals court ruling this week.

From student aid to high school outreach, many observers believe schools must continue to shift their emphasis from race-based programs to efforts that target a larger segment of "disadvantaged" students.

The U.S. Ninth Circuit Court of Appeals on Tuesday upheld California's Proposition 209, which outlaws affirmative action in public college admissions and state hiring (ED, April 8). The decision is expected to spur similar initiatives in up to a dozen other states.

Supporters of race and gender preferences are discouraged by a nationwide erosion of diversity in student enrollment at schools and colleges, while foes say affirmative action is all but dead.

(more on p. 3)

Riggs Aims To Open Charter Laws Wider (Cont.)

and higher education institutions to grant charters, and advocates such as Bierlein consider this flexibility a key component of "strong" charter laws.

Riggs also wanted to know how many charter schools are treated as their own local education agency, completely separate from an existing school district. An Education Department official didn't have exact figures but said only Massachusetts, Arizona and Michigan allow that arrangement.

Federal Funds, Federal Role

Although Riggs called the hearing to examine federal barriers to the formation and operation of charter schools, a soon-to-be-released ED study found that only 6 percent of charter school operators say federal regulations are a major difficulty for them.

Moreover, ED officials are just as enthusiastic about charters as Riggs is.

President Clinton wants to boost the number of charter schools to 3,000 by the turn of the century, up from about 450 today, in part by just about doubling federal spending on charter schools from \$51 million this year to \$100 million in fiscal 1998 (ED, Feb. 7).

Gerald Tirozzi, ED's assistant secretary for elementary and secondary education, agreed with Riggs that boosting federal funds for charter school start-ups would encourage more states to adopt charter laws and to reconsider their limits on the number of experimental campuses they will allow.

In fact, Tirozzi envisioned an explosive growth of the charter school movement, predicting as many as 40 states would have laws within three years.

Venture Capital

With \$100 million, ED could increase the average size of subgrants from states to schools from \$35,000 today to \$100,000, Tirozzi said, comparing the funds to venture capital for a small business.

The upcoming ED survey, scheduled to be released next week but previewed at a superintendents' conference recently, shows that start-up funding is the most often-cited difficulty for charter schools (ED, Feb. 24).

"The federal program was designed precisely to address this need," he said.

But lawmakers from both sides of the aisle questioned Washington's involvement in charter schools.

"Why is there a federal role in charter schools at all?" asked Rep. James Greenwood, R-Pa. "Why can't states provide seed money?"

And Rep. George Miller, D-Calif., suggested requiring state matching grants.

Tirozzi said the federal government has "a role in stimulating innovation in public schools, in partnership with state and local agencies."

Integration Tool?

ED's upcoming study will show that charter schools have racial compositions roughly proportionate to statewide averages for public school, but serve a slightly lower proportion of students with limited English proficiency than the regular public schools.

While that might go some way in assuaging critics' early fears that charter schools would increase segregation, many school districts themselves are increasingly segregated, said Amy Stuart Wells, an associate professor of education policy at the University of California at Los Angeles (ED, April 8).

The federal and state governments should encourage charter schools to be tools to reduce racial isolation, she said. And Riggs was intrigued by her position that states should allow students to cross districts to attend charters.

Riggs may hold more hearings on charter schools, though none are scheduled, and Senate education policymakers haven't taken up the issue. —Laureen Lazarovici

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... Mike C/ Bill K
THE HARD QUESTIONS

Homegrown

The death of Albert Shanker, the remarkably effective leader of the American Federation of Teachers, has refocused attention on the great New York City school strikes of 1968 and the community school boards that emerged in their wake. The massive disruption of the strikes resulted in a new system of school government in New York City, largely shaped to satisfy Shanker. But, in the end, it also gave a modicum of satisfaction to the black leaders and their liberal allies who were demanding that the schools be managed by local communities. That system expired shortly before Shanker's death. Last December, the New York state legislature, acting after recurrent scandals involving community board members (some had taken bribes from aspiring principals), stripped the boards of most of their power.

Despite such scandals, though, the issue of community control is far from dead. The struggles of 1968 sought to bring urban government closer to the people it affected. For the schools, this meant an arrangement that gave parents more say in their children's education. At the time, the city's middle-class Jews and Italians had no great quarrel with the schools. Their children did well enough, and they provided most of the jobs in the school system's bureaucracy. It was struggling blacks and Puerto Ricans who were most upset by the highly bureaucratic system and who saw the solution in more direct democracy, in schools run by local boards elected by parents. With the support of the Ford Foundation, three communities soon set up experimental school boards. One of them quickly fired a group of teachers, many Jewish (as indeed were so many of the teachers in the system then), whom the board felt were unsympathetic to its aims and to black students. Strikes called by Shanker's union closed the school system down again and again.

"The 1968 battle over school decentralization in an obscure Brooklyn district called Ocean Hill-Brownsville ripped apart New York City as nothing has before or after," John Kifner wrote in *The New York Times*, commenting on the end of the school boards' power. "It played an early role in the deterioration

of relations between blacks and Jews. New York liberals ... were split into warring camps. Albert Shanker rose in stature from local union chief to hero to some and anti-hero to others."

Now, after nearly thirty years under local elected boards, New York City's schools are again under a strong chief and an appointed central board. Sadly, we are in an age in which we place more faith in powerful central administrators than in community control. Mayor Rudolph Giuliani fought to gain greater control over the schools; Mayor Richard Daley of Chicago has already achieved it; and Mayor Richard Riordan of Los Angeles, after his second electoral victory, is expected to seek it. Should we expect anything to change as a result? The past, alas, tells us no.

Thirty years ago, the left attacked centralized bureaucracies for their rules, their distance from the schools and their inability to improve the achievement of minority groups, in particular blacks. The left demonized the union and its single-minded leader, who it claimed was so fully committed to the interests of the teachers that those of the students took second place. Today, interestingly, the attack on school bureaucracies comes from the right. Conservatives offer the most fervent support for an odd descendant of community control: charter schools. These infant institutions are now flourishing in a number of states that permit parents and educational entrepreneurs to start schools. Though funded by the government, they are free of local bureaucratic controls and operate, therefore, more like private schools. Backed by conservative think tanks and business interests, charter schools promise to improve the achievement of minority and low-income students.

But charter schools raise many of the same fears that community control did thirty years ago. Can we trust local groups to run schools independent of centralized bureaucracies? Won't we find corruption as public money is distributed to various private groups? Won't bizarre school programs suddenly turn up funded by taxpayers' money?

The editor of this magazine, Michael Kelly, attacked charter schools in December. In "Dangerous Minds" (December 30), Kelly reported on an altercation at the new Marcus Garvey School in Washington, D.C., a charter school, which, as its name suggests, is committed to black nationalism. In the altercation, several students reportedly assaulted a white

female reporter and threw her out of the school. "Charter schools, and similar ideas like the use of vouchers to pay for tuition in private schools, enjoy support from the right and the left for essentially the same reason," Kelly wrote. "Conservatives like charter schools because they think the schools' autonomy will allow the teaching once again of conservative virtues—old-fashioned education, discipline, religious instruction. The race-and-gender left likes charter schools because autonomy will allow the teaching of its values: Afrocentric schools for blacks and feminist schools for girls, and so on." Actually, the race-and-gender left does not actively support charter schools. They do well enough

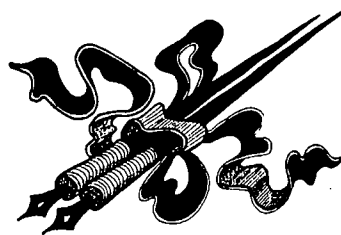
in the public schools, though it is true that charter schools in black neighborhoods will generally place strong emphasis on Afrocentric education.

Of course, the unions are suspicious of such autonomy. Their members may lose jobs as

parents desert public schools and patronize the new charter schools. Understandably, Shanker reprinted Kelly's attack in his weekly advertisement in *The New York Times* shortly before his death. Both have a point: charter schools may teach nonsense. But at least the nonsense has the support of parents, who can always shift their children to the public schools, or from one charter school to another. Charters come closer to restoring parents' control over the schools than any tinkering with big-city school bureaucracies, and that is a virtue in its own right. Furthermore, there is good evidence that schools that link parents, teachers and children in a common enterprise, accepted by all, are the most effective. Competition should ensure that the new charter schools deliver what parents most want—a good education for their children. Besides, there is a way to judge whether these schools perform well: national standards and national tests. Even if the schools teach nonsense, the public—and the parents—can at least find out if their students can read, write and calculate.

Shanker opposed vouchers and was wary of charter schools. But his most statesmanlike position was his steady support for national standards and national tests. That is the answer to Kelly's concern over charter schools—not, as some suggest, preventing these schools from coming into existence and maintaining power with central-office bureaucrats.

NATHAN GLAZER



teachers are designing their own educational programs, running their own schools and giving everyone lessons on what it takes to educate at-risk students

By MELANIE MARKLEY
Staff

THEY ARE bright, energetic 20-something teachers on a mission.

They didn't go the usual route to get to the classroom.

They didn't even plan to teach until an organization called Teach for America - in the idealistic spirit of the Peace Corps - recruited them from universities to commit at least two years of their lives to inner-city schools.

But now, after only a few years in Houston classrooms, they are designing their own educational programs, running their own schools and giving everyone a crash course on what it takes to motivate and educate at-risk adolescents.

"We're all on a mission," said Chris Barbic, "and we've been on one for three or four years now."

Barbic and Sheilah Kavaney, both 26, co-direct Project Y.E.S., a 150-student middle school adjoining Rusk Elementary. Aside from academics, the school places a heavy emphasis on community service projects in the eastside neighborhood.

Kelly Garrett, 27, directs Project Chrysalis, a 100-student middle school in portable buildings on the Cage Elementary School campus in southeast Houston. Students ride Metro buses most days to pursue class-related projects outside the classroom.

Michael Feinberg, 28, runs KIPP Academy, a southwest Houston intermediate school housed in portable buildings behind Sharpstown Middle. In an environment charged with high expectations and motivational slogans, the school's 130 students quickly learn that there are "no excuses" when it comes to getting an education.

All the academic programs promote similar philosophies. Students spend longer days in class and are expected to attend Saturday classes and summer school. When not in class, students have their teachers' home phone numbers so they can call with homework questions.

All the schools, now in their second year of operation, have become campus charters in the Houston Independent School District. As charters, the schools are given more flexibility to bend the

rules and to innovate.

Despite the teachers' youthful years, minimal experience and lack of traditional training in a college of education, HISD Superintendent Rod Paige said their charter proposals - reflecting a missionary zeal and a willingness to go beyond the usual boundaries - were impressive.

"The care and commitment was clear in listening to them talk to sell their concept," Paige said. "As the administrator in charge, I just took the point of view that people who feel this deeply about an issue are going to do something good. We were interested in seeing what happens."

Already, the mostly Hispanic, largely low-income schools have success stories to tell.

At KIPP, which stands for Knowledge Is Power Program, the school was rated "exemplary" last year after 100 percent of its students passed the reading portion of the Texas Assessment of Academic Skills and 95 percent passed math.

At Project Y.E.S., which stands for Youth Engaged in Service, students last year ranked first in the state in math and third in reading among middle schools with an Hispanic enrollment of 95 percent or more.

And at Project Chrysalis, the students' passing rate on TAAS last year jumped 325 percent in math and 150 percent in reading.

There is little magic in what they do to achieve success.

For one thing, the schools are smaller, making it easier for teachers to know all their students and to give them more personalized attention.

But there is also an atmosphere of long hours, hard work and intense drive. As Garrett at Project Chrysalis explains it, "It is a relentless pursuit of learning and educating and never stopping for any reason."

Garrett, a graduate of Rhodes College with a degree in religious studies and international studies, first experienced teaching in a north Houston elementary school where for 2 1/2 years he watched promising students go on to middle school and fall through the cracks.

One of his favorite students left his

class to go to a magnet middle school but got expelled when he was caught with a knife. Another student, who impressed Garrett with his penchant for memorizing new words from a dictionary, was sent to a juvenile detention center after he was expelled from middle school for fighting.

Garrett knew that something wasn't working, and he wanted to change it. He and a fellow teacher wrote a charter proposal, and Project Chrysalis was born.

Students at the school spend their mornings in class and their afternoons engaged in class-related projects. They write and perform Greek plays, tend gardens and even helped design and install an irrigation system at a neighborhood center. They use student passes to ride Metro buses to museums, plays and the downtown library. At the end of the day, they spend time writing journals and reflecting on what they've learned that day.

"They want to expand our knowledge," says eighth-grader Phillip Guzman, 14. "They make learning fun."

Garrett said the students are rarely absent, and the program is so popular in the community that there is a waiting list of youngsters wanting to get into it. As Garrett sees it, the students are getting a lot more than just book learning out of their education.

"Our kids are helping to make a positive impact in their community on a daily basis," said Garrett. "They are planting gardens for homeless people. They are painting murals that hang in community centers. They are putting on Greek plays to teach other kids and entertain parents and also learn something in the process."

The same spirit pervades Project Y.E.S., where students also do community service work and tackle projects that integrate all the basic subjects.

In a project on transportation, for example, students utilized lessons in math and science to design, build and sail their own boats. In history, they studied how transportation had evolved over the years. And in reading, their book assignment was "Around the World in 80 Days." Students also wrote essays about transportation, and those whose

transportation concerns," Miliziano said. "It would be ideal if parents could bring their kids to school.

"It costs \$900 a year to transport one

child," he said. "Maybe we could have a special bus" that would be paid for by the state.

Without state funding, "I don't see where in the heck the district would get the money," he said. ■

42. The Tampa Tribune

05/03/97; Edition: METRO; Section: POLK; Page 1

Poor schools celebrate wealth of inspiration

By BETH FOUSHEE
of The Tampa Tribune

SUMMARY: Fifteen schools participated Friday in the county's first Title I Best Practices Celebration, where teachers traded their ideas.

WINTER HAVEN - Teachers facing some of the biggest hurdles to education - large numbers of pupils coming from poor families or families who move around a lot - had their day of accolades Friday.

It was the first Title I Best Practices Celebration, a time to honor some of the best teaching and family involvement practices in Title I schools.

The Title I designation comes from the federal government, which provides schools with a high percentage of economically poor students additional money to help overcome real-life obstacles.

"We just want to make the teachers feel appreciated," said Gretchen Hallett, the district's family-involvement specialist. "They're doing such good work. Title I schools have always been on the cutting edge of effective practices. I think, because they have to be and because we really study the research."

The county decided to begin the celebration so teachers and administrators could share some of the more-effective strategies with other schools, Hallett said.

Fifteen of Polk's 30 Title I schools participated in the celebration, displaying items from some of their "Best Practices" for teachers, administrators and community members.

Hallett said she hopes the other half of the Title I schools that didn't participate will do so next year. She's guessing the

involvement wasn't great because this is the first year of the program and because it is happening at the end of the school year, when teachers and students are cramming to get their work done.

Here are some of the "Best Practices" shared by area Title I schools:

Purcell Elementary in Mulberry opened a bookstore called "The Page Turner" this year, with books valued at \$15 selling for \$1.50. By year's end, an average of three books per student had been sold. The school has 590 students.

The school also had gift certificates and a layaway plan to give students a mini-math lesson on money and time. Located in the basement of the gym, The Page Turner welcomes parents, grandparents and other community members, teachers said.

The school had a "Scary stories in the Dark" special event in which students read at night in a darkened portable classroom. Next year, they hope to bring in authors.

Combee Elementary in Lakeland had a Family Fun Night each Monday evening, inviting parents and students for special activities and to enjoy the school's computer lab and Media Center. They rewarded attendance with books and cassettes to encourage reading at home.

The school's Monday nights were filled with activities such as favorite-author night; math activities using attribute blocks, pattern blocks and geoboards; and making journals and discussions on home journal writing.

Wahneta Elementary has a unique practice called "Time Out For Parents."

It's a monthly meeting for parents that began in February 1991. Parents meet

from 8:30 to 11:30 a.m. on the second Wednesday of each month, getting acquainted with one other and the school, learning parenting skills and making crafts.

Guest speakers were brought in for some of the meetings, including a deputy to talk about gangs; a chef to provide kitchen hints and a nurse to talk about health concerns and immunizations.

Videos also were shown at some of the meetings and covered such topics as "How to Have Responsible Children," "Help Your Child Learn," and "Reading with Your Child."

Crystal Lake Elementary had a Celebrate Writing Night showcasing the writings of their students for parents to see. The family resource teacher also worked with parents and teachers in planning and organizing parent workshops to train parents in understanding writing strategies and how to help their children at home.

Davenport Elementary has a program called PETALS, or Parents Exploring Teaching and Learning Styles.

Thirty staff members were trained and the remainder will be trained this summer on how to identify students' preferred learning styles. The teachers also are being taught about classroom activities and home activities that support the different learning styles.

The school also has parent workshops to teach parents about learning styles, as well as how to determine the learning styles of family members.

After students have established self confidence, they're encouraged to "walk in" other learning styles to become well-rounded learners. ■

43. Houston Chronicle

05/04/97; Edition: 2 STAR; Section: A; Page 1

CHARTING A NEW COURSE: Young, idealistic

writings were judged the best were taken on a field trip to the airport.

One student, sixth-grader Eric Espinoza, even researched how types of wood affect the speed of boats. He built two boats, one out of plywood and the other out of balsam. Using a rubber-band motor to race them, he concluded that light wood produces faster boats.

Students, too, spend time volunteering in their neighborhood by painting buildings streaked with graffiti and picking up trash.

They even published a bilingual booklet entitled "Kids Guide to Health." Working with medical professionals at the school's health clinic, the students provided parents with information about common childhood diseases. They also campaigned to encourage neighborhood parents to immunize their children.

"For me, the whole community aspect is really important because it makes them more civic-minded overall," said Kavaney, who graduated from Earlham College with a degree in biology. "They see themselves more as a member of the community, a working member of the community."

Barbic, who graduated from

Vanderbilt University with a degree in human development and English, had taught for one year in a large traditional middle school and one year at Rusk Elementary before joining forces with parents to request the middle school.

Barbic, like Garrett, saw too many of his good students go on to middle school and either lose ground academically or drop out. He decided something had to change or he was getting out of teaching. He opted for change.

"No one told us we couldn't do this," said Barbic, "and when your hands aren't tied, you are free to think and imagine things a lot more."

Later this month, the school board is expected to consider yet another proposal from two Milby High School teachers who want to open a small high school on the east side. The school, with an integrated curriculum and an emphasis on projects, would attract students in the Austin High School zone - including those from Project Y.E.S. and Project Chrysalis.

Stephen Simmons, 34, who started teaching science four years ago through the Teach for America program, said a

group of four teachers at Milby has already had great success with the concept, which, among other things, has students building alternative fuel vehicles and electric cars.

"We find that the students want to complete projects," said Simmons. "They want to have something they can point to and say, 'This is ours. We did it. We are proud of this.'"

Teachers like Simmons, Barbic, Garrett and the others are hoping that they too can point with pride to their successes, which will be measured in future years by the number of students they inspire to go on to college and get a degree.

For now, they are doing what they can to get them there.

"We came in on a mission of reform," said KIPP's Feinberg. "We came in already thinking if there is a better way, we need to try to find it. At the same time, we didn't come in thinking the entire system stinks, that we need to start from scratch. There are some amazing programs going on, and some amazing teachers doing those programs." ■

44. Sun-Sentinel Ft. Lauderdale

05/04/97; Edition: FINAL; Section: LOCAL; Page 1B

THE COST OF CONFLICT IN SCHOOLS; STRUGGLES BETWEEN BOARDS, SUPERINTENDENTS CAN BE LONG AND BITTER

BY BILL HIRSCHMAN

Education Writer

Staff Writers Ledyard King and Sarah Talalay contributed to this report.

To 17-year-old Nickell Hundersmarck, education is what happens in her Flanagan High School classroom, not 12 miles away at the Broward County School Board headquarters.

So, when the high school junior heard about the board's plan for a Tuesday vote of confidence on Schools Superintendent Frank Petruzielo, she had a simple question:

"I wonder if this is going to have an impact on me or is it just people arguing over power?" The answer isn't as clear as the question.

Petruzielo runs the nation's

fifth-largest school district, with 217,000 students and 21,000 employees. His job is to set policy and administrate within broad directives set by the board - not to drive a bus or teach a class. Even if Petruzielo loses the board's confidence, the buses will still run and teachers will still show up for class.

But if the superintendent is pushed out or left limping and ineffective by controversy, the ability to address the school district's ills - to move it ahead - would be lost.

It's impossible to predict how Broward school officials will settle their dispute. Board members Darla Carter, Lois Wexler and Miriam Oliphant say Petruzielo ignores them and wants only a rubber-stamp board, but they don't make up a majority of the board.

Petruzielo could keep the backing of a majority of the seven board members, and the controversy might melt away.

"You can rock on for a long time with a 4-3 (board split) as long as you have a solid four," said Douglas Crawford, executive director of the Florida Association of School Administrators. "On a lot of these boards, it's not uncommon at all to have only four votes on lots of issues."

Still, it's never easy to soothe feelings after such a nasty, public dispute.

"If you have a lot of animosity and awkward feelings at the top, it's going to put everyone in a stressful situation," said Poco French, president of the Broward County Council of PTAs. "It's going to eventually trickle down to the kids."

Hal Seamon, deputy executive director of the National School Board Association, said dissension between the top administrator and the board eventually damages a school system.

"Take the example of what we see when the Congress and president are squabbling. You see gridlock," Seamon said.

That's what happened last winter in Duval County, where a strong-minded superintendent much like Petruzielo battled with the School Board for more than a year. The dissension slowed efforts to improve the quality of classroom education and undermined teacher morale, said Billy Parker, a Duval County School Board member.

"When you don't know who's in charge, the wheels don't turn as well," Parker said.

There is fallout even if a superintendent survives a no-confidence vote.

"It's calculated public humiliation on the part of a board member," said Gail Bjork, a former Palm Beach School Board member. "It puts a chill in the district."

Bjork said her district suffered two years of dissension when board sentiment turned against Superintendent Monica Uhlhorn.

"If the superintendent doesn't have the confidence of the board members, then they're essentially ineffective," said Bjork, who supported Uhlhorn in the dispute. "Employees are really scared. It

really cripples a district."

Uhlhorn eventually was paid to leave before the end of her contract.

Such rocky relations between school leaders are increasingly common in the 1990s as officials with stagnant budgets strain to meet growing demands for better test scores and social services.

Superintendents in urban school districts last an average of three years - exactly Petruzielo's tenure, said Gary Marx, executive director of the American Association of School Administrators.

Florida, in particular, is hard on school administrators. State law makes the School Board ultimately responsible for education. However, it grants superintendents almost total independence to hire and organize their troops, Crawford said.

That means board members are increasingly dependent on the superintendent's staff to brief them on complex issues. In Broward, the staff has initiated or drafted nearly every policy proposal - and the three dissident school board members say they're kept out of the loop until it's time to vote on the plan.

Often, when a school board becomes disenchanted with a superintendent, the administrator is allowed to serve to the end of a contract. But it's become common to force them out ahead of time at great cost. That's especially true in Florida, where boards don't have the power to force out a superintendent before the end of an employment

contract.

Usually, the superintendent cuts a deal, leaving early to clear the decks for someone the board can work with. In Duval County, for example, former Superintendent Larry Zenke agreed to leave 30 months before his contract was to expire. In return, he got 42 months pay. Zenke also continued to work for the district as a consultant on desegregation matters, reducing the district's cost.

While buying out a superintendent's contract is expensive, it often is worth it, some observers say.

Rather than pinching pennies, it's often more important to control fighting that "takes away the attention of thoughtful educators from what is really important, which is the education of our children," Marx said.

But there is one other popular view: Strife is an uncomfortable but necessary product of democratic government. In fact, some dissension can help prevent bad policies from being enacted.

Rick Nelson, president of the teachers' union in Fairfax County, Va., watched one of the nation's most strife-torn districts dismiss its longtime superintendent.

"The founding fathers left us with a contact sport, but it's a system that works," Nelson said. "It is part and parcel of change, and we need change."

Staff Writers Ledyard King and Sarah Talalay contributed to this report. ■

45. Orlando Sentinel

05/04/97; Edition: CENTRAL FLORIDA; Section: LAKE SENTINEL; Page 4

MODERN SCHOOL STUDY TOOLS LAG; OFFICIALS SAID MOST CLASSROOM COMPUTERS ARE OUTDATED AND INTERNET CONNECTIONS ARE TOO FEW.

By Dave Weber of The Sentinel Staff

Umatilla High School has been building its collection of computers for years and now has 103 units to serve its 670 students.

That sounds like plenty of computer time for everyone.

But computers go stale quickly. Clear out the junk and only 19 units - fewer than one in five of the computers at

Umatilla High - are anywhere near up to date. Only 486 and Pentium model computers meet current classroom needs, officials said.

"These kids feel the computers are so old that they are being left out," said School Board member Mary Fletcher, who toured the school last week.

The story is the same in schools across the county, where the total number of

computers misleads about the number actually of use, officials said.

Classrooms and laboratories, where students are expected to learn the latest computer skills, are littered with the archaic 286 model and older computers. In an age when even 386s are stones around the neck of Internet surfers, 486 and Pentium units are in short supply in the schools.



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A tax-exempt public policy institute

April 21, 1997

Dear Journalist:

Who's winning the battle over school choice? In 1996, those who favor school choice gained ground:

- * More than 200 charter schools opened in 17 states, and six more states plus the District of Columbia enacted charter-school laws;
- * Important long-term studies of students participating in the Milwaukee school-choice plan showed tangible academic improvement;
- * A court decision in Ohio upheld the constitutionality of a Cleveland program that allowed inner-city children to attend private and religious schools;
- * And in poll after poll, Americans -- especially low-income minority parents -- overwhelmingly favored school choice.

In the paper enclosed, Heritage Foundation Education Policy Analyst Nina Shokraii and Research Assistant Dorothy Hanks give the 1996 wrap-up of what happened across America in the nationwide effort to give parents an alternative to failed or failing public schools.

I hope you find the paper timely and useful as you cover education issues.

Sincerely,

Sam Walker
Director of Editorial Services

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SHOKRAII NAMED EDUCATION POLICY ANALYST AT THE HERITAGE FOUNDATION

WASHINGTON, APRIL 9, 1997 -- Nina H. Shokraii has been appointed education policy analyst at The Heritage Foundation, a prominent public policy research institute.

Shokraii will examine whether federal education programs and policies are effective in educating children and will analyze reform initiatives on Capitol Hill and in the states -- such as "charter schools" and "school choice" voucher programs -- designed to improve schools.

Shokraii is a former director of outreach programs at the Institute for Justice, where she organized a network of public policy experts, attorneys and others to promote school choice and other social issues. A former staff assistant to Rep. Porter Goss, R-Fla., she also served as a policy analyst at Americans for Tax Reform, where she drafted and promoted school-choice legislation for state legislators.

Shokraii earned a bachelor's degree in psychology at Virginia Tech and a master's degree in international studies from George Mason University. She resides in Alexandria, Va.

#

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F.Y.I.

No. 138
April 21, 1997

SCHOOL CHOICE PROGRAMS: WHAT'S HAPPENING IN THE STATES

Nina H. Shokraii
Education Policy Analyst

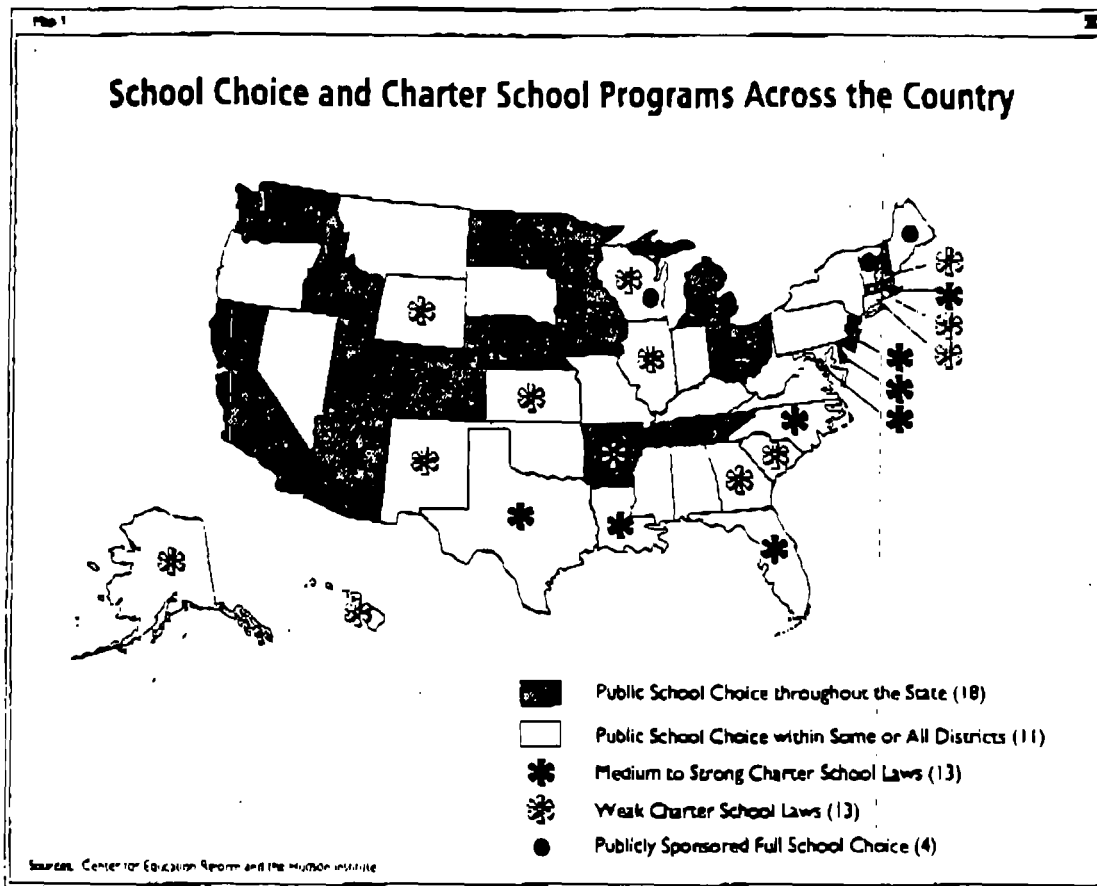
Dorothy Hanks
Research Assistant

INTRODUCTION

For parents and advocates of education reform, 1996 proved to be a watershed year. Many states took action to give parents opportunities to assert greater control over the education of their children. Local school boards adopted initiatives to give parents educational choice and the ability to use vouchers to help pay tuition costs at the schools of their choice. Over 200 new charter schools opened in 17 states, and 6 additional states as well as the District of Columbia enacted charter school laws. Important long-term studies of students who participated in the Milwaukee school choice plan were released that documented and applauded the students' tangible academic improvements. And a court decision in Ohio upheld the constitutionality of a Cleveland scholarship program that allowed inner-city children to attend private and religious schools using public funds. The good news about school choice even included its spreading popularity in state houses and on the pages of local newspapers. Forty-three of the country's governors supported some type of choice in education in 1996.

This growing support for school choice is, in many ways, the result of growing dissatisfaction with public school education. A survey reported in *The Washington Post* in September 1996 shows that Americans consider the deterioration of public schools to be the country's most pressing problem. A surprising 62 percent of those surveyed felt that "The American educational system will get worse instead of better."¹ Their fears are not unfounded. According to the U.S. Department of Education, the U.S. government spent \$301.9 billion on education at the federal, state, and local levels in 1996 alone.² A study released by the Department of Education in November 1996³ compared the

- 1 Mario A. Brossard and Richard Morin, "American Voters Focus on Worries Close to Home," *The Washington Post*, September 15, 1996, p. A1.
- 2 *Budget Bulletin No. 6*, Amy Call, ed., Majority Staff, Committee on the Budget, U.S. Senate, 105th Cong., 1st Sess., March 3, 1997.
- 3 U.S. Department of Education, *Pursuing Excellence: A Study of U.S. Eighth-Grade Mathematics and Science Teaching, Learning, Curriculum, and Achievement in International Context*, National Center for Education



math and science test scores of American eighth graders with those of eighth graders in 40 other countries. American public school students placed only in the bottom half in math and in the middle in science. According to the Department of Education, "The math scores of our very best U.S. eighth graders, who perform at the 95th percentile for our nation, are not significantly different than the scores of average eighth graders in Singapore, who perform at their nation's 75th percentile." Only 13 percent of U.S. students scored in the top 10 percent in science, while only a dismal 5 percent scored in the top 10 percent in mathematics.

Faced with these deplorable statistics and the surging demands of parents for increased accountability, higher standards, and more parental involvement in education, lawmakers are turning to the only education reform initiatives that offer immediate and measurable results for the money invested: school choice and charter schools. The bandwagon to better education is gaining momentum and making its way across the country.

THE POPULARITY OF SCHOOL CHOICE

Recent polls conducted throughout the United States reveal strong parental support for choice in the types of schools their children can attend—especially in areas that serve large, low-income minority populations. One such poll, conducted in April 1996 by the Joint Center for Political and Economic Studies, a think tank in Washington, D.C., found that 61 percent of African-American parents and 64 percent of 18- to 25-year-olds favor school choice.⁴ These percentages soared in cities that have school choice programs already in place. In Milwaukee, for example, 95 percent of African-Americans support school choice.⁵

⁴ Statistics NCES 97-98 (Washington, D.C.: U.S. Government Printing Office, 1996).

⁵ Rochelle L. Stanfield, "A New Survey Fuels Voucher Debate," *National Journal*, April 27, 1996, p. 938.

Charter School Initiatives

Charter schools—run by teachers and parents around a well-defined curriculum—are capturing the attention of local communities and state legislatures. In 1996:

- Education reformers opened 215 charter schools in 17 states, bringing the total number across the country to 480.
- Connecticut, the District of Columbia, Florida, Illinois, New Jersey, North Carolina, and South Carolina successfully enacted charter school laws in 1996, bringing the total number of states with charter schools to 25.
- In Alaska, Delaware, the District of Columbia, Florida, Illinois, Louisiana, and Texas, charter schools opened their doors for the first time in 1996.
- Legislation to create charter schools or initiate some form of school choice programming was proposed in 16 states since 1995.

A July 1996 report by the Indianapolis-based Hudson Institute⁶ found high levels of satisfaction with charter schools among students and their parents, who boasted of the charter schools' clear academic expectations, safety level, amount of individualized instruction, committed teachers, and familial atmosphere.

Voucher Programs

Advocates of publicly funded voucher programs lauded the results of two 1996 studies on the Milwaukee school choice plan. The first, conducted by Jay P. Greene of the Center for Public Policy at the University of Houston and Paul E. Peterson of Harvard University's John F. Kennedy School of Government,⁷ demonstrated for the first time that students participating in the Milwaukee school choice experiment made major academic strides compared with a control group in Milwaukee's public schools. After three years, the gap between the test scores of whites and minorities narrowed by 33 percent to 50 percent. The second study, conducted by Cecilia E. Rouse of Princeton University,⁸ found that the Milwaukee school choice experiment significantly increased the mathematical achievement of students who had participated in the program. All three researchers concluded their studies by calling for more school choice experiments in order to measure a larger sample of students.

Advocates of parochial schooling have reason to rejoice as well. An article by Sol Stern⁹ chronicling the academic benefits of Catholic schooling for inner-city students appeared in the Summer 1996 issue of New York's *City Journal* and garnered widespread attention. The public spotlight also fell on studies by University of Chicago economist Derek Neal¹⁰ and City University of New

5 Wisconsin Policy Research Institute Report, *Expanded School Choice in Milwaukee*, Vol. 8 (1995).

6 Chester E. Finn, Jr., Bruno V. Manno, and Louann A. Bierlein, *Charter Schools in Action: What Have We Learned?* (Washington, D.C.: The Hudson Institute, 1996).

7 Jay P. Greene and Paul E. Petersen, "The Effectiveness of School Choice in Milwaukee: A Secondary Analysis of Data from the Program's Evaluation," presented at the Panel on the Political Analysis of Urban School Systems, American Political Science Association, San Francisco, CA, August–September 1996.

8 Cecilia E. Rouse, "Private School Vouchers and Student Achievement: An Evaluation of the Milwaukee Parental Choice Program," *Executive Summary*, Princeton University Labor Lunch and the National Bureau of Economic Research's Program on Children Conference, December 1996.

9 Sol Stern, "The Invisible Miracle of Catholic Schools," *The City Journal*, Summer 1996, pp. 14–26.

10 Derek Neal, "The Effect of Catholic Secondary Schooling on Educational Attainment," *Working Paper No. 5353*, Department of Economics and the National Bureau of Economic Research, University of Chicago, November 1995.

York's Seymour Lachman and Barry Kosmin, which reconfirm past findings on the benefits of religious schooling.¹¹ These studies found that Catholic schooling dramatically increased the probability of high school and college graduation—achievements that translate into future wage gains for the student. Specifically:

- Neal's study found that the probability that inner-city students would graduate from high school increased from 62 percent to at least 88 percent when those students were placed in a Catholic secondary school.
- Lachman and Kosmin found that nearly 77 percent of black students in Catholic high schools graduated from college.

Tuition at parochial schools is often only half that of the cost to educate one student in an inner-city public school. According to a study on the costs of private school education conducted by the Washington-based Cato Institute¹² and released in March 1996, 67 percent of all private elementary and secondary schools charge \$2,500 or less in tuition, while the average tuition in private schools is only \$3,116—less than half the national average cost to educate a student in public school (\$6,857).

In 1996, Cardinal John J. O'Connor of New York City offered to place the city's "lowest performing" 5 percent of public school students in Catholic schools in the city at no charge. His offer directly challenged the education establishment's argument that private and parochial schools succeed because they only admit the best and brightest students. The Board of Regents torpedoed a similar proposal, championed by Regent Carlos Carballada, that would allow children in 87 failing schools in New York to choose to attend a better school. Further developments on this front look positive for 1997.

New private-sector scholarship programs also flourished in 1997, bringing the total number of programs to 31. As of August 1996, 27 of these autonomous programs had raised over \$30 million and were serving more than 10,000 children around the country.¹³ Most recently, a bill passed by the Arizona legislature and signed by Governor Fife Symington on April 7, 1997, will allow Arizona residents to claim up to a \$500 income tax credit for donations they make to private-sector scholarship programs.¹⁴ This victory for proponents of school choice initiatives sets the stage for many other states to develop similar programs. Many children will benefit by the surge in the number of private sector scholarships that will be available through these programs.

CHALLENGES TO SCHOOL CHOICE INITIATIVES

Courtroom challenges to the constitutionality of school choice brought choice advocates a phenomenal victory and a sour setback in 1996. In Ohio, state court judge Lisa Sadler upheld the constitutionality of the Cleveland scholarship program, opening the way for nearly 2,000 youngsters to attend private and religious schools with public funds. A decision was pending in the Ohio Court of Appeals as of April 1997. In Wisconsin, however, circuit court judge Paul Higginbotham struck down the expansion of the Milwaukee school choice program on a variety of state constitutional grounds. As of April 1997, that case was still pending before the Wisconsin Court of Appeals. And

11 Robin T. Edwards. "Religion Survey holds surprises: Catholic blacks graduate, big churches boom." *National Catholic Reporter*, Vol. 30, No. 8 (December 17, 1993), p. 3.

12 David Boaz and R. Morris Barrett. "What Would a School Voucher Buy?" Cato Institute *Briefing Paper* No. 25, March 26, 1996.

13 Tamara Henry. "Private sector helps needy kids go to private school." *USA Today*, August 28, 1996.

14 Carol Innerst. "Scholarship donors can get \$5(X) tax credit in Arizona." *The Washington Times*, April 8, 1997, p. A9. See also Editorial, "Choice Wins in Arizona." *The Wall Street Journal*, April 7, 1997.

in August, the town of Chittenden, Vermont, challenged the state's policy prohibiting towns from placing students in parochial schools at taxpayer expense. The case, filed by the town at the request of parents, is pending in trial court.

1996 also will be remembered as the year the teachers unions and their congressional allies defeated a small school choice plan for the neediest children in Washington, D.C. Franklin Smith, the city's then-Superintendent of Education, Mayor Marion Barry, and numerous parents fed up with the District's failing school system joined in supporting a plan that offered much hope for the future of the District's children. The plan—attached to Congress's District of Columbia appropriations bill—successfully cleared the House but was ultimately killed in the Senate. The House is likely to resurrect a similar plan during the 105th Congress.

THE BRIGHT OUTLOOK FOR CHOICE IN 1997

All in all, over 43 governors supported some type of choice in education in 1996. Governors Arne Carlson of Minnesota, Tom Ridge of Pennsylvania, and George Voinovich of Ohio are leading the way in the growing state support for school choice programs in 1997. Governor Froilan Tenorio of the U.S. Commonwealth of the Northern Mariana Islands is likely to approve a plan in 1997. Legislatures in Colorado, Florida, Iowa, Maryland, New Jersey, New York, Texas, and Utah will be taking on the education special interest groups by considering various initiatives that are targeted at offering more educational opportunities to students.

Congress also will engage in efforts to enact legislation promoting school choice in 1997. In the House, Representatives J. C. Watts (R-OK) and James Talent (R-MO) introduced H.R. 1031, improving upon legislation they had offered last year aimed at providing vouchers to the country's low-income students. The leading sponsors of school choice in the Senate, Spencer Abraham (R-MI) and Joseph Lieberman (D-CT), have introduced almost identical legislation in S. 432. Senator Paul Coverdell (R-GA) also introduced legislation (S.1) to assist children who attend dangerous schools with educational scholarships.

CONCLUSION

To choice advocates around the country, 1996 is likely to be remembered as the year that paved the terrain for a flurry of victories in 1997 and beyond. As in previous years, state and local governments and the private sector are leading the way in devising, lobbying for, and implementing the country's most cutting-edge educational reforms. As the number of school choice, private scholarship, and charter school programs multiplies around the country, the anti-school choice movement is finding it increasingly difficult to fight against reforms that empower parents more than bureaucrats. For these reasons, 1997 promises to be an interesting and productive year for education initiatives.

For further information and updated information on school choice initiatives in each state, visit The Heritage Foundation's School Choice Web site at: www.heritage.org/heritage/schools. The author may be contacted by calling (202) 546-4400 or by sending an e-mail message to shokraine@heritage.org or hanksd@heritage.org.

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Jonathan_Schnur @ ed.gov
05/01/97 11:55:00 AM

Record Type: Record

To: William kincaid

cc:

Subject: WA Charter Bill Dies as '97 Leg Adjourns

Memo to Charter School Enthusiasts

CC: Fawn Spady (campaign co-chair);
Carrie Shaw (communications director);
Kathryn Reagh (grassroots coordinator)

Fm: Jim Spady

Dt: Monday, 4/28/97; 1:00 pm (But not sent until Thursday 5/1/97 due to problems with accessing American Online)

Dear Friends,

Although Democratic Governor Locke and the Republican-controlled House and Senate passed a budget that included \$5,000,000 for charter schools, and although a charter school bill passed the House for the third year in a row, charter schools were unable to get to the Senate floor (for the third year in a row), and the charter school bill died when the 1997 Washington Legislature adjourned yesterday.

On 4/4/97, the state House passed a moderate charter school bill (HB-2019). The bill passed by a vote of 67-28, with 75% of Republican members and 60% of Democratic members voting yes. Governor Locke supported the bill and promised to sign it.

The bill then went to the Senate, which Republicans control by a 26-23 margin. However, because the House bill required that all charter schools meet state academic standards, it was opposed by a handful of very conservative GOP Senators who believe that the state standards are part of a "Goals 2000" conspiracy. Unfortunately, one of these Senators was the chair of the Senate Education Committee.

However, another charter school bill (SB-7901) had already passed out of the Senate Education Committee and was in Ways & Means. Senator Jim West, the chair of Ways & Means, was willing to use a striker to delete the language in SB-7901 in its entirety, replace it with HB-2019, and then send it to the Senate floor for a vote.

Unfortunately, 3 of the 12 GOP members on the Senate Ways & Means opposed HB-2019 AND NOT ONE DEMOCRATIC SENATOR WAS WILLING TO SUPPORT THIS MODEST, BI-PARTISAN, CHARTER SCHOOL BILL UNLESS THEY GOT A LOT MORE MONEY FOR THEIR

FAVORITE K-12 PROGRAMS IN THE BUDGET.

Because 9 GOP Senators would have voted for the charter school bill, we only needed 2 Democratic Senators to join them to get the bill out of Ways & Means and probably only 2-3 Democratic Senators to pass the bill on the floor of the Senate.

The GOP leadership initially refused to make any compromises early in the budget negotiations. However, they did compromise on Saturday and give Gov. Locke enough extra money for other K-12 education programs (\$45 million) to earn his approval for all of the key sections of the budget, allowing the legislature to adjourn for the year without holding a special session.

Unfortunately, \$45 million in additional K-12 funding was not enough extra money for the Governor to persuade two Senate Democrats to join with Republicans and get the charter school bill out of the Senate.

In short, although the Governor and the Republican leadership were able to negotiate a final deal on the state's two-year, 20 billion dollar budget, the charter school bill was NOT included as part of the final agreement.

What's next?

Washington's 1998 Legislature will convene in January for a 60 day session. Until then, we plan to work with key lawmakers, especially Senators, to see if an agreement can be reached, in advance, on a bill that can win the support of at least 4 Senators in the Senate Education Committee, 11 Senators in the Senate Ways & Means Committee and 25 Senators on the Senate floor, without losing the support of the Governor and a majority of the 98 members of the state House of Representatives.

If these negotiations are not fruitful, charter school supporters should consider filing another ballot initiative which, if successful, would give the charter school bill priority over all other bills in the 1998 legislature. If the 1998 Legislature gave its consent, the ballot initiative would become law immediately, without requiring a vote of the People. If not, the People would get a second chance to vote on a charter school proposal as part of the November 1998 general election. To successfully gather enough signatures to qualify a statewide ballot initiative, we would need to begin gathering signatures no later than October, 1997.

If anyone has any comments or suggestions on possible strategies for bringing charter schools to Washington state, please let me know.

Thank you for everything YOU have done to support charter schools in YOUR community. Although we have not yet been able to pass a charter school law in Washington state, the success of charter schools in other states gives Fawn and I the inspiration we need to carry on until victory is achieved, no matter how long it takes. The movement for charter schools is a small but important part of the ongoing human struggle for individual liberty, a struggle which includes such important causes as the abolition of slavery and women's suffrage.

Those struggles for freedom were also long and difficult, but ultimately successful. We must not rest until we too overcome the obstacles before us and enact charter school laws that bring the benefits of superior public schools to all of America's children. These schools will be driven to excellence and continual quality improvement, not by bureaucratic edicts, but by by the vibrant energy of parent involvement and choice acting in concert with teacher entrepreneurship and creativity.

That is a formula for success for public schools in the 21st century. And that is why the struggle for freedom in public education shall, ultimately, succeed.

The Commonwealth of Massachusetts
The Joint Committee on Education, Arts & Humanities
State House, Room 473G, Boston, MA 02133
Ph. # (617) 722-2070 Fax # (617) 722-2817

Chaw Schools
State Development

FAX COVER SHEET

TO: Meredith ElliotF: 202-456-5581FR: Dwight Robison617/722-2070No. Pages (Including Cover Sheet) 29

Comments: _____

SENATE

NO. 1849

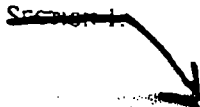
[REPRINT OF SENATE, NO.
1835, AS AMENDED]

[Senate, June 30, 1997 - Passed to be enngrossed
by the Senate as amended and changed by the
committee on Bills in the Third Reading.]

AN ACT Relative to Charter Schools

*Be it enacted by the Senate and House of Representatives in General Court assembled,
and by the authority of the same, as follows:*

~~Section 1.~~



most recently amended by Act No. 223 to 225, inclusive, of Chapter 151 of the acts of 1996,

SECTION ² 7. Chapter 71 of the General Laws is hereby amended by striking out section 89, as appearing in the 1994 Official Edition, and inserting in place thereof the following section:-

(a)
Section 89. A commonwealth charter school shall be a public school, operated under a charter granted by the board of education, which operates independently of any school committee and is managed by a board of trustees. The board of trustees of a commonwealth charter school, upon receiving a charter from the board of education, shall be deemed to be public agents authorized by the commonwealth to supervise and control the charter school.

(b) A Horace Mann charter school shall be a public school or part of a public school operated under a charter approved by the local school committee in which the school is located and by the local collective bargaining agent; provided, however, that all charters shall be granted by the board of education. Horace Mann charter schools shall be operated and managed by a board of trustees independent of the school committees which approve said schools.

(c) For the purposes of this chapter, the words "charter school" or "charter schools" shall refer to both commonwealth charter schools and Horace Mann charter schools unless specifically stated otherwise.

(d) The purposes for establishing charter schools are: (1) to stimulate the development of innovative programs within public education; (2) to provide opportunities for innovative learning and assessments; (3) to provide parents and students with greater

options in choosing schools within and outside their school districts; (4) to provide teachers with a vehicle for establishing schools with alternative, innovative methods of educational instruction and school structure and management; (5) to encourage performance-based educational programs; (6) to hold teachers and school administrators accountable for students' educational outcomes; and (7) to provide models for replication in other public schools.

(e) Persons or entities eligible to submit an application to establish a charter school shall include, but not be limited to a non-profit business or corporate entity, two or more certified teachers, or ten or more parents; provided, however, that no for profit business or corporate entity shall be eligible to apply for a charter. Said application may be filed in conjunction with a college, university, museum or any such persons or entities with reference to a Horace Mann charter school. Private and parochial schools shall not be eligible for charter school status.

(f) The board of education shall establish the information needed in an application for the approval of a charter school; provided, however, that said application shall include but not be limited to a description of: (1) the method for admission to a charter school, (2) the mission, purpose, innovation and specialized focus of the proposed charter school; (3) procedures for teacher evaluation and professional development for teachers and administrators; (4) the school governance and bylaws; (5) the financial plan for the operation of the school; (6) the educational program, instructional methodology and services to be offered to students; (7) the number and qualifications of teachers and administrators to be employed; (8) the organization of the school in terms of ages of

statement of equal educational opportunity which shall state that charter schools shall be open to all students, on a space available basis, and shall not discriminate on the basis of race, color, national origin, creed, sex, ethnicity, sexual orientation, mental or physical disability, age, ancestry, athletic performance, special need, or proficiency in the English language, and academic achievement.

students or grades to be taught along with an estimate of the total enrollment of the school; and (9) the provision of school facilities and pupil transportation. In the case of a Horace Mann charter school, the application shall include a statement of the non-instructional services which will continue to be provided by the local school district.

There shall be no application fee for admission to a charter school.

(g) An application submitted for the establishment of a commonwealth charter school shall: (1) be submitted to the board of education for approval pursuant to this section; and (2) be filed with the local school committee for the school district in which the charter school is to be located. ^{Before} ~~Prior to~~ final approval to establish a commonwealth charter school the board of education shall ~~also~~ ^(application) hold a public hearing on said ~~application~~ ^{application} and ~~to~~ solicit and review comments on the application from the local school committee for the school district in which said charter school is to be located.

(h) Applications to establish a charter school shall be submitted to the board each year by November ¹⁵ ~~fifteenth~~. The board shall review the applications and grant new charters in February of the following year.

(i) The board of education shall make the final determination on granting charter school status and may condition charters on the applicant's taking certain actions or maintaining certain conditions. No more than ⁵⁰ ~~fifty~~ charter schools shall be allowed to operate in the commonwealth at any time. In any fiscal year, no public school district's total charter school tuition payment to commonwealth charter schools shall exceed 6 percent of said district's net school spending. Of the total number of charter schools in the state, 13 shall be reserved for Horace Mann charter schools and ³⁷ ~~thirty-seven~~ shall be

reserved for commonwealth charter schools; provided, however, that in the event that fewer than 13 proposals for Horace Mann schools are submitted to the board of education within three years of the effective date of this act, ^{not more than} ~~up to~~ five charter school slots for said Horace Mann charter schools shall be made available for commonwealth charter schools. Under no circumstances shall the total number of students attending commonwealth charter schools exceed ² ~~two~~ percent of the total number of students attending public schools in the commonwealth. In approving new charters in any year, the board may give priority to proposals for schools located in ~~low performing~~ districts or schools based upon, but not limited to, such indicators as scores on state wide assessments, ~~college board scores~~ and drop out rates. The board may also give priority to schools that have demonstrated broad community support, an innovative educational plan, and a demonstrated commitment to assisting the district in which it is located in bringing about educational change.

underperforming

(g) A charter school established under a charter granted by the board shall be a body politic and corporate with all powers necessary or desirable for carrying out its charter program, including, but not limited to, the following:-

¹
(a) to adopt a name and corporate seal; provided, however, that any name selected must include the words "charter school";

²
(b) to sue and be sued, but only to same extent and upon the same conditions that a town can be sued;

³
(c) to acquire real property, from public or private sources, by lease, lease with an option to purchase, or by gift, for use as a school facility; however, in the case of a

Horace Mann charter school, the approval of the local school committee shall be obtained ^{before} ~~prior to~~ acquisition of any such real property owned or controlled by such body.

4
(d) to receive and disburse funds for school purposes;

5
(e) to make contracts and leases for the procurement of services, equipment and supplies; provided, however, that if the charter school intends to procure substantially all educational services under contract with another person, the terms of such a contract must be approved by the commissioner either as part of the original charter or by way of an amendment thereto; provided, further that the commissioner shall not approve any such contract terms, the purpose or effect of which is to avoid the prohibition of this section against charter school status for private and parochial schools;

6
(f) to incur temporary debt in anticipation of receipt of funds; provided that a Horace Mann school shall obtain the approval of the local school committee and appropriate local appropriating authorities and officials relative to any proposed lien or encumbrance upon public school property or relative to any financial obligation for which the local school district shall become legally obligated; and provided further that notwithstanding any law to the contrary, the terms of repayment of any charter school's debt shall not exceed the duration of the school's charter without the approval of the commissioner.

7
(g) to solicit and accept any grants or gifts for school purposes

8
(h) to have such other powers available to a business corporation formed under

156B
chapter ~~one hundred and fifty-six B~~ that are not inconsistent with this chapter.

(k) Charter schools shall not charge any public school for the use or replication of any part of their curriculum subject to the prescriptions of any contract between the charter schools and any third party providers.

(l) Charter schools shall be open to all students, on a space available basis, and shall not discriminate on the basis of race, color, national origin, creed, sex ethnicity, sexual orientation, mental or physical disability, age, ancestry, athletic performance, special need, or proficiency in the English language, and academic achievement. Charter schools may limit enrollment to specific grade levels and may structure curriculum around particular areas of focus such as mathematics, science, or the arts.

(m) Preference for enrollment in a commonwealth charter school shall be given to students who reside in the city or town in which the charter school is located. Priority for enrollment in a Horace Mann charter school shall be given first to students actually enrolled in said school on the date that the application is filed with the Board of Education and to their siblings; second to other students actually enrolled in the public schools of the district where the Horace Mann charter school is to be located and third, to other resident students.

(n) If the total number of students who are eligible to attend and apply to a charter school and who reside in the city or town in which the charter school is located, or are siblings of students already attending said charter school is greater than the number of spaces available, then an admissions lottery, including all eligible students applying, shall be held to fill all of the spaces in that school from among said students. If there are more spaces available than eligible applicants from the city or town in which said charter

school is located and who are siblings of current students, and more eligible applicants than spaces left available, then a lottery shall be held to determine which of said applicants shall be admitted; provided, however, that any lottery conducted for Horace Mann charter schools shall reflect the enrollment priorities of this section.

Notwithstanding the provisions of this ^{subsection} ~~paragraph~~, upon application by the board of trustees of a charter school or by the persons or entities seeking to establish a charter school, the board of education may amend or grant a charter designating such school a regional charter school; provided, however, that such regional charter school shall be exempt from the local preference provision of this paragraph; provided, further, that such regional charter school shall continue to grant a preference of siblings of currently enrolled students; and provided, further, that if the number of applicants remaining is greater than the number of spaces available, such regional charter school shall conduct a single lottery to determine which applicants shall be admitted. There shall be no tuition charge for students attending charter schools.

(c) Each charter school shall annually, no later than April 15, notify each public school district in writing of the number of students who will be attending the charter school from that district the following September as well as the number of new students who will be transferring from that district to the charter school in the following September. In 1997 charter schools shall provide the required enrollment information no later than August, ~~1st~~. Tuition for charter school students shall only be paid for the number of students for whom notification has been reported by April 15. Tuition for charter school students shall be paid only for students actually enrolled in said school.

(p) A student may withdraw from a charter school at any time and enroll in another public school where said student resides. A student may be expelled from a charter school based on criteria determined by the board of trustees, and approved by the board of education, with the advice of the principal and teachers, provided, however, that charter school policies shall be consistent with sections 37H and 37H 1/2 of this chapter.

(q) A charter school may be located in part of an existing public school building, in space provided on a private work site, in a public building, or any other suitable location.

A charter school may own, lease or rent its space.

(r) The school committee of each district where a Horace Mann charter school is located shall develop a plan to disseminate innovative practices of said charter school to other public schools within the district subject to the ^{provisions} ~~prescriptions~~ of any contract between the Horace Mann charter school and any third party provider.

(s) The commissioner shall facilitate the dissemination of successful innovation programs of charter schools and provide technical assistance for other school districts to replicate such programs.

(t) A charter school shall operate in accordance with its charter and the provisions of law regulating other public schools; provided, however, that the provisions of sections ⁴¹ ~~forty~~ one and ⁴² ~~forty~~ two shall not apply to employees of commonwealth charter schools. Charter schools shall comply with the provisions of chapters ^{71A} ~~seventy one~~ A and ^{71B} ~~seventy one~~ B; provided, however, that the fiscal responsibility of any special needs student currently enrolled in or determined to require a private day or residential school shall remain with the school district where the student resides. If a charter school expects that

Nothing in the foregoing shall be construed to preclude computer, cable, or other technology-based learning in conjunction with, or in place of, classroom based learning.

a special needs student currently enrolled in the charter school may be in need of the services of a private day or residential school, it shall convene an individual education plan (IEP) team meeting for said student. Notice of the team meeting shall be provided to the special education department of the school district in which the child resides at least five days in advance. Personnel from the school district in which the child resides shall be allowed to participate in the team meeting concerning future placement of the child.

(u) Horace Mann charter schools shall be exempt from local collective bargaining to the extent ~~as prescribed~~ ^{provided} by the terms of its charter; provided, however, that employees of the Horace Mann charter school shall continue to be members of the local collective bargaining unit and shall accrue seniority and shall receive, at a minimum, the salary and benefits established in the contract of the local collective bargaining unit where said Horace Mann charter school is located. Employees of Horace Mann charter schools shall be exempt from all union and school committee work rules ~~pursuant to~~ ^{to the extent provided by} said school's charter. Employees in Horace Mann charter schools shall be required to work the full ~~work day~~ ^{and} ~~work year as prescribed~~ ^{provided} by the terms of the individual charter school proposal.

(v) Notwithstanding the provisions of this section or any other general or special law to the contrary, for the purposes of chapter 268A a charter school shall be deemed to be a state agency and the appointing official of a member of the board of trustees of a charter school shall be deemed to be the commissioner of education. The members of the board of trustees of all charter schools operating under the provisions of this section shall file a statement of financial interest with the state ethics commission, pursuant to section ~~five~~ ⁵ of chapter 268B.

(u) Students in charter schools shall be required to meet the same performance standards, testing and portfolio requirements set by the board of education for students in other public schools.

(x) The board of trustees, in consultation with the teachers, shall determine the school's curriculum and develop the school's annual budget. The board of trustees of each Horace Mann charter school shall annually submit to the superintendent and school committee of the district in which such school is located a budget request for the following fiscal year. The school committee shall act on such budget request in conjunction with its actions on the district's overall budget. The school committee shall not reduce such budget request if in doing so, the school would receive proportionately less funding than other comparable schools in the district. The board of trustees may appeal any such disproportionate reductions to the commissioner, who shall determine an equitable funding level for such school and shall require the school committee to provide such funding.

(y) Following the appropriation of the district's operating budget for the fiscal year, the amount approved by the school committee for the operation of each Horace Mann charter school shall be available for expenditure by the board of trustees of such school for any lawful purpose without further approval by the superintendent or the school committee. In no case shall a Horace Mann charter school expend or incur obligations in excess of its budget request; provided, however, that a Horace Mann charter school shall be authorized to spend federal and state grants and other funds received independent of

the school district not accounted for in said charter school's budget request without prior approval from the superintendent or the school committee.

(2) Upon approval of a Horace Mann charter school by the board of education, the superintendent of the school district where the Horace Mann charter school is to be located shall reassign, to the extent provided by the terms of its charter ~~when feasible~~, any faculty member who wishes to be reassigned to another school located within said district.

(aa) Employees of charter schools shall be considered public employees for purposes of tort liability under chapter ~~two hundred and fifty-eight~~ ²⁵⁸ and for collective bargaining purposes under chapter ~~one hundred and fifty-E~~ ^{150E}. The board of trustees shall be considered the public employer for purposes of tort liability under said chapter ~~two hundred and fifty-eight~~ ²⁵⁸ and for collective bargaining purposes under said chapter ~~one hundred and fifty-E~~ ^{150E}. Teachers employed by a charter school shall be subject to the state teacher retirement system under Chapter ~~thirty-two~~ ³² and service in a charter school shall be "creditable service" within the meaning thereof.

(bb) Each local school district shall be required to grant a leave of absence to any teacher in the public schools system requesting such leave in order to teach in a commonwealth charter school. A teacher may request a leave of absence for up to two years.

(cc) At the end of the second year the teacher may either return to his former teaching position or, if he chooses to continue teaching at said commonwealth charter school, resign from his school district position.

; provided, however, that in the case of a Horace Mann charter school, the school committee of the school district in which the Horace Mann charter school is located shall remain the employer for collective bargaining purposes under said chapter 150E.

59C

(dd) Notwithstanding section ~~fifty-nine~~ ^{59C} E, the internal form of governance of a charter school shall be determined by the school's charter.

(ee) A charter school shall comply with all applicable state and federal health and safety laws and regulations.

(ff) The children who reside in the school district in which the charter school is located shall be provided transportation to the charter school by the resident district's school committee on the same terms and conditions as transportation is provided to children attending local district schools. In providing such transportation, said school committee shall accommodate the particular school day and school year of the charter school; provided, however, that in the event that a school committee limits transportation for district school students, the school district shall not be required to provide transportation to any commonwealth charter school beyond said limitations. In no case shall charter schools receive funds for transportation above the amount actually required by the charter school pursuant to this section. If the sending district provides an alternative method of transportation for students enrolled in the sending district's public schools, it shall not be assessed for transportation costs which exceed the per pupil cost of said alternative. Costs for transportation shall be included only if transportation is provided for students in the same program and grade level as those in the charter school.

Students who do not reside in the district in which the charter school is located shall be eligible for transportation in accordance with section ~~twelve~~ ^{12B} B of chapter ~~seventy-six~~ ⁷⁶ six.

(gg) Each charter school shall submit to the board of education, to the local school committee, to each parent or guardian of its enrolled students, and to each parent or

guardian contemplating enrollment in that charter school an annual report. The annual report shall be issued no later than August ¹first of each year for the preceding school year.

The annual report shall be in such form as may be prescribed by the board and shall include at least the following components:

(a) discussion of progress made toward the achievement of the goals set forth in the charter; and (b) a financial statement setting forth by appropriate categories, the revenue and expenditures for the year just ended.

(hh) Each charter school shall keep an accurate account of all its activities and all its receipts and expenditures and shall annually cause an independent audit to be made of its accounts. Such audit shall be filed annually on or before January 1 with the department of education and the state auditor and shall be in a form prescribed by said auditor. Said auditor may investigate the budget and finances of charter schools and their financial dealings, transactions and relationships, and shall have the power to examine the records of charter schools and to prescribe methods of accounting and the rendering of periodic reports.

(ii) If a charter school student previously attended a private or parochial school or was home schooled, the commonwealth shall assume the first year cost for that student and shall not reduce the sending district's chapter 70 aid for that student's tuition in that fiscal year.

(jj) Individuals or groups may complain to a charter school's board of trustees concerning any claimed violations of the provisions of this section by the school. If, after

presenting their complaint to the trustees, the individuals or groups believe their complaint has not been adequately addressed, they may submit their complaint to the board of education which shall investigate such complaint and make a formal response.

(k/e) A charter granted by the board of education shall be for five years. The board may revoke a school's charter if the school has not fulfilled any conditions imposed by the board in connection with the grant of the charter or the school has violated any provision of its charter. The board may place the charter school on a probationary status to allow the implementation of a remedial plan after which, if said plan is unsuccessful, the charter may be summarily revoked.

(p/l) The board of education shall develop procedures and guidelines for revocation and renewal of a school's charter; provided, however, that a charter for a Horace Mann charter school shall not be renewed by the board without a vote of support from the school committee and local collective bargaining agent in the district where said charter school is located.

(m/m) any other provision of this section
Notwithstanding the foregoing, no school building assistance funds, so-called, shall be awarded to a commonwealth charter school for the purpose of constructing, reconstructing or improving said school.

(n/n) Commonwealth charter schools shall be funded as follows: if a student attending a charter school resides in a district with a positive foundation gap, as defined in section 2 of chapter 70, the commonwealth shall pay a tuition amount to the charter school equal to the average cost per student in said district. If the student resides in a district that does not have a positive foundation gap, as so defined, the commonwealth

shall pay a tuition amount to the charter school equal to the lesser of: (1) the average cost per student in said district; and (2) the average cost per student in the district in which the charter school is located. The state treasurer is hereby authorized and directed to deduct said charter school tuition amount from the total education aid, as defined in said chapter ⁷⁰~~seventy~~, of the district in which the student resides prior to the distribution of said aid. In the case of a child residing in a municipality which belongs to a regional school district, the charter school tuition amount shall be deducted from said chapter ⁷⁰~~seventy~~ education aid of the school district appropriate to the grade level of the child. If, in a single district, the total of all such deductions exceeds the total of said education aid, this excess amount shall be deducted from other aid appropriated to the city or town. If, in a single district, the total of all such deductions exceeds the total state aid appropriated, the commonwealth shall appropriate this excess amount; provided, however, that if said district has exempted itself from the provisions of chapter ⁷⁰~~seventy~~ by accepting section ¹⁴~~fourteen~~ of said chapter ⁷⁰~~seventy~~, the commonwealth shall assess said district for said excess amount. The state treasurer is hereby further authorized to disburse to the charter school an amount equal to each student's charter school tuition amount as defined above.

INSERT
PAGE 15.1

(cc) Beginning in fiscal year 1999, any district whose total charter school tuition amount is greater than its total charter school tuition amount for the previous year shall be reimbursed by the Commonwealth in accordance with this paragraph and subject to appropriation; provided, however, that no funds for said reimbursements shall be deducted from funds distributed pursuant to chapter 70 ~~of the general laws~~. The reimbursement amount shall be equal to 100% ^{per cent} of the increase in the year in which the

The board

of education shall adopt regulations for determining the average cost per student in calculating charter school tuition amounts for the purpose of this ~~subsection~~ ^{paragraph}, and in adopting said regulations shall consult with the executive office for administration and finance and shall consider the actual cost per student, the variation in cost for different grade levels and different programs, a charter school's capital costs, the advisability of establishing a maximum amount for such average cost, and the impact on existing charter schools, other public schools in the district, and new charter schools.'

15.1

not on

increase occurs; 60% ^{per cent} of that amount in the first year following; and 40% ^{per cent} of that amount in the second year following.

3.
SECTION ~~2~~ For the purposes of evaluating charter schools established under section 89 of chapter 71 of the General Laws, the education reform review commission established pursuant to section 79 of chapter 71 of the ~~Acts~~ of 1993 shall conduct an independent evaluation of charter schools. For purposes of this evaluation only, said commission shall also include as additional members, a parent of a student enrolled in a charter school and a charter school leader or teacher. Said evaluation shall be reported to the joint committee on education, arts and humanities, along with proposed recommendations and drafts of legislation necessary to carry its recommendations into effect, not later than December 31, 1999.

~~SECTION 3~~ ^{R(pp)} The commissioner of education shall collect data on the racial, ethnic and socio-economic make-up of the student enrollment of each charter school in the commonwealth. The commissioner shall also collect data on the number of students enrolled in each charter school who have individual education plans pursuant to ^{this} chapter ~~71~~ and those requiring transitional bilingual program services. Said data shall be filed annually with the clerks of the house and senate and with the joint committee on education, arts and humanities ^{not} ~~no~~ later than December 1.

SECTION 4. No charter school proposal given conditional approval by the board of education prior to the effective date of this act shall be given priority status by the board of education when granting new charter schools pursuant to this act.

SECTION ^{1.} ~~A~~ Said chapter 69 of the general laws is hereby ~~further~~ amended by inserting after section 1L the following ~~new~~ section:-

Section 1M. The board shall establish a discretionary grant program for the purpose of providing planning grants to assist in the development and establishment of charter schools pursuant to section 89 of chapter 71 ~~of the general laws~~.

SECTION ^{5.} ~~A~~ Reimbursements made pursuant to section 19 of chapter 267 of the acts of 1995, as amended by section 525 of chapter 151 of the acts of 1996, shall be limited to tuition charges for charter schools which began operation ^{before} ~~prior to~~ July 1, 1998. Said reimbursement shall be based on the tuition charge for said school in fiscal year 1998 or the tuition charge for said school in the year in which reimbursement is being made, whichever is less.

SECTION ⁶ ~~7~~: Notwithstanding any provision or law to the contrary, ~~any public school~~

district that transfers ^{percent} 5% or more of its net school spending to commonwealth charter

schools in ^{fiscal year} ~~1997~~ shall not in any future fiscal year have more than an additional ^{percent} 3% of

said district's net school spending transferred to commonwealth charter schools for

charter school tuition payments.

7.

SECTION ~~7~~: The board of education shall, after a public hearing, adopt the regulations for determining the average cost per student in calculating charter school tuition amounts, as required by ~~subsection (aa) of~~ ^{section} section 89 of chapter 71 of the General Laws, ~~as appearing in this act,~~ ^{inserted by section 1 of chapter 123 of the Acts of 1997} not later than October 1, 1997. Said regulations shall take effect for the school year beginning in September 1998.

8

SECTION . The department of education is hereby authorized and directed to study the advisability of legislation authorizing local school committees to grant charters to existing public schools, to be known as district charter schools. Said study shall also consider ^{the effect of such legislation on federal funding and} whether schools now designated as pilot schools by the Boston school committee should be designated as such district charter schools. The department shall report the results of said study, together with proposed legislation if any, to the joint committee on education, arts and humanities, not later than November 1, 1997.

in sect. 2

Mr. Lane of Holden moves that Senate 1835 be amended in SECTION 1 by striking in lines 38 to 41 the second sentence and inserting in place thereof the following:-

Said application may be filed in conjunction with a college, university, museum or other similar non-profit entity.

and that the bill be further amended in SECTION 1, in the ninth paragraph, in line 95, by striking the word "underperforming" and inserting in place thereof the following:- "low performing".

and that the bill be further amended in SECTION 1 in sub paragraph (e) on page 6 by striking the word "commissioner" as appearing in line 121 and 123 and inserting in place thereof the word "board".

and that the bill be hereby further amended in SECTION 1 by striking the word "commissioner" in line 136 and inserting in place thereof the word "board".

and that the bill be further amended in SECTION 1 by striking the sentence beginning on line 167, "Nothing in the foregoing shall be construed to preclude computer, cable, or other technology-based learning in conjunction with, or in place of, classroom based learning." and inserting in place thereof the following sentence:-

Nothing in the foregoing shall be construed to preclude computer, cable, or other technology-based learning in conjunction with classroom based learning."

and that the bill be hereby further amended in SECTION 1 by striking in line 279 the words "school committee" and inserting in place thereof the words "local appropriating authority".

and that the bill be amended in Section 3 by striking the second sentence and inserting in place thereof the following:-

The commissioner shall also collect data on the number of students enrolled in each charter school who have individual education plans pursuant to chapter 71B and those requiring transitional bilingual education services."

and that the bill be further amended in SECTION 4 by striking the word "board" in line 2 and inserting in place thereof the word "secretary".

2/ A (2)

Mrs. Paulsen of Belmont moves that the bill, S-1835, be amended in section 1, line 149, by inserting after the words "proficiency in the English language" the words "or a foreign language"

11/ ⑦ A

7/21/97

Mr. Sullivan of Braintree moves to amend the bill (Senate 1835) by inserting the following new section:

SECTION 9 That a full evaluation of the costs associated with the establishment of charter schools shall be conducted by a commission consisting of the House and Senate Chairmen of the Joint Committee on Education or their designees, Arts and Humanities; the Chair of the House Ways and Means Committee or his designee; the Chair of the Senate Ways and Means Committee or his designee; the Secretary of the Executive Office of Administration and Finance, or his designee; the Commissioner of Education or his designee; and a member of the Massachusetts Teachers Association. Said study shall include but not be limited to, whether or not those responsible for the administration or those choosing to enroll in charter schools shall make a contribution towards the operation of said charter school, the cost of transportation and necessary school supplies. Said study shall be completed on or before December 31, 1997.

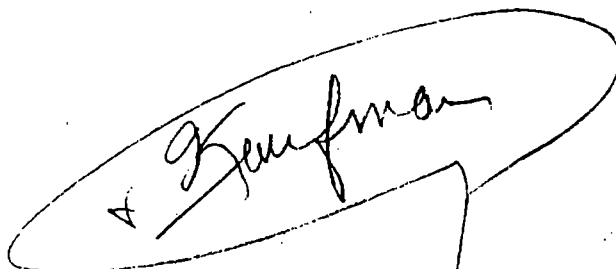
Ed. R. Sullivan

17
10 A
Rep O'Brien of Hanover ~~amendments~~ moves that the bill be ammended at the end thereof:

SECTION 8. The inspector general shall conduct a study of the operation, practices and activities at the established charter schools in the commonwealth. Said study shall include, but not be limited to an analysis and evaluation of contracting practices and any and all related matters and whether any procedures, practices, programs or measures may be employed or implemented to ensure that the charter schools are in conformance with state laws governing contracting, related-party transactions, record keeping and the expenditure of public funds. The inspector general shall submit the findings and recommendations of said study to the house and senate committees on ways and means and the joint committee on education, arts and humanities on or before December 31, 1997.

SECTION 9. Notwithstanding the provisions of section 27C of chapter 29 of the general laws or any provisions of any special or general law to the contrary the administrators of charter schools in the commonwealth who are the procurement officers for said schools shall participate in the Massachusetts public purchasing official certification program conducted by the office of the inspector general in order to earn a Massachusetts public purchasing official certificate.

(11) A



Mr. Petersen of Marblehead moves that the bill be hereby amended in Section 7 by adding at the beginning thereof the following :-

"The Board of Education is hereby authorized and directed to conduct an evaluation of charter school tuition payments and compare said tuition payments with the actual costs of educating students in charter schools and the actual costs of educating said students in their respective public schools. Said evaluation shall be filed with the clerks of the senate and the house of representatives, the senate and house committees on ways and means, and the joint committee on education, arts, and the humanities no later than September 30, 1997."

18/ 11 A

Mr. Kaufman of Lexington moves that S1835 be amended by adding at the end of Section 2 the following:

^{also}
Said evaluation shall include, but not be limited to the following matters: an evaluation of the fiscal effects of charter school financing on municipal and regional public school districts; ~~an evaluation of whether charter school expenditures are reasonably comparable to the cost of educating students in public school systems;~~ an evaluation of whether and to what extent the innovative practice of the charter schools can be replicated in public school systems; and a study how and how effectively charter schools stimulate or diminish innovative practice in public school systems.

(m) Horace Mann, ^{in sect 5} of Boston (13) A

Rep. Lane, of Holden moves that Senate 1849 be amended (X)

(H) "Each Horace Mann charter school will receive in the budget request not less than it would have under the district's budgetary allocation rules." The board of trustees may appeal any disproportionate budgetary allocation to the commissioner, who shall determine an equitable funding level for such school + shall require the school committee to provide such funding."

(*) in paragraph (X) by striking the fourth ^{and fifth} sentences and inserting in place thereof the following: -

(14)

A

Remember to do in ship

(14)

Mr. Petersen moves that the bill
be amended by adding the following
new section:

⁵²⁵
Section 525 of Chap. 151 of the
Acts of 1996 is hereby amended
by striking the word "thirty" and
inserting in place thereof the
following: "forty".

THE PRESIDENT HAS SEEN
7-15-97

Chas School

School-choice proposals mount along with public's unhappiness

By Carol Innerst
THE WASHINGTON TIMES

Despite legal setbacks for voucher programs in Milwaukee, Cleveland and Vermont, dissatisfaction with public schools continues to stoke fires for school choice.

"The growing support for school choice is, in many ways, the result of growing dissatisfaction with public school education," said Nina H. Shokrall, education policy analyst for the Heritage Foundation, a conservative think tank.

"Over 43 governors supported some type of public or private choice in education in 1996, and Congress is finally connecting with the grass-roots movement around the country that's been calling for school choice."

Minnesota just increased its state tax deduction for public or private education purposes and instituted a new tax credit that can be used for a variety of educational purposes including private tutoring, textbooks and transportation — but may not be used for private school tuition.

Arizona recently passed a tax credit for citizens who want to contribute to a private scholarship fund.

Proposals at the federal level include a budget amendment offered by Sen. Paul Coverdale, Georgia Republican, that would allow a \$500-per-child tax credit to be used for tuition to private schools, and a D.C. school-choice plan offered by House Majority Leader Richard K. Armey of Texas that garnered the support of Rep. Floyd H. Flake, a liberal black Democrat from New York, Miss Shokrall said.

When the Joint Center for Political and Economic Studies in June released an annual poll on blacks' views of various social issues, it

"Congress is finally connecting with the grass-roots movement."

showed that support for school choice among blacks aged 26 to 35 was at 86.5 percent. That was up from 60.9 percent last year, Miss Shokrall said.

"I don't think there's majority support for vouchers yet. . . . That's still up in the air. . . . but blacks are shifting toward vouchers," said John J. Jennings, director of the Center on Education Policy, an independent national advocate for public education and improved schools.

"You have an unusual coalition in favor of vouchers that includes conservatives who are free market people and inner-city blacks, and of course the Catholics and other religious school people," said Mr. Jennings, legal counsel to the House Education and Labor Committee when the Democrats controlled the House.

"They're all coming from different perspectives, and we've already seen the beginnings of how it will play with Polly Williams in Milwaukee. Inner-city blacks are so frustrated with the state of inner-city schools they just want out, and it's pretty hard to blame them."

As he sees it, President Clinton, Education Secretary Richard Riley and others "fighting for public schools" hope that public charter schools free of many government regulations in order to spark creativity will channel the energy that is building for school choice in a different direction than

vouchers.

By fall, there will be about 700 charter schools throughout the country, and Mr. Jennings says they haven't "peaked."

"They bring flexibility to a very rigid structure," he said. "All of our structures must become more flexible, and public schools may be one of the last to reach that point, but if they don't, they won't survive."

Public-opinion polls provide different readings on school choice, but all show growing support — or at least a lessening of opposition — to the idea of government vouchers over the past five years.

A 1996 poll commissioned by the Center for Education Reform, a free market education clearinghouse and advocacy organization, revealed that 70 percent of the public (82 percent of parents with school-age children and 90 percent of blacks) support giving poor parents tax dollars to send their children to a private, public or parochial school.

The 1996 annual Phi Delta Kappa-Gallup poll showed no clear majority on the government voucher question, with parents with children in public schools split evenly, 49 percent to 49 percent, and 2 percent undecided.

Meanwhile, two studies have shown achievement gains by children in both the Milwaukee and Cleveland voucher programs.

"The reason school choice works is that it shifts the locus of power away from the bureaucracy to students and parents — consumers — who will make better decisions than the bureaucrats in Milwaukee or Cleveland," said Richard C. Leonardi, president of the 3-year-old Buckeye Institute, a research and educational public policy organization in Ohio.

The Washington Times

SUNDAY, JULY 6, 1997

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FORESIGHT

Hudson Institute insights on the issues of the day

June 1997
Volume 1
Number 6

Charter Schools

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Federal embrace of charter schools could be fatal

By Gregg Vanourek, Bruno Manno, and Chester Finn Jr.

President Clinton has become a cheerleader for charter schools. Hurrah for that. Most of the dozens of charter schools we've visited are pretty terrific.

But when he calls for doubling federal funds for them (to \$100 million next year) and visualizes 3,000 such schools by the turn of the century (up from 500 today), it's important to know what exactly he means by a charter school: Does the president insist on fully independent public schools that are

free to innovate, to shape their own destinies, and to direct their own resources? Or will he, like his political supporters at the National Education Association and elsewhere in the public school "establishment," favor near-clones of conventional schools that must obey most of the usual rules even while waving the "charter" banner?

When a reform that rocks boats becomes a fad that everyone appears to endorse, one must ask whether it has retained its essence. (Is a cinnamon-raisin bagel—reportedly another Clinton passion—really a bagel, or just a sweet roll with a belly button?) Our travels to almost 50 charter schools in nine states over the past 18 months have led us to distinguish between the genuine article and faux charters that carry the

name but are really just minor variations on the theme of "site based" management. If the fakes, lauded and aided by the false friends of charter schools, spread faster than the real thing, which continues to be bitterly resisted in one state and community after another, we may find that "support" for charter schools could prove lethal to this promising reform strategy. If the White House allows its prestige (and additional federal dollars) to buttress the fakes, Mr. Clinton's seeming enthusiasm for charter schools could actually hasten their death.

As schools with the "charter" label multiply, as more states pass enabling legislation, and as other jurisdictions weigh amendments to existing charter laws, it's worth recalling what this idea is all about.

The basic concept is simple and, we think, powerful: Sound school choices can be provided to families under the umbrella of public education without micromanagement by government bureaucracies. Independent schools that are open to all, paid for with tax dollars, accountable to public authorities for pupil achievement, and subject to basic

health, safety, and nondiscrimination requirements are public schools even if they're managed by a committee of parents, a team of teachers, the local Boys & Girls Club, or perhaps a profit-seeking firm. They need not be regulated into conformity by platoons of assistant superintendents, staffed only by government employees, or bent to the thousand clauses of union contracts.

By now it's clear that not all charter programs are created

equal. Many states have enacted weak, Potemkin-style statutes that display the facade but not the reality of charter legislation, binding charter schools to most of the crippling constraints faced by conventional public schools. For example: Their teachers are deemed to be employees of the local school district, and they must adhere to its collective bargaining contracts. They may hire only certified teachers (not, for example, a NASA scientist or Bill Gates). And they have some say over curriculum but little or no control of their money.

Uncle Sam is at fault, too. Modest federal checks to help meet start-up costs are surely welcome. But the big programs (such as Title I, special education, and school lunch) make no

allowance for the unconventional contours of charter schools—nor has Mr. Clinton said they should. Funding formulae are still tied to school system demographics; the dollars seldom follow eligible youngsters to different schools; and the regulatory burden of participation is heavy for a fledgling school with no bureaucratic superstructure. Nor do even the strongest charter laws provide for the capital-funding needs of charter schools.

Many such constraints are there on purpose, imposed by enemies of charter schools who, unable to strangle this infant reform in its crib, have done their utmost to keep it from growing big and strong. Others, however, are more like bureaucratic accidents. In North Carolina, for example, despite a generally strong law, the attorney general has issued a preliminary ruling stating that charter teachers cannot take advantage of the state retirement system unless their schools surrender their independence and function as part of their local districts. This is a Faustian bargain.

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Reprogramming America's educational DNA

continued from page 1

In Illinois, a number of promising charter proposals have lately been derailed by hostile districts. (One very solid school plan was shunned by 11 separate districts.) In Olympia, Washington, as charter bills traverse the legislative hurdles, committees have diluted them at every turn, forbidding multiple sponsors and sabotaging the appeals process—and thereby revealing as false the promises of business leaders and others who swore last fall that, if only the “referendum” version of charter schools was defeated (which happened), the legislature could be counted upon to pass a strong charter law. In New York, the powerful teachers’ union has made it plain that it has a similar fate in mind for Governor George E. Pataki’s bold charter plan.

Financial and bureaucratic hurdles

In California, where the charter program is already in its third year, few schools have been able to negotiate financial autonomy. As a board member in one such school remarked to us: “I’m damn mad at this creeping takeover of our budget by the district. It all comes down to a matter of control.”

Such political hassles, bureaucratic subservience, and micromanagement are exactly what charter schools are meant to escape. The whole point is to offer freedom from red tape in return for a commitment to produce specific results. To deliver on that commitment, the school must be free to decide who will teach what and how, where to locate and what hours to operate, whether to require uniforms, what homework to assign, how best to impart reading skills to six-year-olds, and which sports (if any) to offer.

It must be able to spend its money on teachers, tutors, counselors, or computers—as its leaders see fit.

In return, the charter school is profoundly accountable—in two directions. Since nobody is forced to attend, it must answer to students and parents via the marketplace. And since the charter-issuing body is not obliged to renew its charter, to remain in existence it must also deliver the promised results, usually defined in academic standards and tracked on statewide (or other) tests. If the charter issuer wants to ensure that the school doesn’t voyage into curricular outer space, it can stipulate core skills and knowledge. Otherwise, those running the school decide what to teach. (The one big exception, of course, is religion.)

Charter foes have devised two strategies: blasting these schools off the landscape and tugging them back into the coils of the bureaucracy. Never mind that charter schools today enroll barely two-tenths of one percent of American schoolchildren. What’s agitating their enemies is the realization that the idea is beginning to catch on—and if the president has his way it will spread even faster. Hence the public school mandarin—the teachers’ unions, to be sure, but also school board and administrator groups—is striving to contain their numbers, limit their freedom, and redefine their concept. Recent examples include Bob Chase, the president of the National Education

Association, and Michael Kelly of *The New Republic*, who used the antics of Washington’s Marcus Garvey Charter School to savage the whole idea.

Meanwhile, most of the charter schools that struggle into existence—through all the bureaucratic hurdles, under all the “caps,” with little or no capital funding, and often with reduced operating dollars—are terrific educational institutions. They’re generally small, safe schools that are clear about their mission, staffed by dedicated teachers, and supported by devoted parents, many of whom supplement the schools’ resources with their own perspiration. We’ve encountered a few that we wouldn’t send our own kids to, but far more often we’ve liked what we’ve seen.

Fenton Avenue secession

Consider California’s Fenton Avenue Charter School, a preschool-through-sixth grade institution that “seceded” from the Los Angeles Unified School District in order to operate independently. Open year round, it offers an education to 1,300 students with a teaching staff of 63. Its enrollment is 75 percent Hispanic, over 97 percent minority, and nearly all poor.

Unlike most California charters, Fenton Avenue has gained control of almost its entire (\$6 million) budget. This autonomy has allowed much that was impossible under district and union thumbs: reducing class size; adding afterschool and Saturday programs; managing the school’s own food services; providing free accident insurance for kids and long-term disability for employees; reducing administrative personnel by 25 percent; and restoring a 10 percent staff pay cut. It has created an on-site broadcasting studio (the first one ever for a California elementary school), developed its own primary phonics instruction program (in both Spanish and English), and boosted pupil test scores more than 20 percent in two years.

The public school establishment hates all this: The cracking of its monopoly, the ironclad accountability for results, the evidence that more can be done with the same (or less) resources, the shift of power to consumers. Yet charter schools are sprouting like mushrooms. California now has more than 100, and Arizona has grown more than 150 since 1995. Small though these numbers are alongside the behemoth of public education, they’re more alarming to the status quo than anything save vouchers. (And they’re spreading much faster.)

Although new and without lengthy track records, most charter schools already have waiting lists. State charter programs are bumping against caps that legislators often impose as a compromise with the teacher’s unions. In Massachusetts, for example, all twenty-five authorized charters have been awarded. Five approved applicants are on a waiting list of their own, and 123 groups have applied since 1994.

Inviting innovation, demanding results

The great appeal of charter schools is that they invite innovation while demanding results—the precise opposite of conventional U.S.

public schools. By doing so, charter schools are reprogramming America’s educational DNA. Public education, as currently constituted, is a species showing signs of extinction. It’s too regimented, lumbering, and inert to survive in a changing environment.

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Backed by the NEA, Clinton unlikely charter school ally

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Charter schools are a mutation—an adaptation to more demanding surroundings—that will help the species survive, albeit transformed. But policymakers beware of the false friends of the charter idea or it won't ultimately do any good.

Charter schools are bona fide "schools of choice," open to all who wish to attend them. Yet despite critics' predictions that they would "cream" the best pupils from conventional schools, we found just the opposite: Charter schools are mainly drawing kids who were having rotten experiences in regular schools (or had dropped out). Fifty-five percent of U.S. charter students in 1995-96 were poor, 63 percent were minority-group members, 19 percent had limited English proficiency, and almost one in five had disabilities. (Early data from the current school year indicated a similar enrollment pattern.)

One might suppose such demographics would mute the opposition. Yet they seem to infuriate the mandarins even more, perhaps because they signal both that disadvantaged kids are truly gypped by the current system and that poor families are savvy enough to do something about it as soon as the exit door is unlocked.

Most opponents simply assert that all education dollars belong by right to the "school system" (that is, not to children, parents, and taxpayers) and that charter schools thus "rob" funds from their proper custodians. Recently, a favorite stratagem employed by foes has been to haul a few bad apples from the charter barrel (Citizen 2000 in Arizona and the Garvey School in Washington are favorite examples) and hold them up for public outrage. The implication is that this innovation must be proven foolproof—and drained of all risk—before it is even seriously tried. Meanwhile, the conventional school system gets away with massive malpractice: mediocre, unsafe schools that are enveloped in all the bureaucratic controls that charter schools lack, yet where little learning happens.

Of course, charters are no cure-all. Five hundred schools aren't many in a land with 83,000 public schools—and it's so hard to start and succeed with one that their numbers may not swell, even with President Clinton's encouragement and a dribble of federal stimulus funding. Nor does the charter label immunize them to human frailties, slipshod planning, unanticipated crises, and reversals of fortune.

The fact that the missteps of a few ne'er-do-well charter schools are being trumpeted poses a harsh dilemma: Putting a tight-enough lid on the charter barrel to keep out every bad apple would destroy the freedom that's vital for the many good ones to succeed. Substituting rule compliance for results accountability would abort this valuable educational experiment.

Will charter schools survive their current assault by false friends and overt foes? That depends on whether policymakers are shrewd enough to identify—and limit—the domains where charter schools are most vulnerable to regulatory overload. Still, it's significant that the fight is no longer about whether to permit charter schools to exist but about how independently they will be able to operate.

What are we to make of President Clinton's enthusiasm? A recent *Economist* article pointed out that his "policy points in the right direction, but it is sadly timid," doubtless due to anxiety about offending key political supporters. If he were truly serious about charter schools, he'd take on the unions that are trying to cripple them and rein in the federal rules that are strangling them. Otherwise, true charter school advocates should be wary of his embrace.

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To obtain, free of charge, the first of seven Final Reports from the Charter Schools in Action Project call 1-800 HUDSON-0 or (317) 545-1000. Final Report, Part 1, available now, is a satisfaction survey, "Charter Schools As Seen by Those Who Know Them Best: Students, Teachers, and Parents." The remaining six will be available at the end of July.

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Reprogramming America's educational DNA

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In Illinois, a number of promising charter proposals have lately been derailed by hostile districts. (One very solid school plan was shunned by 11 separate districts.) In Olympia, Washington, as charter bills traverse the legislative hurdles, committees have diluted them at every turn, forbidding multiple sponsors and sabotaging the appeals process—and thereby revealing as false the promises of business leaders and others who swore last fall that, if only the “referendum” version of charter schools was defeated (which happened), the legislature could be counted upon to pass a strong charter law. In New York, the powerful teachers’ union has made it plain that it has a similar fate in mind for Governor George E. Pataki’s bold charter plan.

Financial and bureaucratic hurdles

In California, where the charter program is already in its third year, few schools have been able to negotiate financial autonomy. As a board member in one such school remarked to us: “I’m damn mad at this creeping takeover of our budget by the district. It all comes down to a matter of control.”

Such political hassles, bureaucratic subservience, and micromanagement are exactly what charter schools are meant to escape. The whole point is to offer freedom from red tape in return for a commitment to produce specific results. To deliver on that commitment, the school must be free to decide who will teach what and how, where to locate and what hours to operate, whether to require uniforms, what homework to assign, how best to impart reading skills to six-year-olds, and which sports (if any) to offer.

It must be able to spend its money on teachers, tutors, counselors, or computers—as its leaders see fit.

In return, the charter school is profoundly accountable—in two directions. Since nobody is forced to attend, it must answer to students and parents via the marketplace. And since the charter-issuing body is not obliged to renew its charter, to remain in existence it must also deliver the promised results, usually defined in academic standards and tracked on statewide (or other) tests. If the charter issuer wants to ensure that the school doesn’t voyage into curricular outer space, it can stipulate core skills and knowledge. Otherwise, those running the school decide what to teach. (The one big exception, of course, is religion.)

Charter foes have devised two strategies: blasting these schools off the landscape and tugging them back into the coils of the bureaucracy. Never mind that charter schools today enroll barely two-tenths of one percent of American schoolchildren. What’s agitating their enemies is the realization that the idea is beginning to catch on—and if the president has his way it will spread even faster. Hence the public school mandarin—the teachers’ unions, to be sure, but also school board and administrator groups—is striving to contain their numbers, limit their freedom, and redefine their concept. Recent examples include Bob Chase, the president of the National Education

Association, and Michael Kelly of *The New Republic*, who used the antics of Washington’s Marcus Garvey Charter School to savage the whole idea.

Meanwhile, most of the charter schools that struggle into existence—through all the bureaucratic hurdles, under all the “caps,” with little or no capital funding, and often with reduced operating dollars—are terrific educational institutions. They’re generally small, safe schools that are clear about their mission, staffed by dedicated teachers, and supported by devoted parents, many of whom supplement the schools’ resources with their own perspiration. We’ve encountered a few that we wouldn’t send our own kids to, but far more often we’ve liked what we’ve seen.

Fenton Avenue secession

Consider California’s Fenton Avenue Charter School, a preschool-through-sixth grade institution that “seceded” from the Los Angeles Unified School District in order to operate independently. Open year round, it offers an education to 1,300 students with a teaching staff of 63. Its enrollment is 75 percent Hispanic, over 97 percent minority, and nearly all poor.

Unlike most California charters, Fenton Avenue has gained control of almost its entire (\$6 million) budget. This autonomy has allowed much that was impossible under district and union thumbs; reducing class size; adding afterschool and Saturday programs; managing the school’s own food services; providing free accident insurance for kids and long-term disability for employees; reducing administrative personnel by 25 percent; and restoring a 10 percent staff pay cut. It has created an on-site broadcasting studio (the first one ever for a California elementary school), developed its own primary phonics instruction program (in both Spanish and English), and boosted pupil test scores more than 20 percent in two years.

The public school establishment hates all this: The cracking of its monopoly, the ironclad accountability for results, the evidence that more can be done with the same (or less) resources, the shift of power to consumers. Yet charter schools are sprouting like mushrooms. California now has more than 100, and Arizona has grown more than 150 since 1995. Small though these numbers are alongside the behemoth of public education, they’re more alarming to the status quo than anything save vouchers. (And they’re spreading much faster.)

Although new and without lengthy track records, most charter schools already have waiting lists. State charter programs are bumping against caps that legislators often impose as a compromise with the teacher’s unions. In Massachusetts, for example, all twenty-five authorized charters have been awarded. Five approved applicants are on a waiting list of their own, and 123 groups have applied since 1994.

Inviting innovation, demanding results

The great appeal of charter schools is that they invite innovation while demanding results—the precise opposite of conventional U.S. public schools. By doing so, charter schools are reprogramming America’s educational DNA. Public education, as currently constituted, is a species showing signs of extinction. It’s too regimented, lumbering, and inert to survive in a changing environment.

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