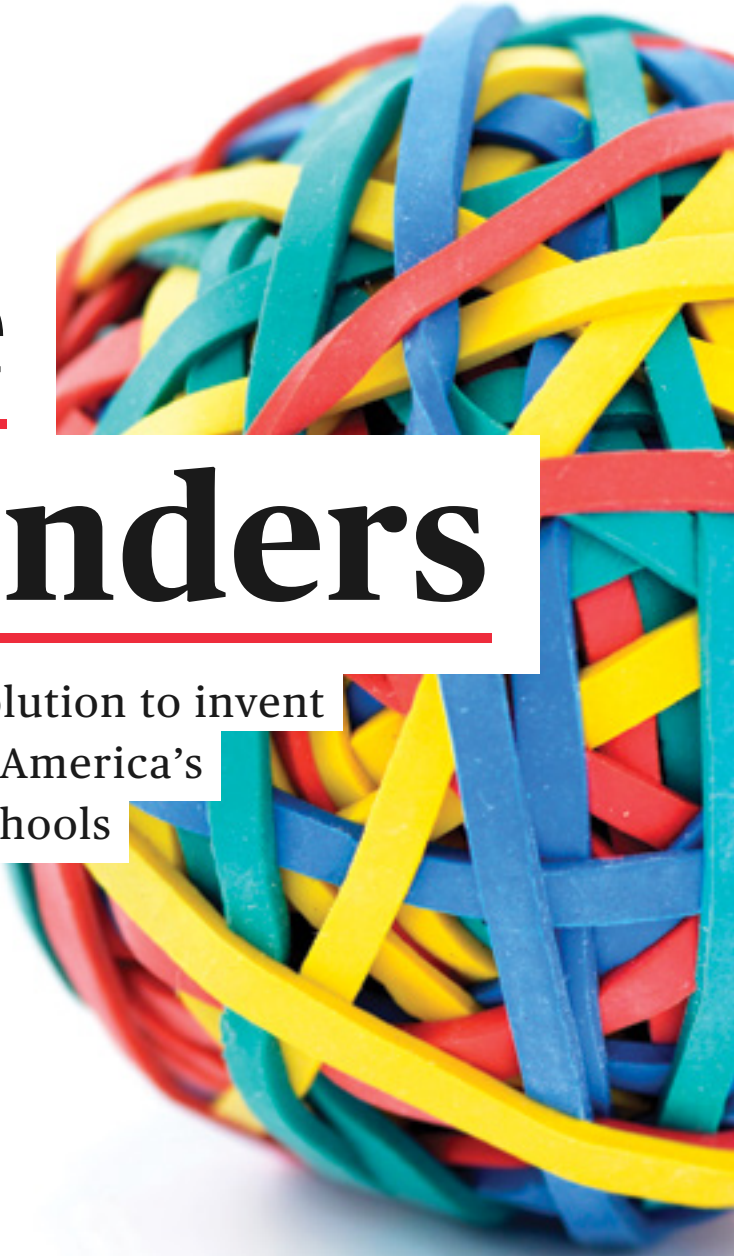
The Founders

Inside the revolution to invent (and reinvent) America's best charter schools



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Foreword

by Arne Duncan

Chicago
2016

In the field of education, success is too often an orphan while failure has many fathers.

The stories of the high-performing charter school networks featured in Richard Whitmire's important new book provide a welcome antidote to the pernicious notion that high-performing schools for disadvantaged students are isolated flukes, dependent on a charismatic educator or the cherry-picking of bright students. Whitmire's account lets us in on the secret of the sauce: What is it that schools can do at scale for children to close achievement gaps, even in the face of the real burdens of poverty?

As CEO of the Chicago Public Schools, and later as the U.S. Secretary of Education, I had the good fortune to visit dozens of gap-closing charter schools, including many of the charter school networks featured in Whitmire's account. I always came away from those visits – as I do when I visit any great public school – with both a sense of hope and a profound feeling of respect and gratitude for the

Arne Duncan reads to students at a Maryland elementary school
— *courtesy of Getty Images*

school's educators and school leaders. These outstanding educators exemplify what we should aspire to in all public schools: Educators who wake up every day determined to make a difference in the life of a child, determined to excite a love of learning, and determined to open a door of opportunity where none existed.

At the same time, it was clear to me on these visits that running a high-performing charter school is anything but simple or for the faint of heart. It takes courage, a caring connection with students, and a tenacious commitment to equity. It takes smarts, and expertise about how children learn. And it takes talent.

I have yet to visit a great school where the school leaders and teachers were content to rest on their laurels. I have never heard a

charter school leader describe their school as a “miracle school” or claim that they have found the silver bullet for ending educational inequity. The truth is that great charter schools are restless institutions, committed to continuous improvement. They are demanding yet caring institutions. And they are filled with a sense of urgency about the challenges that remain in boosting achievement and preparing students to succeed in life.

This year marks the 25th anniversary of the passage of the first state law authorizing charter schools – which came about, in no small measure, thanks to the advocacy of Al Shanker, the legendary labor leader of the American Federation of Teachers. Twenty-five years later, it seems fitting to take stock of the successes and failures of the charter school movement – and to ask what challenges the next 25 years will bring.

In their first quarter-century, charter schools dramatically expanded parental choice and educational options in many cities. What was once a boutique movement of outsiders now includes more than 6,700 charter schools in 43 states, educating nearly 3 million children. But the most impressive accomplishment of the charter school movement is not its rapid growth. What stands out for me is that high-performing charter schools have convincingly demonstrated that low-income children can and do achieve at high levels – and can do so at scale.

Poverty is not destiny

When I was at CPS in Chicago, people used to warn me that we could never fix the schools until we ended poverty. For the record, let me stipulate that I am a huge fan of out-of-school anti-poverty programs. At CPS, we dramatically expanded the number of school-based health clinics, free vision services, and dental care. I was virtually raised in an out-of-school anti-poverty program, my mother's after-school tutoring program on the South Side of Chicago.

Yet I absolutely reject the idea that poverty is destiny in the classroom and the self-defeating belief that schools don't matter much in the face of poverty. Despite challenges at home, despite neighborhood violence, and despite poverty, I know that every child can learn and thrive. It's the responsibility of schools to teach all children – and to have high expectations for every student, rich and poor. I learned that lesson firsthand in my mother's after-school tutoring program – and I saw it in action in my visits to many of the gap-closing charter schools featured in this book. High-performing charters are one more proof positive that, as President Obama says, "the best anti-poverty program around is a world-class education."

Sadly, much of the current debate in Washington, D.C., in education schools, and in the blogosphere about high-performing charter schools is driven by ideology, not by facts on the ground. Far too often, the chief beneficiaries of high-performing charter schools – low-income families and children – are forgotten amid controversies over funding and the hiring of nonunion teachers in charter schools. Too often, the parents and children who are desperately seeking

better schools are an afterthought.

When I was at CPS, we replaced one failing school in the violent, high-poverty Englewood neighborhood with three schools, one of which was Urban Prep Charter Academy, an all-male, all-black school. At Urban Prep's predecessor, Englewood High, a senior was shot to death at a bus stop in front of the school a few years before we closed the school. Just 4 percent of seniors read at grade level – i.e., in every class of 25 students, one student on average could read at grade level. And this educational malpractice had been going on for a long time. Don Stewart, the former president of Spelman College and head of the Chicago Community Trust, told me that his mother wouldn't let him attend Englewood High 50 years earlier because it was known as a terrible school even then.

Graduation day at Urban Prep Charter Academy
— courtesy of Urban Prep Charter Academy

In 2010, four years after Urban Prep Charter Academy opened, it graduated its first class – with all 107 seniors headed off to four-year colleges and universities. Urban Prep Academies recently announced that 100 percent of the 252 seniors in the class of 2016 were admitted to a four-year university or college, too – the seventh year in a row in which 100 percent of Urban Prep seniors were admitted to a four-year college or university.

Despite the bloodless, abstract quality of much of today's debates on charters, the ideologically driven controversies won't end anytime soon. Advocates and activists will continue to care about whether a high-performing school is identified as a charter school or a traditional neighborhood school. But it is worth remembering that children do not care about this distinction. Neither do I. There is nothing inherently good or bad about a charter or any other school. The only thing that matters is if a school is a great school. It doesn't matter to me whether the sign on the door of a school has the word "Charter" in it, and it doesn't matter to children. Nor does it matter to most parents.

Challenges for the next quarter-century

Many of the challenges facing high-performing charter schools in the next 25 years are no secret. Richard Whitmire ably identifies those challenges, as have many pioneering leaders of top-performing

charter management organizations. I want to single out three specific issues.

First, while high-performing charters have a solid record of boosting achievement and attainment among students of color, their record is much less impressive with students with disabilities, English-language learners, and difficult-to-serve populations like adjudicated youth. Black and Hispanic students are overrepresented at high-performing charters. But students with disabilities and ELL students are not.

In the next 25 years, top-performing charters should do more to include and elevate the most difficult students to serve. My hope is that high-performing charters will pioneer ways to better educate students with disabilities, overage students, students in the correctional system, and ELL students. Diversity and cultural competency are particularly critical issues at high-performing charters where most teachers are white and where most students suspended are black or are students with disabilities. The relatively small subset of high-performing charters that overuse out-of-school suspensions and expulsions should be striving to reduce their reliance on exclusionary discipline.

Plenty of top-performing charter schools set high behavioral expectations for students without making heavy use of exclusionary discipline. It's time for all schools, charter or otherwise, to rethink their school discipline and school climate policies if they are suspending a large proportion of their students. Every school should think of itself as a pipeline to college and careers, not as a pipeline to juvenile detention centers and prison.

Second, high-performing charters should be pushing for more accountability in the charter sector. The grand bargain of charters is that in exchange for increased autonomy from school district rules and union contracts, charter school leaders will provide more accountability for taxpayer dollars. The charter sector is doing a better job today of closing down poorly performing charters than in the past. But there are still far too many bad charter schools that continue to be reauthorized, too much financial mismanagement at charter schools, and too many states with weak laws regulating charter authorizers.

A recent study of urban charters in more than 40 cities found that, overall, urban charter students were making substantial gains in math and reading, compared with their traditional public school peers. But the 2015 study, from Stanford University's Center for Research on Education Outcomes (CREDO), also showed that charter school performance varies enormously from city to city.

In Boston, charter students were making huge gains, learning the equivalent of more than two years of math in only one school year and gaining nearly an additional year in reading. By stark contrast, in Las Vegas, charter school students were losing 11 weeks of learning in reading and 16 weeks of math during the school year. That vast gulf in outcomes between Boston and Las Vegas charters is not just coincidence – Nevada, unlike Massachusetts, has had a history of lax regulation of charter schools.

The best charter school operators set high standards for ethics and accountability. But that doesn't exempt them from a responsibility to promote better accountability for charters. Fairly or unfairly,

the bad actors in the charter sector reflect unfavorably on all charters. Learning from the best, and culling out the worst, is a shared responsibility that shouldn't be ignored.

Last but not least, in the next quarter-century, I hope that high-performing charters do more to fulfill their promise as laboratories of innovation. Charters were supposed to be the research-and-development wing of public education – "incubators of innovation," in President Obama's words. But they have yet to truly realize that potential.

With some notable exceptions, top-performing charters haven't developed breakthrough innovations in the areas of personalized learning, technology, and competency-based learning. Nor, for the most part, have high-performing charters been in the vanguard of schools applying findings from the learning sciences to drive better instruction. And finally, top-flight charters have done little to either offer or improve the all-important field of early learning – in part because it is difficult, if not impossible, for charter schools to include early learning grades in states that fail to provide per-pupil funding for pre-K.

A seismic shift in American education

In the end, top-performing charters cannot merely tend to their own garden or stand apart from the need for dramatic

improvements in American education. K-12 education is undergoing seismic change today. All but a handful of states have embraced higher learning standards, pegged for the first time to the expectations of student readiness for college and careers. The new federal law replacing No Child Left Behind pushes more of the responsibility for protecting at-risk children back to the states. Meanwhile, dozens of states are developing new and better ways to evaluate and support teachers that, for the first time, are taking account of a teacher's impact on student learning.

Parents are questioning how much testing is needed to hold schools and educators accountable for providing a world-class education to all students. And for the first time in our nation's history, more than half of public school students are children of color and more than half are from low-income families.

These profound changes in public education are happening while shifts in the job market are making a quality education more important than ever. In a knowledge-based, global economy, critical thinking, creativity, and problem-solving skills are the new currencies for landing a job. Under these rapidly evolving conditions, our schools urgently need new ideas and new technology to meet stiffer educational challenges. They need highly skilled and creative teachers with the ability to couple high expectations and personalized learning.

To fully take advantage of these extraordinary opportunities, I believe that the charter sector will need to undergo a slow but profound shift of mind-set in coming years. Charter school leaders will no longer just be outsiders knocking at the door of the traditional

schools. My hope is that they will become less like combatants in the battles over education and more like co-conspirators for change with traditional public schools.

Thankfully, the shift to collaboration with school districts is already underway at top-performing charters. Witness the partnerships that YES College Prep has formed with the Houston and Aldine school districts, and KIPP's partnerships in Houston. At the Uncommon Schools charter network, three leaders banded together to write *Great Habits, Great Readers*, which helps codify their schools' successful K-4 reading taxonomy in the hope that it can help all elementary schools address the Common Core State Standards. And the Apollo 20 project in Houston has been the most sweeping and successful effort to date to import the practices of high-performing charter schools into district schools. (A similar project is underway in Denver.)

While the leaders of gap-closing charters are starting to push their gap-closing strategies to scale in school districts, some lawmakers and conservative commentators continue to resist the common-sense investments that would elevate our education system – from universal early learning to better teacher preparation. I urge them to read this book, to visit these schools, and to meet with these charter pioneers – talk with their students and evaluate their work.

This book shows that outstanding charter schools have proved there is no mission impossible in public education. By developing great teachers and leaders, working with courage, skill, and unrelenting determination, these gap-closing schools have demonstrated that every single child can learn.

The extraordinary accomplishments of the teachers, school leaders, and students featured here are a great start, but they cannot be the end of the story. I am not satisfied with just talking about top-performing charters as islands of educational excellence. If no man is an island, no school should be either. The question I ask – and that I encourage all educators who read this book to ask – is: Why can't success be the norm?

I look forward to seeing how outstanding charter schools advance education in the next 25 years. But most of all, I look forward to the day when educational islands of excellence become districts and even states of excellence. I believe it's possible. I know it's needed.

Former Secretary of Education Arne Duncan is a managing partner of the Palo Alto based Emerson Collective, working with disconnected youth in Chicago.

Preface

In Search of Teacher Zero

Washington, D.C.
2016

The best question to ask any book writer is:

What did you learn that surprised you? In my case, it took a lunch with Don Shalvey, the founder of California-based Aspire Public Schools, to come up with the answer to that question. Shalvey, who originally suggested this book idea, dipped a spoon into his potato soup and said, "You know, it didn't have to turn out this way."

Immediately, I knew that was the big insight: Yes, it really didn't have to turn out this way. By that, I mean: America's top charter schools were never hardwired to effusively share with one another. And yet it's this sharing that has proved to be so pivotal to their success. It's the explanation for why we now have networks of hundreds of very high-performing charters revealing success stories in neighborhoods where traditional schools have failed kids for generations.

Want to see my charter application? No problem. Want to tour

my school? Let me know when you arrive. Want to see my student culture code? Here it is. Want to adopt our guided reading program? No problem. Interested in the most effective online math programs? Here's what we discovered.

I know what you're thinking: Teachers in traditional districts share all the time, through in-school meetings, professional development sessions, district-wide conferences, annual teachers union conventions and lesson-sharing websites. Teachers live in a sharing-is-us world.

But what was shared among these charter pioneers is very different. These folks weren't just passing along new ways to teach multiplication tables; they were cracking the code about successfully educating low-income, minority students – an unprecedented feat. If this were happening at Apple or the Pentagon, this kind of information would be discussed on a need-to-know basis in rooms impervious to eavesdropping. Instead, these charter entrepreneurs were blabbing their state secrets to anyone willing to visit.

That sharing explains how the top charter schools, roughly the top 20 percent of charters, all of them nonprofits, showed that the impossible – overcoming at least some of the entrenched effects of poverty – is not so impossible. Actually, that's projecting modesty: The best of the best of this group actually level the achievement gap. Skeptical? Review the data behind Boston's Brooke Charter Schools.

But in many ways that sharing is, well, odd. Charter schools compete with one another for students as well as talented teachers, philanthropy and facilities. So why did one top charter group after another turn into sharing machines rather than fierce and protective

competitors?

For the early charter pioneers, sharing was a matter of survival, Shalvey told me. "We were so convinced that the traditional school district was trying to kill us that we banded together like counterrevolutionaries. We needed one another to survive."

But was survival the only reason for this heritage of sharing? The laws of competition suggest that once charters became firmly rooted, the charter leaders would revert to their natural, sharp-elbowed instincts and fight over buildings and talent. Here's a far more interesting way to examine that question: Was there an "original act of sharing" that set an enduring precedent, something powerful enough to persist for two decades?

Impossible to know, right? On one level the question sounds somewhat religious, almost Talmudic. Asking that question evokes those many *New Yorker* cartoons in which truth-seekers climb to the mountain peak to seek wisdom from the peak-top guru – "Was there an original act of sharing?" – only to be told something silly.

At first, I didn't think the question was answerable, but a conversation with Dave Levin, co-founder of the KIPP network of charter schools, changed my mind. To Levin, who in interviews with charter founders is often described as Teacher Zero of the entire movement, the guy who cracked the code on effective teaching and then shared with anyone who asked, the answer lies with one person: Harriet Ball.

For anyone who knows the history of KIPP, especially anyone who has read *Work Hard. Be Nice.*, Ball should be an obvious place to start. She is the Houston teacher who taught KIPP co-founders Levin and Mike Feinberg how to succeed as urban educators. The three

became so close that Ball referred to them as the Three Musketeers. She was the real Teacher Zero.

Ball, who died in 2011, was over six feet tall, with a commanding voice, a legendary teacher at Bastian Elementary who ran the classroom just down the hallway from Levin, who was struggling with his kids. One day he ventured into Ball's classroom and asked to observe. From *Work Hard. Be Nice.*: "She played her students like an orchestra. With her nod, the fourth graders would begin a musical chant, something that sounded like the multiplication tables. With her raised hand, they would snap back into silence."

"She made it clear that we were expected to share everything she shared" ... and that's exactly how it played out.

Lots of classroom observations and weekend get-togethers led Levin and Feinberg to fashion their own Ball-inspired classroom rhythms, which are visible today in almost any high-performing charter school.

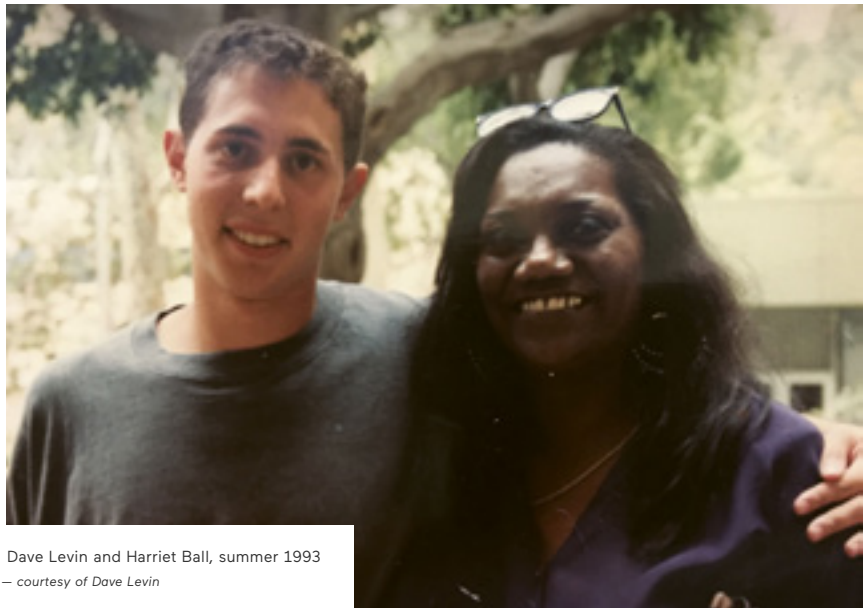
While I was familiar with the Harriet Ball story from reading *Work Hard. Be Nice.*, not until talking to Levin was I aware of the strict guidance Ball passed along to the two. When Levin and Feinberg met Ball, she was 46, a veteran teacher. She had always assumed that one day someone would document what she did and pass it along to others. She just never guessed that someone would be a white Jewish kid from New York City. Sometimes, life just turns out that way.

While Ball was happy to share with her Musketeers, she had

one firm request. “She made it clear that we were expected to share everything she shared,” Levin told me. And that’s exactly how it played out, with Feinberg sharing from his Houston KIPP base and Levin sharing from his New York City KIPP base.

Soon other seminal charter founders – Dacia Toll from what would become Achievement First, Norman Atkins from what would become Uncommon Schools – were stopping in to soak up lessons from Levin in his Bronx school, the very lessons that Levin had soaked up from Ball at Bastian Elementary.

Thus, there truly was an original act of sharing, and it was powerful enough to endure over two decades. “Now,” said Shalvey, “sharing is the kind of value that gets handed down around the



Dave Levin and Harriet Ball, summer 1993
— courtesy of Dave Levin

campfires at the Charter School Growth Fund annual conference."

It didn't have to happen. But it did.

— *Richard Whitmire*

Part One

1

The Early Innovators

Founders at a 2004 NewSchools Venture Fund gathering

— courtesy of NewSchools Venture Fund

Introduction

The President Visits

Silicon Valley
September 21, 1997

San Carlos schools Superintendent Don Shalvey was both relieved and exhausted.

President Bill Clinton had chosen the San Carlos Charter Learning Center, California's first charter school, which Shalvey had launched 10 minutes north of Palo Alto, to announce new federal monies for charter schools. The press conference had just concluded in the school's multipurpose room.

The rush to prepare for the Clintons had been hectic. When the Secret Service demanded a "rope line" (Who keeps a rope line handy?), Shalvey scrambled and finally found one to borrow from a local movie theater. But the event was a big success; Bill had poured on the famous Clinton charm. At that point, Shalvey felt the same as any school leader feels after wrapping up a big event, from a homecoming football game to prom: You're ready to go home, put your feet up, have a glass of California red and thank the Lord for getting through a glitch-free event.

President Bill Clinton visits Don Shalvey's charter school
— *courtesy of Don Shalvey*

Reed Hastings played a key role in the expansion of charter schools in California
— *courtesy of Netflix*

But for Shalvey, this day wasn't over.

A man Shalvey didn't recognize, someone who at the last minute had somehow managed to gain entry onto the tightly controlled White House invite list, came up to Shalvey to introduce himself. Reed Hastings, whose Peace Corps stint in Swaziland made him into a lifelong education advocate, wasn't yet famous as the founder of Netflix.

"Do you think California will ever lift the cap and expand the number of charter schools?" Hastings asked Shalvey, referring to the 100-school cap on new charter school growth. "How about lunch? I think that the two of us might be able to make a difference."

Two weeks later, Shalvey took that lunch at Cafe Borrone in Menlo Park. There, Shalvey learned that Hastings had quietly minted money Silicon Valley style: The company he started, Pure Software, had just sold for $750 million. That gave Hastings time to work on a

plan to overcome the cap.

Shalvey agreed to join in on what had to be considered folly. Their goal: Unleash charter schools in a state where a union that despised charters, the California Teachers Association (CTA), was accurately viewed as the 800-pound gorilla of state politics. Neither Shalvey nor Hastings was anti-union. In fact, Shalvey had always had good relationships with the union. But they knew the CTA was capable of throwing up fierce roadblocks. At the beginning, it all seemed an impossible dream, but through a combination of luck and cunning, Shalvey's and Hastings's campaign succeeded. (I'll tell the full story soon.)

Not only did Hastings and Shalvey win unlimited expansion of charter schools in California, but the law also allowed for the creation of the nation's first charter management organization (or CMO, a nonprofit that manages multiple schools): Aspire Public Schools, which Shalvey led. That, in turn, led to charter entrepreneurs around the country turning to fast-reproducing CMOs, which, in turn, created broader networks of high-performing charters. It was these networks, along with a select group of single-site charters and small-group charters, that today make up roughly the top 20 percent of all charter schools – schools that are upending every known belief about what's possible when it comes to educating poor and minority students. By 2015, these top charters had changed public schooling forever; most were adding a year and a half of learning for every year a student spent in their schools.

Take my word for it: In urban education, that just doesn't happen.

It was impressive, but perhaps it wasn't enough. As these charter leaders later discovered, to their dismay, better test scores weren't always translating into those students making it through college. That's the "grit" issue, the self-assurance, self-determination and life skills needed to overcome obstacles that middle-class college-goers barely notice. Yet another version of charter schools had to be built atop the scaffolding of that last version to achieve the ultimate goal: Schools where students became self-directed learners who would persevere through college to earn a degree.

Here's a highly simplified, one-paragraph history of charters: Roughly speaking, version 1.0 charters proved you could make a difference with "no excuses" practices, as in not accepting poverty as an excuse for failure to learn. They won academic gains mostly through efficiencies (never a wasted moment), high-energy teachers from top colleges determined to do whatever it took and a stringent culture – children walking silently, single file through hallways; uniforms; tough suspension policies. But in truth, no one was completely comfortable with that stiff culture, and, as charters moved into version 2.0, relying on CMOs to replicate high-performing schools, the best charters started edging away from the no-excuses model.

Version 3.0 charters, a process now well underway, reveal a more relaxed culture, more akin to what you see in the best private schools (see my Brooke profile later in the book), and focus on skills likely to get students not just into college but through college.

Designing these new schools, the 3.0 charters, is a new goal every bit as ambitious as what Hastings and Shalvey sketched out that day at Cafe Borrone. Interestingly, many of the same people

who built the initial wave of high-performing charters, including Shalvey – who by this time was a deputy director at the Bill & Melinda Gates Foundation overseeing its charter school grants – are now engaged with the new goal of molding the next generation of American classrooms.

By early 2016, the 3.0 project, the moon shot that would exponentially boost the number of successful college graduates who come from low-income families, was maturing. Again, the spark came from Silicon Valley, with Summit Public School's Diane Tavenner leading the way. This time, however, the new design was translating immediately to the East Coast, with Rhode Island's Blackstone Valley Prep agreeing to be an early adopter. Plus, East Coast charters were launching their own next-generation schools, with Achievement First, for example, pioneering its version in New Haven's Greenfield school.

Once again, schooling was being reinvented, with this band of reformers at the forefront.

The history of these high-performing charters couldn't be more different than a traditional history of charter schools. That traditional history, which everyone is hearing about this year as educators celebrate the 25th anniversary of the launch of the first charter school, starts in St. Paul, Minnesota, and slowly expands across the country until today, when we have 6,700 charter schools serving nearly 3 million students.

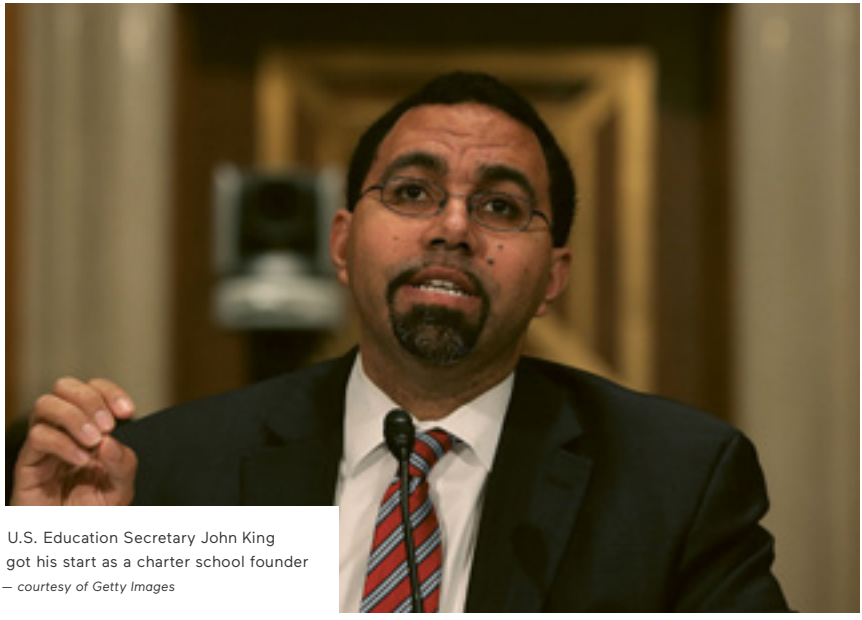
This is not that history.

In this history of high-performing classrooms, that first charter school in Minnesota barely warrants a footnote. In this history, there's no self-congratulation about reaching 6,700 charters. Instead

there's wonderment about why hundreds of those charters aren't shut down as low performers. In this history, the high-performing charters have about as much to do with the lower-performing charters as dogs have to do with cats.

This history, which starts in California, not Minnesota, has an end goal: Leveraging the lessons learned from this first generation of high-performing schools to create the elusive 3.0 charter – schools that can take poor and minority children and turn them into successful college graduates. This is not the history of charter schools; this is the history of the high performers and where they're headed next.

As any reader will quickly observe, the early pioneers are well educated whites; their students are almost all poor and minority.



U.S. Education Secretary John King got his start as a charter school founder
— courtesy of Getty Images

That's partly a reflection of these schools in their earliest launch years. Take Uncommon Schools, a charter group profiled in later chapters. All but one of the initial founders (U.S. Education Secretary John King) is white. But contrast that launch team with today's Uncommon Schools: 42 percent of the teachers and 30 percent of the school leaders are nonwhite. Its Summer Teaching Fellows program is one of several ways Uncommon pursues diversity.

Fifteen years ago, in the 2002-03 school year, only 29 percent of KIPP's school leaders were people of color. However, since the 2006-07 school year, that figure has ranged between 38 and 45 percent.

Today, the racial mixes at all the top charters are changing, but probably not fast enough for critics, especially African Americans in urban neighborhoods who complain that education reform still feels like something being done *to* them – not *with* them or *by* them. Despite that unease, however, low income, African-American parents in cities such as Newark, Washington and Los Angeles eagerly seek out these top schools, generating long wait lists. That raises the question at the core of this book: How did these successful schools come about? And the equally important follow-up question: Can these high performers make the transition to become authentic and sustainable neighborhood schools – schools where parents feel like they have the biggest stake?

The Treadmill *Revelation*

Kim Smith goes for a run

Stanford University
February 1998

Chapter 1

Many people would argue that there's no single spark

that over the years led to our national system of high-performing public charter school groups. Rather, the movement bubbled up organically from multiple sources at different times: The KIPP founders Mike Feinberg and Dave Levin starting schools in Houston and New York; Don Shalvey founding Aspire charters in California; Dacia Toll and Doug McCurry launching Amistad Academy in New Haven; Norman Atkins founding North Star Academy in Newark.

There's a lot of truth in that, but I would argue that there was, in fact, a single spark – a time when the concept of high performing charter management organizations snapped into focus. That time was the winter of 1998, and the improbable location was a treadmill in a cramped gym on the campus of Stanford University. There, second-year MBA student Kim Smith, who was on the founding team for Teach For America, was halfheartedly jogging while immersed in

her music. The playlist that included Fleetwood Mac, Toots and the Maytals, Marvin Gaye and Aaron Neville looped and looped as Smith thought through her challenge: How to make something of an organization that had a name, "NewSchools," but not much else.

For Smith, it had all started a year earlier when, as co-chair of the business school's entrepreneur club, she tried to figure out a way to land Jeff Bezos as a speaker. Her best bet was to ask a friend, who worked for the Silicon Valley venture capital firm Kleiner Perkins Caufield & Byers, to ask uber-famous investor John Doerr for help in landing Bezos. Doerr, who was active in education reform efforts, agreed, but with one condition: Help him make something of this idea hatched during an education session at Al Gore's house. In truth, all Doerr had at that point was a name: NewSchools. Would it just be education philanthropy, or would it be something more? Smith and Doerr shared the same worry and the same hope: America's failure to educate generations of poor and minority kids was unacceptable, yet the nation was possibly open to creative disruption. But how?

Kim Smith, a founder of NewSchools Venture Fund, 2003
— courtesy of Julie Petersen

Doerr came through on his end, with Bezos keynoting a conference at the business school, so it was up to Smith to produce on her end. Her thinking mashed together that day on the treadmill: Silicon Valley had disrupted nearly every industry except schools ...

why not schools? After all, Smith had been on the ground floor of TFA, a launch that had little to do with teacher shortages and everything to do with disrupting school staffing by drawing in ambitious college graduates who normally wouldn't consider taking a classroom job. It worked.

She was also thinking about the push by Don Shalvey and Reed Hastings – "Honestly, I think they were like chocolate and peanut butter coming together in a Reese's Cup moment" – to launch a group of connected charter schools. That meant scale – a relatively new concept for the field. At that time, nobody was using "CMO" to describe their effort, but Smith's reasoning, while plodding along the treadmill, was: Why couldn't entrepreneurial philanthropists come together to create networks of entrepreneurial education organizations? It wasn't just charters she had in mind that day, but over time that's where entrepreneurship has headed.

There was further mashing up that day. This was a time when "social entrepreneurs" were drawing a lot of attention, and Gregory Dees, considered the godfather of social entrepreneurship, had just spoken at Stanford. Smith, who heard Dees speak, stirred that into her mix of thoughts: Isn't the time right for introducing change agents into education? With thinkers and funders like Doerr, Silicon Valley provided the perfect cauldron for injecting continuous innovation into classrooms that hadn't changed their shape in decades.

Those treadmill revelations led to a paper by Smith laying out what the new organization, which came to be known as NewSchools Venture Fund, would look like. In 1999 the group held its first "summit," a San Francisco meeting that didn't start out as charters-only

NewSchools Venture Fund retreat, 2002
— courtesy of NewSchools Venture Fund

but that in recent years has become a must-attend for any aspiring charter leader. A two-page paper by Smith would later put a label on the movement: Creating CMOs – scaling up with quality – with the help of venture-capital-style philanthropic investing.

The idea soared – and so did the funding. The investments on NewSchools' website represent a who's who of the charters considered most likely to reach scale with quality.

In the ensuing years, groups such as the Charter School Growth Fund, the Walton Family Foundation and the federal Charter School Program would join in the cause – scaling up with quality. But the original concept, the concept we see today that allowed rapid expansions for KIPP, Uncommon, Achieve, Aspire, YES Prep, IDEA and many others, that concept was given wings that day on the Stanford treadmill.

Uncommon
Beginnings

Four entrepreneurs join forces
to build Uncommon Schools

Newark
September, 1997

Chapter 2

Norman Atkins, a journalist turned social entrepreneur,

helped launch New York's Robin Hood Foundation, which invests in anti-poverty programs. "I visited every soup kitchen, every homeless shelter and every program for people with AIDS," he said. "I was certain there was important work to do in basic survival support organizations, but at the same time I was thinking about how to break the cycle of poverty ... when I visited after-school programs, I struggled with the fact that these programs have to mop up at the end of the day for the failures of schools during the day."

For Atkins, changing schools was key – but putting philanthropy dollars into traditional public schools made no sense. After all, the Annenberg Foundation had invested $500 million in traditional public schools and was left with nothing to show for the investment.

Atkins moved his family to New Jersey, picked out Newark, clearly a needy city, and searched for a way to open a school. "I was

just walking around for two years, literally telling everyone I wanted to start a school. I had no idea what I was saying." But that all suddenly changed when then-governor Christine Todd Whitman signed a charter school law. "It was a compromise between Democrats who wanted to spend more money on education and Republicans who wanted vouchers," said Atkins.

Atkins began looking for a startup partner, someone with deep teaching experience. At the same time, Jamey Verrilli, a teacher and school leader at a small alternative school in Newark, was also looking for a startup partner. When Verrilli consulted one of his board members about starting a new school, he was advised: "'I met this young fella named Atkins. You should talk to him.' So I jotted his name down and – this is a true story – the phone rang literally as I hung up and the voice on the phone said, 'This is Norman Atkins. I wanted to reach out to you about your school.' So it was really serendipitous."

Atkins watched Verrilli teach a lesson, and then the two talked. "Norman is a former journalist; he just riddles you with questions. So we had a three-hour talk and I answered about 10,000 questions. He was feeling me out to see where we were aligned."

Verrilli, who came to Newark as part of the Jesuit Volunteer Corps, was motivated by the social justice movement. He wanted the school to include a strong community mission. Atkins was driven by academics. "It was a nice marriage," said Verrilli. "We put the two together and called those the two pillars of North Star."

To gather instructional ideas, they visited several schools in New York, including Dave Levin's school in the Bronx. Oddly, the best

sharing advice came from a school that launched in a tough neighborhood and was struggling. “They started out with what they thought was a state-of-the-art curriculum – project-based learning, interdisciplinary,” Verrilli said. “They wrote the curriculum for an entire year. Then the district sent them fifth-graders, none of whom could read, so their whole curriculum went out the window and they started over from scratch.”

Norman Atkins and Jamey Verrilli launched North Star in 1997 *– courtesy of Relay Graduate School of Education*

That school’s struggle proved to be invaluable to Atkins and Verrilli, who were preparing for their first crop of students, almost all of whom probably would be reading several grade levels behind. “We designed a curriculum that was going to meet their needs.”

One of the distinguishing features of any Uncommon school is the morning Community Circle, a spirited school-wide gathering involving African drums, call and response, academic exercises and awards – pretty much everything, all done loudly and at full speed. That Community Circle, which has been copied by many other charters, came from Verrilli watching the documentary *Eyes on the Prize* about the civil rights movement.

“I watched the Black Panthers do these meetings out in the parks where they’d gather and share inspirational messages,” said

Verrilli, "so I thought that was something that could be replicated." He tried it out in his alternative school, and it succeeded. Atkins added African drums to the mix, as well as values education through folktales, and thus was launched the widely imitated North Star Community Circle.

With Verrilli taking primary responsibility for teaching and curriculum and Atkins taking over operations, it fell to Atkins to find a building.

"We must have looked at 50 or 70 buildings in Newark, and we finally found one in downtown where all the bus lines met. We were working with a group of parents who picked the name, North Star, for its symbolic precedent: The North Star was how slaves found their way to freedom, and it was also the name of Frederick Douglass's newspaper." North Star launched in 1997 with 72 students, fifth- and sixth-graders.

Early on, Atkins pioneered a practice that has proved key to the expansion of top charters: borrowing from the best. He met with KIPP's Dave Levin. He met with Brett Peiser, who was running South Boston Harbor Academy (later renamed Boston Collegiate Charter School). He met with John King (currently Secretary of Education) and Evan Rudall from Boston's Roxbury Prep. Then came Doug Lemov from Boston's Academy of the Pacific Rim. Soon, Atkins and North Star became a touchstone for top charter leaders on the East Coast. Dacia Toll and Doug McCurry, the Amistad Academy founders who went on to build the Achievement First network, came to visit in his second year.

As Atkins describes it, from the very beginning he had two

circles to wrap himself in. The first was the network of school entrepreneurs that would become Uncommon Schools. And the second circle was the fellow school leaders in the New York area, Toll and Levin. “I would say that Dave Levin was Teacher Zero of our movement. He was the teacher who really started to instruct in a culture that was new and positive.”

In 2000, PBS captured some of this early charter history in a documentary narrated by syndicated columnist Clarence Page.

But Atkins’s role in the broader movement goes beyond North Star; he became a seminal member of this band of reformers, joining with other top charter entrepreneurs to form the celebrated Uncommon Schools. His key collaborators: Peiser, Rudall and Lemov.

Brett Peiser

The son of teachers who both became principals in New York City schools, Peiser became a New York City teacher himself. After several years in the classroom, he decided to step back and study education policy, which landed him at Harvard’s Kennedy School of Government. That put him in Boston just as the state legislature passed an expansion of the original charter school law, during the same time that Evan Rudall and John King launched Roxbury Prep and Doug Lemov started Academy of the Pacific Rim.

Convinced that New York would never pass its own charter school law (it did, later), Peiser began circulating within the tiny circle

Peiser and Atkins agreed on the bottom line: “How do we impact more students?” That was the beginning of Uncommon Schools.

Brett Peiser in 1998, the night before Boston Collegiate, formerly South Boston Harbor Academy, opened

— courtesy of Brett Peiser


SPIKY
SUSAN FORTIN
Susan Fortin
Susan Fortin

Uncommon CEO Brett Peiser
— *photo by Richard Whitmire*

of Boston charter entrepreneurs, looking for opportunity there. One day while participating in a group effort to write standards for the about-to-open Academy of the Pacific Rim, he ended up sitting next to Lemov. "He was writing the English standards; I was writing the history standards." It was the first time they met, and Lemov talked to Peiser about helping to start a new school. At that moment, it all jelled for Peiser. He would definitely start his own charter, which he did, with a Kennedy School colleague: South Boston Harbor Academy.

Launching that first charter came partly from a stiff nudge from Linda Brown (the leader of Building Excellent Schools, about whom I'll be writing more later), who encouraged Peiser to choose South Boston, which had just endured a rash of teen suicides. Brown always seemed to live up to her nickname as a charter Svengali: the godmother. At the time, she ran a Boston-based organization that acted as a charter resource center. Attending meetings there were Peiser, King and Rudall. "You had these people coming to meetings and

talking about best practices, then going to visit each other's schools," said Peiser. "I remember going to visit Roxbury Prep early on, looking at the way John was overseeing teachers and the way Evan was monitoring student information systems." In return, Peiser gave them his student handbook that contained all the discipline systems.

The final piece of the puzzle came together when Peiser was speaking at Columbia University on a panel about curriculum standards. After the panel, he was approached by someone he had never met: Norman Atkins. "He told me he liked what I said and told me about running a charter school called North Star in Newark," said Peiser. Soon, Peiser visited North Star. "I was blown away by the student culture and obvious pride. All these kids came up to me and told me their names and said, 'Welcome to North Star.'"

The original building that housed Boston Collegiate, formerly South Boston Harbor Academy, across from a power plant and inside an industrial park
— courtesy of Brett Peiser

As the relationship grew, Atkins was soon whispering in Peiser's ear, "We should do something together." Peiser and Atkins agreed on the bottom line: "How do we impact more students?" That was the beginning of Uncommon Schools.

Evan Rudall

Getting kicked out of one of Chicago's most elite schools, the University of Chicago Laboratory School, may seem like an odd launching pad for a charter school founder, but that was Rudall's spark. Rudall, who describes himself as a "fairly challenged" middle school student, got himself expelled in eighth grade for a long list of rebellious behaviors.

That expulsion triggered a radical change in Rudall's life. Moving from the Lab School to a Chicago public high school meant moving from a school where most students were headed to selective colleges to a high school that was 90 percent African-American and Latino and mostly poor and where "half my ninth-grade classmates did not graduate with me four years later."

Rudall was shocked by the educational inequity he witnessed. "The school was periodically violent, and there were lots of teachers who were indifferent, who wore headphones during their office hours and put do-not-disturb signs on their doors. I had a 10th-grade teacher who fell asleep in class. Those disparities struck me as incredibly unjust. At the age of 15, the seed was planted in me that I wanted to address that disparity."

Rudall graduated from high school in 1988, and he then graduated from Wesleyan University. After college, he took a job at a private school in Louisville and ran a Summer Bridge program there for poor kids. "I fell in love with working with students who were challenged in one way or another, who were rebellious or resistant, because I could relate to that so easily."

Determined to create a full-time school that would provide what Summer Bridge offered, Rudall enrolled at Harvard's Graduate School of Education. "I spent the year there focused on charter schools, which at the time was a very small movement. I was hoping to open a small school in Chicago."

But when an alumnus from his high school started a Boston charter school, City on a Hill, Rudall changed his plans and focused on Boston, selecting the high-poverty Roxbury neighborhood, where he did his principal internship, as the neighborhood most in need of a charter.

"The night before I submitted the charter application, I went out to dinner with John King. It was the first time I had met John. My wife and her sister went to Harvard with John, so my wife introduced me to John, who was a teacher at City on a Hill. We spent the entire dinner, three or four hours, talking about education."

After the dinner, Rudall went home and rewrote much of his charter application to incorporate King's ideas. "He was so insightful, as he always is. I ended up pulling an all-nighter to restructure the application and submitted it the next day."

That first dinner at an Indian restaurant in Somerville set the stage. Several dinners later, King agreed to join Rudall as co-director:

King would handle curriculum and instruction, Rudall would take care of operations and finance, and both would work closely with students and families.

Recruiting families proved to be relatively easy. “We had 80 families sign up for the school based only on information sessions that I gave by myself – despite the fact we had no building, no teachers hired, no curriculum in place, and the school was obviously unproven. It just shows how eager families were for another option. They were attracted to the promise of rigorous instruction, deep caring for students and a safe, structured environment. That’s what we promised.”

Rudall tells the same story many charter entrepreneurs tell: Linda Brown from Building Excellent Schools was a key player, especially with fundraising and ensuring the application process went smoothly. “I’m not sure Roxbury Prep would have opened without Linda.”

At the last minute, Rudall found unused space in a nursing home, space that the school continues to use. Roxbury Prep opened in the fall of 1999 and within a few years led the state in scoring on the eighth-grade MCAS, a state test that at the time was considered the nation’s most rigorous.

During Roxbury’s Prep first year, Rudall got to know the other players in the Northeast charter world, including Brett Peiser and Norman Atkins. “I relied heavily on Brett to work through our first-year challenges,” said Rudall. Atkins was part of a group that visited Roxbury Prep to evaluate it for a possible grant. “My introduction to Norman was five hours of cross-examination … We fell in love with

each other that day and stayed in touch."

Rudall left Roxbury Prep for law school but never lost his desire to be involved in education. While still in law school, Rudall accepted Atkins's offer to become Uncommon's chief operating officer. "So I spent my third year of law school as the COO of Uncommon, which meant I never went to class."

King, who left Roxbury Prep for law school at Yale, also

Boston mayor Thomas Menino with Evan Rudall and John King
— *courtesy of Evan Rudall*

agreed to join Uncommon, and Roxbury Prep was folded into the Uncommon network. "Norman had this brilliant vision to bring together several people who had run high-performing charters, and it paid huge dividends."

In 2012, Rudall left Uncommon to start the nonprofit Zearn, a digital math program, which to him was a way of reaching far more

impoverished kids than Uncommon and other top charters could possibly reach. Today, Rudall works as a consultant to district leaders and charter management organizations.

Doug Lemov

Lemov was on his way to earning a Ph.D. in English at Indiana University when he got an unusual request: Would you be willing to coach some football players who are struggling in their English classes? Because Lemov had been a serious soccer player as an undergraduate student, and also because he had taught at a private school, it was assumed he could relate to the athletes as they came to special study tables.

One of the football players he tutored was a redshirt freshman who had gone to a high school in the Bronx. "He was a real gentleman, a decent guy in every way, but he was struggling academically. So I said, 'Why don't you write a paragraph about yourself,' which he did. I took one look at it and thought, 'Holy shit, he can't write a complete sentence.' I can still see it in my mind's eye, on a yellow piece of paper written in black ink. There wasn't a complete sentence in it. It was just unbelievable."

Curious as to how the football player had been admitted, Lemov visited the athletic office, where he learned, much to his surprise, that the player was there on his own merits: He had good grades and good recommendations. So they admitted him.

Doug Lemov started Academy of the Pacific Rim and later joined Uncommon — *courtesy of Jossey-Bass*

"All of a sudden it hit me, that here was this decent kid who wanted to do the right thing, gentlemanly, never a trouble-maker in class, and his high school teachers all wanted to do right by him because he was so talented, and nobody wanted to be the one to crap on his dreams by saying, 'Actually you can't write, so I can't pass you.'" The sad result, of course, is that the player stood no chance to make it academically at Indiana University and eventually dropped out and returned to the Bronx.

"It was an epiphany to me about social promotion. Those teachers thought they were helping someone, but what they were really doing was making themselves feel better. In the end, they hurt this guy badly."

That epiphany, which translated into a desire to build better schools for urban kids, prompted Lemov to accept an offer from a college friend from Hamilton College, Stacey Boyd, who wanted to start a charter school in Boston (Academy of the Pacific Rim, which launched in 1997). After one year serving as dean of students, Lemov took over as head of the school.

In those days, the charter school movement in Boston was tiny, so it was only a matter of time before he met Brett Peiser, Norman Atkins and Linda Brown, all part of Boston's inner circle of charter entrepreneurs. "Linda was like everyone's fairy godmother,"

said Lemov. “Every time you’d come across a problem that seemed to have no solution, she’d say, ‘OK, come on in and we’ll figure it out.’” Both Brown and Atkins served as master connectors. “From the outset it seemed like everyone knew Norman and he knew everyone.”

The next steps for Lemov were working for the state charter authorizer and then attending business school, where he formulated a plan to launch a group of charter schools in upstate New York, an area he had gotten to know while at Hamilton College. “I wrote a business plan and showed it to a bunch of people, including Norman, who said it looked good but suggested I join with him to pursue a similar plan.” That plan was Uncommon Schools, designed as essentially a federation of charters with separate, semi-independent regions, including True North, a cluster run by Lemov in upstate New York with schools in Rochester and Troy.

“All of a sudden … it conferred status and privilege on the kids who were doing the right thing.”

Like other top charter operators, Lemov borrowed heavily from other charters, especially Roxbury Prep and Aspire. It’s the little “borrowings” that Lemov enjoys citing. From a KIPP school in Albany, he learned how to re-do school bathrooms, which for most schools are the source of many discipline problems – from graffiti to the sparks that lead to later-in-the-day scuffles.

“It’s hard to manage that space, so at this school they flipped the bathrooms on their head. They put posters on the walls in the boys’ restroom. There were carpets in front of the sinks, ferns like

what you might see in a law office bathroom, liquid soap dispensers. They made it an attractive, civilized place."

The unspoken message: Respect this place or it will get replaced with the traditional disgusting bathrooms. "Basically, they took a problem area and made it super positive," said Lemov. So the True North schools did the same.

Another borrowing from the KIPP school in Albany: A "millionaires" club that rewards the kids whose good behavior usually gets ignored. Those chosen for the club get their own "millionaires" tables at lunch. "There are board games you can play during lunch, a tablecloth, salt and pepper shakers. All of a sudden, it was like a restaurant, and it conferred status and privilege on the kids who were doing the right thing." So True North did the same.

Today, Lemov remains part of Uncommon, but he has shifted to full-time teacher-training work that was launched by his best-selling book *Teach Like a Champion*, which lays out the successful teaching methods pioneered by top charter teachers. More than a million copies of his teaching books have been bought by teachers, many of them in traditional schools, thus making Lemov perhaps the most powerful example of charter/district crossover influence.

Interestingly, all the Uncommon leaders have branched out into crossover work, with Atkins co-founding Relay Graduate School of Education (discussed in a later chapter), Rudall starting up Zearn, and Peiser becoming Uncommon's CEO overseeing charter/district collaborations in Brooklyn's high-poverty Brownsville neighborhood.

That's no coincidence, says Lemov.

"I think it comes directly from our federalist structure, where

educators from each leg of the federation enjoy independence but also reach out to others for resources and advice. It's an organization that's built to learn. It starts with the humility of admitting we don't have all the answers and we probably never will, so let's design ourselves, learn as much as we can as fast as we can, and then share. It's embedded in our culture."

That fast, independent, Uncommon-style learning spun off best-selling books, a successful graduate school of education that breaks all the rules, and a successful online learning company. And from Paul Bambrick-Santoyo, who later joined North Star and now serves as one of Uncommon's two chief schools officers along with fellow North Star alum Julie Jackson, came the influential book *Driven by Data*, which has become the go-to source for both charter and traditional teachers for designing instruction around data.

All of this stems from one charter group, Uncommon Schools, which today has 44 schools in three states serving 14,000 students, with Peiser the chief executive officer.

Uncommon graduates earn bachelor's degrees at five times the national rate for graduates from low-income schools. In 2013, Uncommon won the Broad Prize for Public Charter Schools. Later, I will offer close-ups of Uncommon schools in both Newark and New York City.

California *Dreaming*

How Hastings and Shalvey beat the odds

Sacramento
1992

Chapter 3

As best as I can tell,

the story behind winning the law that made California the nation's charter school powerhouse (in 2016, there were 1,174 independent charter schools in California, roughly a sixth of all charters in the country) has never been properly told. It's kind of a wild and crazy story, one that even tops the colorful story of the original charter legislation that passed in 1992. That law featured a late-night Senate maneuver (thanks to the quick legislative cunning of former state Senator Gary K. Hart) that pushed through a strong charter school bill by completely skunking the clueless Assembly, which was left holding its now-useless, watered-down charter bill. Had the Assembly version passed, California would probably be a mere mention in this book.

But that original bill had a tight cap on charters. After all, this is the bluest state in the country, a state where the Democratic Party had essentially turned itself over to the California Teachers

Association, which despises charters. Lifting the cap seemed unlikely. But it happened. How?

There are two ways of answering that question. First way: Just luck. Second way: There's no such thing as luck, not if you're dealing with a gregarious Irishman who always sees the four-leaf clover in a weed patch, always knows just the right person to get something done and always picks the right horse to bet on. That would be Don Shalvey, a musical guy, a onetime amateur DJ, who organizes his world by tunes (on Twitter, he's @doowopdon) and who is best summed up by Norman Atkins: "He's the guy who, at the end of the day, you want to end up sitting next to at the bar."

In fact, that's how I first met Shalvey in the spring of 2015 in Sacramento. He was someone I had gotten to know via phone interviews, as he was a mentor to John Danner, the key founder of Rocketship Charter Schools, and I was writing a book on Rocketship. But this was our first in-person meeting, scheduled midday at a downtown hotel. Wait, said Shalvey. We can do better than this lobby. I know this bar across the street. Sure enough, it was the perfect place to talk, with cheese and California wine. Anyone who knows Shalvey will relate to this story. He's a cherubic sort of guy who always seeks out the potential fun in any event, and he always knows the location of the nearest great bar or restaurant.

This story starts with Shalvey as assistant superintendent of schools in Lodi, California, a farming community. He interviewed for a job as superintendent of San Carlos schools, in Silicon Valley. During the interview, a board member told Shalvey that San Carlos students performed well academically but both the students and the

staff seemed kind of grim. “So my question to you is: What would you do to increase the amount of fun the students and staff could have while in school?” Shalvey was stunned. This was his kind of place. What followed was a years-long love affair between the board and Shalvey, a rarity that allowed Shalvey unprecedented powers to experiment.

The next step in the tale occurs in 1992, when California legislators passed a training-wheels version of a charter law allowing just 100 such schools to open statewide. Shalvey immediately saw the potential and pitched to his teachers the creation of a charter within an existing school. The teachers seemed interested but in the end decided it was too newish and declined. But feeling apologetic about the rejection, they assured Shalvey: Go ahead and launch a separate charter; we won’t oppose you. No union opposition – a true gift that

Reed Hastings (center) with Don Shalvey (second from right) at the San Carlos Charter Learning Center on May 8, 1998, when Gov. Pete Wilson came to the charter to sign AB 544 into law
— courtesy of Don Shalvey

was partly due to guilt and partly due to the positive relationship Shalvey had built with the union.

When Shalvey applied for a charter, one of only eight in that first year, the state official charged with approving charters happened to be a good friend. Not surprisingly, Shalvey's application ended up at the top of the pile, making San Carlos California's first charter. Luck or good networking?

When Shalvey agreed to join Reed Hastings in a campaign to expand that 1992 charter law, they both realized they were newbies in the petition game, guided only by a rumpled yellow paperback copy of *The Initiative Cookbook*, written by environmental activists, which had to be reverse-engineered to work for a charter school initiative.

But they quickly made new friends. "What Reed and I learned from going to Sacramento," said Shalvey, "was that if you wait around until 5 p.m., and you have a couple bottles of wine, you can actually get into a legislator's office and have a conversation." The most important of those chats was with the all-powerful state Senator John Burton, the Senate's president pro tempore. At first, Burton wasn't sure he could help. After all, everyone knew the unions hated charters and the unions were the heavyweights in town. "I was told you guys were the devil," Burton told Shalvey and Hastings when they first met. "But here you are, a school superintendent and a tech guy. I don't see any horns."

Later, seemingly out of nowhere, Burton asked Shalvey: "Is the Carlos Club still open?"

Shalvey was shocked. Burton was asking about a divey downtown bar across from the train station. Burton explained his

interest: “As kids, my brother and I would swim in the nearby quarry. Afterwards, we would go to the Carlos Club because we could always get served. We went there a lot.”

As Shalvey and Hastings were driving home, Hastings had an idea: Let’s go to the Carlos Club and gather signatures. So they did. Shalvey walked through the door and introduced himself to the imbibers – not exactly the usual duties of a superintendent of schools. But they got a warm reception and soon had the signatures of two dozen bar patrons – signatures they sent to Burton, who would end up supporting the bill. Did the impulsive detour to the Carlos Club seal the deal? No way of knowing. But it’s definitely possible.

At this point, Hastings and Shalvey were on a roll, and the California Teachers Association realized it. Normally, the CTA would devote its dollars to crush a petition like this, but this time the union had other issues on its platter, other petitions they worried about more, such as a proposition pushed by then-governor Pete Wilson that would have limited education spending. The lesser of the threats, the CTA decided, was the charter petition. After all, charters were new and didn’t seem that threatening. How many would really get launched? “So the CTA contacted us and said, We don’t like what you’re doing, but we don’t hate it enough to spend money to defeat it,” Shalvey recalled. “We want to spend our money defeating the governor’s petition.”

“We don’t like what you’re doing, but we don’t hate it enough to spend money to defeat it.”

The final deal with the CTA: If Shalvey and Hastings dropped their proposition drive, the union would not oppose them in a legislative vote. That's a decision the CTA would desperately love to recall. Not only did a bill pass that essentially green-lighted an unlimited number of charter schools, including schools that appealed to middle-class parents, but the bill included a provision barely noticed at the time, certainly not by the unions: A single board of directors could oversee multiple charters. Sounds minor, right? It seemed that way at the time. But that was all Shalvey needed: That provision led to Aspire, the nation's first charter management organization, a model that would be copied around the country.

In May 1998, Gov. Wilson came to Shalvey's San Carlos charter school, where it all started, to sign the bill, AB554. After the signing, Hastings and Shalvey went out to lunch to celebrate. During the lunch, they realized the petition drive had $403,000 in unspent money. Quickly, they agreed on what to do: Shift the money into a nonprofit to launch what would become Aspire schools.

That was the final winning roll of the hot dice. The result of it all is breathtaking: For the 2015-16 school year, about 581,100 California students attended charters, with 80 more charters opening up for the year, bringing the total to 1,174 independent schools. Los Angeles now leads the nation in the number of charter schools (195), and the students in those charters are greatly outperforming their equivalents in traditional schools. Aspire charters serve 15,000 students in 38 schools, and Shalvey became a mentor to many of the top charter groups in the country. At its 2016 annual meeting in Long Beach, the California Charter Schools Association announced a new

goal: 1 million students by 2022.

The against-all-odds push to win that law beat those odds. Irish luck was at most a minor factor. This was a strategic campaign waged by an entrepreneur who made two fortunes in Silicon Valley and a charismatic superintendent. Never underestimate a team like that.

The Steve Barr *Story*

This is more about politics than education

California
Late 1990s

Chapter 4

There are many stories of charter founders that,

for reasons of time, won't get told in *The Founders*. Steve Barr's start-up story, however, needs telling, mostly because Barr brought a new sensibility to the charter world – a realization that education reform is as much about politics as education. Organizing parents, giving them opportunities to change the lives of their children by becoming fiercely engaged with a cause, is a political revolution.

And who better to launch a political revolution than a non-educator political whiz like Steve Barr, the co-founder of Rock the Vote who went on to become a community organizer for Democrats and was intensely involved with Bill Clinton's bid for the presidency.

So many well-intended social change agents around the country launched charter schools, only to find they could do no better than the horrible public schools they hoped to supplant. The real question about Barr is, How, as an education outsider, did he avoid

that fate? By contrast, Barr's Green Dot schools ran with the best from the beginning and today remain firmly in the elite top fifth of charters.

That story starts with Barr's own unique history as someone who grew up in a single-parent home with a waitress mother who struggled to make ends meet – so much so that at times Barr ended up in foster homes. The key moment in Barr's life happened when he was 14 and his mother moved the family just seven blocks, the exact distance needed to shift her son from San Jose schools to the world-class Cupertino schools attended by Silicon Valley's elite, the schools that Steve Jobs attended.

"I connected because I was a pretty good basketball player," Barr said. "Immediately I awakened to the fact that every kid talked about going to college like it was a birthright, not a fantasy. In my family, we had never talked about college. Mostly, there were a lot of conversations about how we were going to make it to Friday, which was payday."

For Barr's mother, the new school was intimidating. She would attend parent meetings, listen to Hewlett-Packard engineers debate education and swear to never return. But for Barr, Cupertino High School was a perfect fit. "I became loud; my personality just fit right in. I became student body president."

Other members of the Barr family had their struggles. Steve's younger brother was the opposite. "He wore horn-rimmed glasses that never quite seemed to fit and always had tape on them. He wasn't into sports but joined the band." But that only made things worse. He became the chubby dork lugging a tuba on and off school buses. Whereas Steve was showered with attention from the faculty, his

brother got none. Whereas Steve went to the University of California, Santa Barbara, his brother went into the Navy.

After the Navy, the brother lost his leg in a motorcycle accident. "Over time, after a lot of painful operations, he did every drug

Steve Barr with presidents Ronald Reagan and Bill Clinton
— *courtesy of Steve Barr*

in the world you could do. At the age of 30 he passed away from a drug overdose of pain medication."

Over those years, Barr always asked himself: How could two kids who come from the same family have completely different outcomes? How can we build schools that are small enough and powerful enough to find something powerful in each kid? It would take Barr years to answer that second question.

Even while working in politics, Barr stayed current with education, in part by mentoring students at Jordan High School in Watts.

Steve Barr at a Green Dot graduation
— *courtesy of Green Dot*

"They were incredibly articulate about what was right and wrong with their school." What they knew, and told Barr, was that teachers had incredibly low expectations of their ability to learn. The students he mentored had B averages, but Barr knew something was amiss with those B averages. "Almost every one of them, after leaving Jordan, washed out of community college or college after just one semester," said Barr. "I remember thinking how horrible that was. You show up

at a place you've spent your life preparing for, and you get your butt kicked."

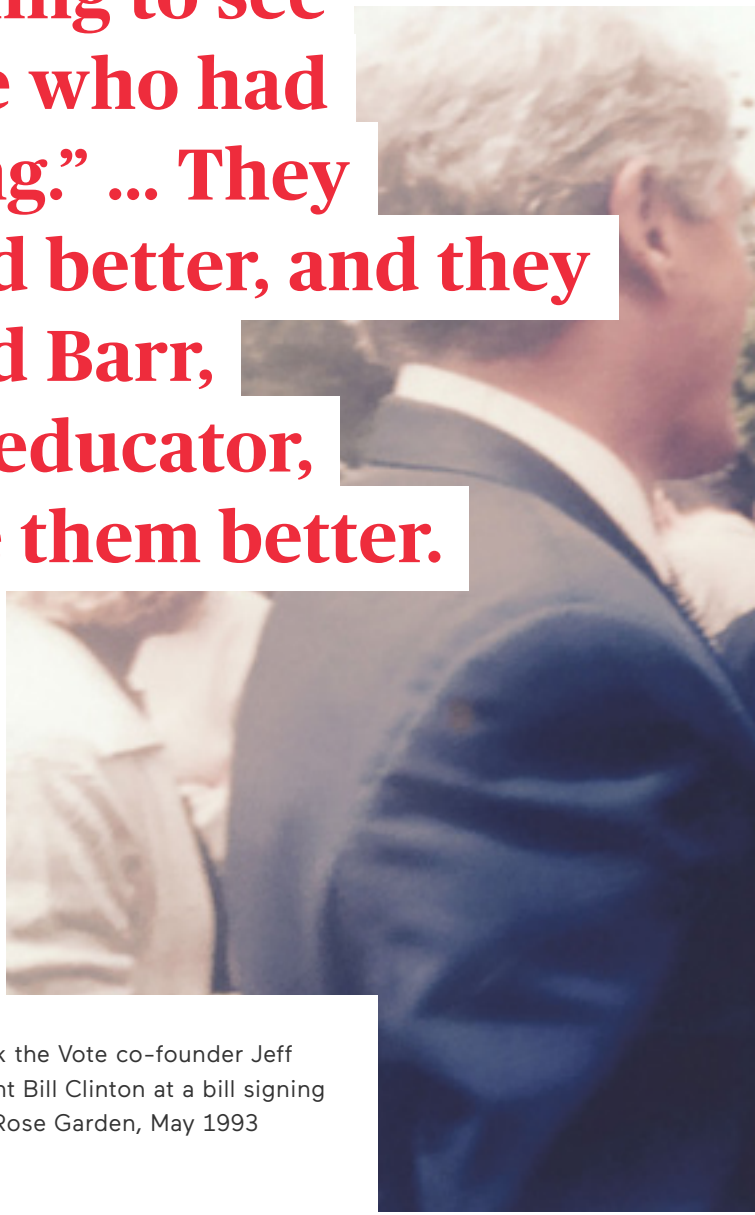
Everything in Barr's political life kept pointing back to school as the place where real revolution had to occur. One of Barr's college mentors was Gary Hart, the California legislator who pushed through the state's first charter school law. His advice to Barr: "Go see this guy named Reed Hastings. I hear he's trying to expand the law." Barr had never heard of Hastings, who had not yet launched Netflix, but he pursued the tip and showed up at Don Shalvey's school on the day of the President Clinton press conference.

Being Steve Barr, he had to take a detour by cutting out early to see a San Francisco Giants game at Candlestick Park. "I made it just in time to watch a backup catcher named Brian Johnson hit a walk-off home run in the ninth inning to beat the Dodgers in a playoff game."

But Barr didn't forget what he saw in San Carlos that day. Soon he would join Hastings and Shalvey in their campaign to open up the charter law. Barr, who was trained as a political organizer, brought invaluable political acumen to the effort. To the buttoned-up Hastings and the schools-focused Shalvey, Barr would prove to be a colorful, outsized force, pulling up to strategy sessions in his convertible with his brown chocolate lab named Jerry Brown.

Just one Barr story from that period: The drive to gather signatures to force a statewide referendum on lifting the charter cap seemed bogged down, so one day Barr phoned Hastings and asked him for the closest supermarket to his home in Santa Monica. It was a Safeway. "Let's meet there tomorrow with some petitions and figure out what works." Barr was just the guy: "As someone who is trained

“It was so amazingly humbling to see people who had nothing.” ... They wanted better, and they trusted Barr, a non-educator, to give them better.



Steve Barr with Rock the Vote co-founder Jeff Ayeroff and President Bill Clinton at a bill signing in the White House Rose Garden, May 1993

— courtesy of Steve Barr

as an organizer, you know that the art of it all is the 30 seconds you have between someone getting out of the car and going to get milk and eggs. That's the only time you have to capture their attention."

Barr watched Hastings go first. The earnest, brilliant, issues-oriented Hastings proved to be useless as a petition-gatherer. "He would go up to people and start explaining what charter schools were, all while people were putting their keys in their purses and dragging their kids. It was just too much." Charter schools were so new that few knew what they were, and even fewer wanted to listen to a lecture about them. So Barr asked Hastings to step aside and let him try. To the next customer, Barr said: "We have an initiative that's going to dramatically improve public schools. Interested?" The customer stopped, listened and signed. If shoppers asked about charters, they got the full explanation. If not, Barr just left the pitch as "great public schools." It worked. The petition drive was back on track.

Often, Barr would offer to chauffeur Shalvey as he made his political stops, using that time as a sort of informal graduate course on how to open and run a charter school. "I knew if I had Don in the car for a half-hour I could do a little small talk about the Phillies and Dodgers or whatever was going on in sports and then transition over to my questions about starting a charter. Nobody builds a school out of their ass from scratch; that's just not a skill set that a lot of people know how to do. And Don was the best at this, so I tried to get as much out of him as I could."

To site a school, Shalvey advised Barr to seek out the highest-need neighborhood in all of L.A., which Barr determined to be Lennox. "It's two unincorporated square miles right under the LAX

flight pattern, where 99 percent of the families live under the poverty level and probably 60 to 70 percent of the people are undocumented." Students there attended Hawthorne High School, once the school attended by wealthy whites, including the Beach Boys. But by 1999, when Barr was preparing to open his first school, Hawthorne had turned into an all-minority dropout factory.

In a risky move, Barr decided to do what most charter founders avoid: start a high school. Most charter founders prefer to start with elementary or middle schools. Their rationale is understandable: How, starting in high school, do you make up for years of educational neglect? But in Lennox, high school was the greatest need. Wasn't seeking out the greatest need what Shalvey advised?

For help in writing a charter for a high school, Barr visited Leadership High School in San Francisco. "I downloaded their charter and used a lot of it. It was the only high school template around. People aren't very territorial about their charter work. I've lent the Green Dot charter to almost everybody." To get a sense of school board politics, Barr drove to Stockton to watch Shalvey present an Aspire charter school proposal. "I give him a lot of credit for wanting to suck up everything imaginable," said Shalvey.

The name Green Dot was an inspiration that arose one day when Barr was sitting on a sofa reading an article in the *Los Angeles Times* about how the school district was 100 schools short of serving students. In the article, red dots showed the areas of greatest need, which not surprisingly were all the highest-poverty neighborhoods. "I remembered thinking: How do you fall 100 schools short? Why hasn't anyone done anything about it? I thought: How do you take

red dots and turn them into green dots? So I started with this idea that we would call our schools Green Dot."

Canvassing the Lennox neighborhood to seek out potential students was an area where Barr needed no assist. Isn't that what a political organizer does? Barr knocked on every door in Lennox (the kids called it Little Tijuana because it was unincorporated and looked like a Mexican village). As it turns out, parents there were hungry for better school options. Barr recalls a late-night meeting about the charter where every seat in the auditorium was filled. "I was the only white person in the room, and I had a translator."

"Why hasn't anyone done anything about it? I thought: How do you take red dots and turn them into green dots?"

In the end, 150 students signed up for 140 slots. "Later I went out in the parking lot and was shaking. Then I threw up. I don't think it was just nerves. I was like, 'Wow, what did I just do?' People just gave me their kids ... It was so amazingly humbling to see people who had nothing – the people who make the beds, bus the tables and make the meals around LAX. All they had is their kids." They wanted better, and they trusted Barr, a non-educator, to give them better.

In 2000, Barr launched Animo Leadership Charter High School in Lennox. Today, Green Dot educates 11,000 students in communities across Los Angeles; Memphis, Tennessee; and Tacoma, Washington. Green Dot is most famous for insisting on collective bargaining and taking over existing schools, with the takeover of L.A.'s

infamous Locke High School drawing national attention.

But what should draw attention to Green Dot is the special chemistry of its launch philosophy. At parent meetings, Barr would say: "You are now revolutionaries. You are leaving a system that is not serving your kids well. That's the most dramatically forceful political act you can make ... I'm going to treat your kids just like they are in the toniest and richest schools in the city. I will be your headmaster. Here's my cell number, here's my home phone, and here's my email. Anytime you feel like your kid's not being served, you call me."

After hearing that, many parents would start crying. "What I realized was, nobody had ever asked them to be involved. I had so many parents who wanted to be involved, I had to hire a parent just to organize the volunteers." For Barr and his parents, this wasn't just about launching a school. This was about challenging the system to change. "This was a political exercise as much as it was an education exercise."

But with its education successes, Green Dot also turned into an education revolution, by drawing from the best Don Shalvey and other top charter operators had to offer.

Part Two

Scaling Success

High school seniors at IDEA's 2016 College Signing Day

— courtesy of IDEA Public Schools

The *Gathering* at Denver's Warwick Hotel

A nearly forgotten, absolutely essential day in charter history

Denver
April 26, 2004

Chapter 5

If you were to add up all the charter school contributions

made by the Walton Family Foundation over the years, you would start with the hundreds of millions of dollars pumped into start-ups, then cite the foundation's role in launching the Charter School Growth Fund, then turn to its special support of KIPP charter schools and end up with its key role in backing Building Excellent Schools, the Boston-based group that has nurtured so many great charter startups.

But there's one more contribution that few would think to include on that list: sponsoring a Denver meeting of key charter leaders that oddly remains somewhat fuzzy in everyone's memory. Everyone agrees that it was definitely held in a nondescript, boring hotel meeting room. And everyone says it was a snowy winter day. But the date? The hotel? Few participants I talked to, including Walton staffers, could recall the hotel, but Uncommon CEO Brett Peiser dug up an ancient email: It was the Warwick Hotel, and the date was

April 26, 2004.

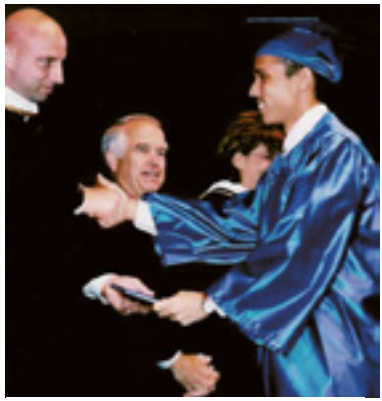
Why dwell on this ill-recalled meeting? Because it marks an important East Coast/West Coast gathering for leaders who before that meeting had lived in separate coastal worlds. Plus, it appears to be a launching pad for the model embraced by most great charters today: becoming part of a network. This meeting played a big part in the development of high-performing charter networks.

Cathy Lund, the Walton senior program officer who helped pull together that Denver event, said the purpose of the meeting was to sort out why some charters succeeded while others failed: Shouldn't funders like Walton start focusing on getting the great charters to replicate?

And so Walton invited high-performing charters from both coasts to meet in Denver and formulate a way to grow more winners. Chris Barbic from Houston-based YES Prep came, as did Norman Atkins and Brett Peiser, who ran the schools that would become Uncommon charters. Michael Milkie from Chicago's Noble Street charters showed up, as did Doug Lemov, Doug McCurry from Achievement First and Kim Smith from NewSchools Venture Fund. Jim Shelton from the Bill & Melinda Gates Foundation was in attendance, as was KIPP co-founder Mike Feinberg.

And the indomitable Linda Brown, the godmother of the top charter schools movement, was there as the head of the Boston-based Building Excellent Schools. Naturally. When wasn't she at a meeting like this? In this case, Brown was listed as a co-host, as was the then-named New York Charter School Research Center. The guest list was a who's who of the future networks of high-performing charter

schools. At the time, however, that was more of an aspiration than a reality.



Chris Barbic hands out diplomas at YES Prep's second graduation
— courtesy of Chris Barbic

Not surprisingly, the key speaker was Aspire's Don Shalvey, who gave everyone a pep talk on this newfangled arrangement that California's wildly pro-charter law allowed: CMOs, or charter management organizations. As Atkins recalls the meeting: "The Walton people introduced Don, who told how he created a CMO. Then they said they were encouraging people to do what he was doing and would give out planning grants for people to write a business plan that would lead to a CMO."

All kinds of lightbulbs started going off in Atkins's head. Soon, those lightbulbs would lead to the Uncommon group of charters. And the other top performers pushed in the same direction: learning and adopting best practices. That explains why so many of today's top performers can be found in CMOs. And it also explains why the leaders of most successful independent startup charters soon start dreaming of their own CMO.

The dream: Replicate quality at scale.

This Warwick Hotel meeting remains important for other reasons. For perhaps the first time, there were top charter leaders from both coasts sitting around swapping lessons learned. "I think every organization makes a list of the crap they haven't figured out yet,"

said Shalvey, "like getting new facilities green-lighted, or transportation, or special education. And you were sitting around talking about that list and someone would say, 'Oh, I worked on that,' and then you do a bunch of sharing."

For many of the key charter operators, this was the first time they had met one another. Brett Peiser recalls meeting Chris Barbic of YES Prep for the first time. And until that day, he had never met Shalvey. "He was incredibly entertaining," said Peiser.

At the time, Peiser and Atkins were running separate charter schools in Boston but thinking about combining efforts. They were drawn to Denver by Walton's offer of $50,000 planning grants to write CMO business plans (Walton's way of encouraging the best charters to grow) to build upon the innovation pioneered by Shalvey that at this point in time remained somewhat unknown to East Coast charter operators. Peiser recalls the last-minute application he and Atkins worked on: "We worked all night to come up with a business plan for what Uncommon Schools would look like, and then ended up at an all-night Kinko's to print it out."

"What I came away with was that there was a group of people out there doing the same thing we were trying to do."

The sharing among charter founders in that Denver meeting, more than any other factor, explains the very wide gap between the top 20 percent of charter schools and the rest of the field.

"What I came away with was that there was a group of people out there doing the same thing we

KIPP co-founder Mike Feinberg (right) at his Houston school
— courtesy of KIPP

were trying to do," said Peiser. "There was now a group of charters that were philosophically aligned about what a school should look like: longer day, longer year, the use of data, a focus on culture ... Michael Milkie was going to do it in Chicago. And Chris Barbic was going to do it in Houston. And there were these very charismatic people in California doing the same."

This meeting wasn't the only East Coast/West Coast charter get-together, nor was it the earliest. NewSchools Venture Fund had organized bicoastal sessions before this meeting, and charter funders such as the Broad and Gates foundations were already investing in charter management organizations. But this is the session that charter entrepreneurs seem to remember most – for its content, if not for

its particulars – and these were the crucial planning grants they said launched their organizations in new directions. Walton executives may not cite this meeting as one of their key accomplishments. But they should.

Joel Klein Finds His *Disruptive* Force

Who disrupts their own schools?

New York City
2002

Chapter 6

Could there be a more unlikely city to serve as a launchpad

for top charters than New York – home to the most powerful and politically savvy teachers union in the country, the United Federation of Teachers, and governed by a legislature in which the unions had invested millions of dollars over the years to ensure that Albany remained a steadfast friend? But it happened when Michael Bloomberg was elected mayor and appointed famed prosecutor Joel Klein to take over the education helm. Bloomberg didn't care that Klein had no experience running schools. He wanted a fearless change agent, and Klein proved to be that.

Klein took over the New York system in August 2002, and for the first year he remained silent on charters while he carried out big organizational changes. But in his second year, all that changed as he arranged meetings with the heads of top charter management organizations: Dave Levin from KIPP, Norman Atkins from Uncommon,

Dacia Toll from Achievement First and Geoffrey Canada from the Harlem Children's Zone. Klein set out to do something any other schools chief would consider insane: disrupt his own schools with built-in competitors. And Klein didn't want mere tinkering; he wanted big change, so at first he focused only on the major operators who could open multiple schools that would be high performers from the first day. What about the mom-and-pops, the one-off charter start-ups that might grow into KIPPs and Uncommons? Didn't they deserve support? Fuhgeddaboutit. This was New York; only the biggest and the best. And right away!

Michael Bloomberg and Joel Klein at a Harlem school
— courtesy of Getty Images

"I know with Dacia, she was skeptical at first," said Klein. "People didn't know how aggressive the city would be. But I pushed hard on this notion that I didn't want this to be a boutique business, that they would be in this for the long haul with multiple growth

opportunities ... I wanted to make New York the Silicon Valley for charter schools."

Toll recalls her first meeting with Klein, who asked that she expand her Connecticut operations to the city. The discussion seemed to go well, so she asked Klein: "OK, who [in the department] do I start the conversation with about Achievement First coming to the city?" Klein answered immediately: We just had the conversation, and you just agreed to open three schools. "It was like, boom!"

Toll checked quickly with Dave Levin and Norman Atkins, the KIPP and Uncommon leaders in New York, to see if they would object to the added competition. "They said they were more than OK. Their attitude was, 'This is going to be fun. Come to New York!'"

On July 14, 2003, the first day of school for KIPP S.T.A.R. in Harlem, the new strategy kicked off as Chancellor Klein and Mayor Bloomberg held a press conference at the school, which was housed in a former district office building. It was a clear shot across the bow: We will find space for top charters.

Said Bloomberg: "We said we would put children first when it comes to education – and by creating a new school where offices once stood, we are doing just that. We applaud KIPP for their academic achievements and for their continuing commitment to New York City's schoolchildren." Added Klein: "In just two weeks we have taken district office space that used to house bureaucracy and transformed it into a charter school in a community that needs innovative and excellent new schools ... We continue to work with charter schools throughout the city to share best practices for teaching and learning across all types of schools."

Most charter operators gravitate to cities where there's little hostility from unions and charter critics, meaning anywhere but New York. But Klein had a very large carrot to bend that maxim: $1-per-year rental fees inside existing school buildings. "We took the view, and it was controversial, that the schools belonged to the children," said Klein.

Uncommon's Brett Peiser, who would return to New York City to lead Uncommon's expansion there, was stunned by the freedom offered by Klein. The all-consuming need to find buildings in the most expensive city in the country suddenly ended. "It was a huge part of our growth," said Peiser. "I had just spent three years where all I did was work on the building [availability] issue." The idea that buildings were going to be taken care of meant Peiser and others could focus just on instruction. That was huge. "That's what moves people's hearts and is why people are excited about this work – not school construction bonds."

To support rapid charter growth (which would soon grow to about 20 school openings a year), Klein pulled together a collaboration of philanthropists who formed the NYC Center for Charter School Excellence, now called the NYC Charter Center. All this was to create schools to compete against his own traditional schools – unthinkable in any other city. "Most people running a school system are not eager to give up market share to the charter sector," said Klein. "But our overall view was that serving lives, particularly in high-poverty neighborhoods, you want to create as many options for good schools as you can."

But creating more good schools was only part of the plan. To

be fundamentally disruptive, those schools had to become permanent, not something future union-friendlier mayors could dismantle. The theory: "If you change the status quo for families, the schools become bulletproof," said Klein. That's why he ushered in only the top charters; they had to be good from opening day.

Joel Klein speaks to students and families at a Harlem Success Academy lottery, April 2009
— *courtesy of Getty Images*

One crucial development during the Klein years was granting in-school space to Success Academies, a charter group that has grown faster than the others, attracted more philanthropy than most, registered higher test scores – and drawn exponentially more criticism. All that arises from the unique personality of its founder, Eva Moskowitz, possibly the most polarizing, successful and controversial charter leader in the country.

"She had a rapid growth plan, and one that we were happy to support," said Klein. "Her whole modus operandi depended on us giving her space. It's hard to grow at the level she wanted to unless

she had co-located space."

Everything about Moskowitz is different, including her launch. As a former City Council member and head of the council's education committee, she held a now-legendary series of investigative hearings that skewered union work rules, leaving the unions furious and vowing revenge – a revenge they extracted in 2005 when Moskowitz launched an unsuccessful bid to be the Democratic nominee for Manhattan borough president.

It was during those hearings that Moskowitz began forming ideas for launching her own schools. "At the hearings, I was asking teachers and principals and coaches and custodians about every part of schooling, about what excellence looks like, about what needs to happen," she said. "Once I decided to open Success Academy, I criss-crossed the country finding every great example I could."

In addition to the New York City-area schools she visited – Uncommon, KIPP and Achievement First – she went west as well. From California's High Tech High, she came away impressed by the focus on rigor. From a Colorado charter school, she borrowed lessons learned on running project-based learning. The visits were not limited to charter schools. Parochial, private and traditional district schools were on her must-visit list as well.

In Queens, at Ozone Park's P.S. 65, she came across Paul Fucaloro, who was overseeing the lunchroom while peppering the students with math facts. She hired him to work at Success, where he ended up as director of pedagogy before he retired in 2014. At the prestigious Nightingale-Bamford private school in New York, she found a social studies program she admired. From the private,

all-girls Brearley School in New York she found a science focus that helped shape the intense concentration on science.

In spring 2016, as Success Academy was celebrating its 10th anniversary, Moskowitz ran 34 schools that enrolled 11,000 students, nearly all of whom register striking academic gains. (It was hardly a surprise when the network was named one of three finalists for the 2016 Broad Prize for Public Charter Schools.) In 2015, her minority-dominated schools, which operate in some of New York's poorest neighborhoods, scored among the best in New York state: Five of the top 10 schools in New York in math were Success Academy schools.

But there's no question that she has pioneered success at unprecedented scale by doing one thing differently.

For the next school year, 20,000 students applied for 3,228 spots. Moskowitz's long-term goal: 100 Success Academy locations.

Some of the controversy surrounding Moskowitz is of her own making; she's still bashing the unions, essentially fighting the same fight from her City Council days. And comparing academic results from her schools with those from neighborhood schools, when her schools enjoy important differences such as not "backfilling" classes after fourth grade, is unfair.

But there's no question that she has pioneered success at unprecedented scale by doing one thing different: offering incredibly rich academics to students who live in neighborhoods where that

just doesn't happen. Klein, who had his own clashes with Moskowitz, said the success at scale is the source of most of the attacks. "That's threatening to a lot of people."

Did Klein's master plan work out? According to independent researchers, New York charters come close to being the best in the nation. But did they change the status quo for city families? That question got an early test when union-friendlier Bill de Blasio was elected mayor and immediately went after the co-located charters despised by the unions. The result: Thousands of minority parents and their children turned out for massive demonstrations in both New York and Albany. These were parents for whom the status quo had definitely changed. De Blasio famously backed down. Bulletproof.

The Bloomberg/Klein period of school reform in New York involved scores of initiatives, most of them highly controversial and all drawing fire from the teachers unions. Only with hindsight is it possible to see that the most radical change Klein pushed, and certainly the most successful, was persuading the nation's top charter operators to make New York City a priority. He challenged them to disrupt his schools.

Klein's revolutionary charter-building initiative in New York points to a second phenomenon: These charter pioneers, the designers of charter groups such as KIPP, Achievement First and Aspire, didn't do this on their own. That success happened because a separate group of education entrepreneurs, district leaders such as Klein, philanthropy innovators such as Kim Smith of NewSchools and creative funders such as Reed Hastings all joined forces to make it possible.

Texas's *Great* IDEA

A new Lone Star charter success story

Austin, Texas
1997

Chapter 7

By now most everyone knows the story of the KIPP founders,

Dave Levin and Mike Feinberg, teaching by day in the Houston Independent School District, playing basketball together when they could, and then launching KIPP in 1994 with 48 students at Garcia Elementary School within the district. Fewer, however, know about the third member of that trio, Chris Barbic, who launched YES Prep, and the influence all three had in inspiring another top charter, IDEA, that started out serving poor kids in the Rio Grande Valley and has since expanded throughout the state. This Texas story is yet another tale of the best learning from the best and then expanding rapidly.

The story starts with Levin, Feinberg and Barbic rooming together as newbie teachers for Teach For America. At the time, Houston ISD was run by Rod Paige, who would later become U.S. Education Secretary. Paige was open to innovators and allowed Feinberg and Levin, as well as Barbic, to open a school within a school. Then,

around Christmas of 1997, the trio decided it was time to separate and open their respective charter schools, KIPP and YES Prep.

YES Prep founder Chris Barbic
— courtesy of Chris Barbic

Recalled Barbic: "So we all said, 'Hey, let's do this thing,' and we ended up writing the first charter together, so it was KIPP and YES under one charter. We were literally working on it and printing the thing out on the morning it was due." With no time to wait for mail delivery, Barbic and his wife raced to Austin in her Nissan Maxima. "I remember, when we hit Austin, there was this traffic jam, so my wife dropped me off and I ran five blocks. It was due at 5 p.m. and the timestamp said 4:48." Both charters were immediate successes, which meant the trio had credibility with state chartering officials

and influence with other aspiring startup educators.

One of those was Tom Torkelson, who signed on with Teach For America while he was a senior at Georgetown University in Washington, D.C. His assignment: the Rio Grande Valley. "I got out a map and couldn't find a place called the Rio Grande Valley." But he went, taking a job teaching fourth- and fifth-graders in the Donna Independent School District. "I was teaching kids [who were] three or four grades behind [grade level] and thinking this was impossible. They've only been in school five years. How could they already be that far behind? I was shocked that schools could be that bad."

Once a month, all the TFAers in the region met in McAllen for a "corps development" night. One night the invited guest was KIPP's Mike Feinberg, there to talk about his new KIPP charter. It made an impression, both on Torkelson and on his colleague JoAnn Gama, who taught in Donna just down the hall from Torkelson. Gama grew up in modest circumstances in Houston in the very neighborhood where the new KIPP was succeeding. She knew what it took to succeed there.

Soon after, Gama and Torkelson drove to see Feinberg's school. "Our big takeaway," said Gama, "was wow, this is not rocket science. There are just a lot of teachers who are actually teaching and kids learning. I think we were expecting a lot of fireworks and unbelievable teachers." In short, what they saw in Houston looked like something they could do in the Rio Grande Valley. Which they did, as co-founders.

When Torkelson drove to Austin to argue for his charter application, he was expecting a tough inquisition. But by chance Barbic,

who was beloved by the approving board, had just spoken to the board and put in a good word about Torkelson. “He told them, ‘Hey, you’re going to hear from a guy named Tom Torkelson a little later, and the best decision you guys can make today is to give this guy a charter, because his school is awesome and it’s going to make you guys proud to support charter schools.” After that warm-up, the inquisition turned into a coronation.

That was only the beginning of the sharing process. Looking at the quick expansions by KIPP, YES Prep and others, Torkelson concluded that IDEA also had to grow quickly. For road maps, he obtained multiple charter business plans, including those from KIPP, YES Prep, Aspire and Uncommon. After he visited Aspire and met with Don Shalvey, IDEA launched what became a rapid expansion: By 2015, IDEA served 24,000 students in 44 schools in the Rio Grande Valley, Austin and San Antonio. That same year, KIPP served 70,000 students in 183 schools around the country. YES Prep that year served 10,000 students in 15 schools.

That’s how the best multiply: They all know one another, and they all borrow from and swap with one another.

About a year ago, I visited IDEA during college signing day, a cross between graduation and pep rally. On this ear-splitting afternoon held in a minor league basketball arena, graduates walk to a center stage microphone to announce where they will attend college.

A mini-Jumbotron flashes the student’s name and the college, plus an asterisk if that student is a first-generation college-goer. I never saw the asterisks disappear. The announcement is witnessed by friends and family – but most important, younger students get the

IDEA co-founders JoAnn Gama and Tom Torkelson with students, 1999
— *courtesy of IDEA Public Schools*

unmistakable message: One day, this will be you.

On this day, there were 554 graduates. Of those, 19 were headed to the Ivy League. The three graduates going to Harvard included a "Dreamer" born in the U.S. to undocumented parents. She was one of 41 Dreamers who crossed the stage during signing ceremonies. The mother of graduate Gilberto Gutierrez, who was headed to MIT, worked in an IDEA school cafeteria.

A reasonable question: Is this an example of sending hundreds of ill-prepared graduates to college, where they have no hope of graduating? At IDEA, 62 percent of those entering college will graduate in six years. IDEA is now consciously working to boost that rate to 85 percent.

In May 2016, IDEA announced a $16 million foundation gift that should create 20 new schools in Austin. In June, IDEA won the

2016 Broad Prize for Public Charter Schools, a $250,000 award given to the charter that has done the best job improving student outcomes, closing the achievement gap and increasing graduation rates. The network's long-term goal: to serve 100,000 students by 2022.

Noble Street in *Chicago*

An improbable Midwest player
in the national charter movement

Chicago
1996

Chapter 8

If anyone ranked cities based on the muscularity of their unions,

and thus their likelihood to reject charter schools that are largely union-free, Chicago would surely rank near the top. Depending on the flow of politics and the day of the week in Chicago, at times it appears that Karen Lewis, the fiery president of the Chicago Teachers Union, commands more clout than Mayor Rahm Emanuel. Had she not fallen ill and called off her likely mayoral campaign, she might be sitting in Rahm's seat today.

So how to explain that in 1996 the Illinois legislature passed a reasonably liberal charter law, allowing 45 charter schools: 15 in Chicago, 15 in the suburbs and 15 in downstate communities? (In later years, those caps would get expanded.)

The answer begins with a political quirk: The charter law passed during a two-year period when Illinois Republicans, thanks to Newt Gingrich's political success at the time, held sway in both the

state House and Senate.

But if that were the only reason, the law would have been repealed by now. What actually happened during that two-year window was that Republicans were moderately interested in passing a charter law, but angry traditional Democrats (the rise of the "progressive" Democrats who dislike charters was years into the future) were intensely interested. They demanded better, less corrupt schools for their neighborhoods.

"There were a bunch of urban Democrats in Chicago upset at 15 years of Chicago schools being patronage shops," said Andrew Broy, president of the Illinois Network of Charter Schools. "The schools were a total mess – nepotism, cronyism." There's a reason former Education Secretary William Bennett once pronounced Chicago schools to be the "worst in the nation."

It's remarkable to hear a Secretary of Education get that up close and insulting. But in fact, Bennett didn't stop with the worst-in-the-nation comment. It would take a "man or woman of steel" to clean up Chicago's school system, he helpfully elaborated. "I'm not sure there's a system as bad as the Chicago system."

So that's how the charter law got passed, a huge bipartisan event that was totally missed by Michael Milkie, who at the time was a high school math teacher at Chicago's Wells Community Academy and soon to be married to Tonya Hernandez, a high school social studies teacher at Harper High School in West Englewood, one of Chicago's toughest neighborhoods.

Two of Tonya's teaching friends, Michelle Smith and Sarah Howard, however, were paying close attention to the new legislation

and started one of the first charters in Chicago. That got Mike and Tonya's attention. "They had to sit me down and explain it to me," Milkie told me. "I actually spent many hours with them trying to learn what they were doing. They were instrumental in getting Tonya and me to apply for our charter."

Milkie was looking for a change. He could see from his own teaching experience that new-generation schools were desperately needed in Chicago. "The appeal was to have charter freedoms such as control over budget, staffing and curriculum."

Tonya and Mike Milkie, founders of Noble Street in Chicago
— *courtesy of Noble Network of Charter Schools*

Staffing was key. The "steps and lanes" personnel system settled upon by unions and superintendents made no sense to Milkie. There were many good teachers at his Chicago high school, but there were also many who were unprofessional: constantly calling in sick, exhibiting a poor work ethic, never assigning homework. He wanted more freedom in choosing teachers and dismissing those who didn't work out.

And then there was the discipline issue. "The students [at Wells] were allowed to be disruptive, and a lot of students felt unsafe. We wanted a school where students felt safe, supported and accountable for their behavior."

For ideas on how to structure the first school, Milkie visited two Boston charters, Academy of the Pacific Rim (where Uncommon's

Doug Lemov served as principal) and City on a Hill. Milkie admired the "orderly and positive" student culture at the Pacific Rim school, but it was an odd thing at City on a Hill that really caught his attention. "I remember they wouldn't let the kids chew gum. And my reaction was: We can just tell them they can't chew gum? Where I taught, gum was everywhere."

Mike Milkie at a Noble graduation
— *courtesy of Noble Network of Charter Schools*

Banning gum at the new charter would become part of a culture rooted in discipline and orderliness. "Not having gum stuck everywhere was a sign that the big things were being attended to as well." Same with the school uniforms he saw – and adopted in the new school. "It sets the tone for discipline, to have people look

professional. And it addresses gang issues."

So the first charter opened in the fall of 1999, just a few months after he and Tonya married. That first school drew students from the mostly Latino West Town neighborhood and was named Noble Street, after its street address. From the first day, the school was oversubscribed, a pattern that would hold true during the following years of Noble's expansion. "There were definitely many families who wanted other options."

Today, despite the rapid expansion of Noble schools across Chicago (in 2016 Noble served 11,000 students on 17 campuses), Mike and Tonya maintain their original office at that first school, Room 207. "We never changed offices because we didn't want to lose touch with what we started our work for," Milkie told one interviewer.

In the fall of 1999, Noble Street's first year, Milkie taped a *60 Minutes* segment on KIPP charters and played it back for his Noble students. "I wanted them to see that they weren't the only kids in the country with strict dress codes, strict rules and high expectations. Up to that point, I think they believed they were."

From the beginning, Noble became the Midwest touchstone in the developing web of high-performing charter networks located mostly on the East and West coasts. Milkie, for example, was invited to the Walton-sponsored Denver gathering in 2004 (profiled earlier) where he heard Aspire's Don Shalvey advocate charter management organizations as the best vehicles for expanding. "That was a watershed moment for a lot of us in terms of, yeah, we can have an organization that operates multiple schools."

Noble used its $50,000 Walton grant to plan its expansion, a

plan Milkie followed precisely: two new campuses per year for four years in a row.

Soon, Noble and KIPP became close allies, with KIPP placing one of its principal internship programs in a Noble school. Other close partners were Achievement First founders Dacia Toll and Doug McCurry and Norman Atkins from Uncommon Schools.

Some examples of those interweaving relationships: Two of Noble's top administrators came from KIPP, and two former Noble school leaders now lead KIPP regions. Most interesting about Noble: One of Noble's strongest principals ever, Oliver Sicat, left Noble to take over USC Hybrid High School in Los Angeles, which is now a CMO, Ednovate, overseeing three schools (profiled later). That's how these high-performing networks spread.

"Noble demonstrates that you can take in kids well behind and in four structured years get students up to an ACT [score] that means they are prepared for college."

Despite Chicago becoming, in Broy's words, "an epicenter of charter opposition," the city continues to grow high-performing charters, most of which, like Noble, are modest-size networks born in Chicago and operating only in Chicago. Others include LEARN charters and the Chicago International charter schools.

What makes Noble unique, both within Chicago and nationally, is its focus on high schools. Most of the national charter networks start with elementary school, adding one grade at a time, fearing that

high school is too late to make up lost academic ground. “Noble,” said Broy, “demonstrates that you can take in kids well behind and in four structured years get students up to an ACT [score] that means they are prepared for college.”

In 2015, Noble won the $250,000 Broad Prize for Public Charter Schools. Noble’s schools – in which 95 percent of the students are African-American or Hispanic and 89 percent are low-income – ranked among the state’s top-performing school districts. Said Paul Pastorek, a former Louisiana state superintendent of education and prize board member: “Noble is clearly onto something, because they’ve been able to scale and sustain their academic achievement.”

Relay Graduate School of *Education*

Norman and Dave disrupt teacher education

New York City
2005

Chapter 9

The dozen newbie teachers in this third-floor classroom

in downtown Newark in the spring of 2016 seem to have at least a vague idea that the instructor leading them through graduate-level teaching practices is one of the most important, though probably least known, charter pioneers in the country.

Jamey Verrilli was Norman Atkins's partner in opening the very first North Star school in Newark in 1997. Verrilli was the classroom expert; Atkins was the big-picture guy who landed the building, did operations and dreamed up a future that includes the Uncommon Schools network.

On this day, Verrilli, who is tall with fast-fading gray hair, wears a green sweater vest in honor of St. Patrick's Day. This is a teacher residency program, one of many run by Relay Graduate School of Education, which operates eight campuses around the country enrolling 1,700 graduate students, a combination of charter

and traditional teachers.

Today's class is a mix. Many are fresh college graduates in their first year as residents in several charter schools around the city, holding down jobs as classroom assistants or assistant teachers and hoping to win actual teaching jobs the following year. And there are first-year teachers looking for both a master's degree and more classroom expertise.

That's what brings this group to Verrilli's classroom, and today they see the master modeling what they should be doing in their future classrooms: Verrilli moves quickly and authoritatively through the room. There's lots of intense eye contact. He cold-calls on students without signaling with his eyes who will be called on next. He has students read aloud. He has one student build on another's response. He

Relay Newark Dean Jamey Verrilli
— *photo by Richard Whitmire*

asks for a quick response on whether they agree with a student (one finger agree, two fingers disagree) to sample whether everyone is on track. The desks are arranged in clusters so he can move quickly between tables to conduct "aggressive monitoring" (one of the lessons for that day). His pacing is tight, timed to the second marked by buzzers and horn sounds and countdowns.

Best of all: Verrilli demonstrates the "prairie dog": an invaluable trait for any teacher to have. How does it work? When leaning over to assist a student, execute quick head pop-ups, prairie-dog-like, to survey the classroom for signs of trouble.

Watch this long enough and you could almost put Verrilli's instruction to music, which is pretty much what you see in the classroom of any top teacher. "Teaching is an intricate craft," Verrilli told me before the class started. "It takes multiple years to master. It's a craft built on specific strategies and techniques ... Certain teaching moves and strategies need to become like muscle memory, so what we're trying to do is build that muscle memory through this deliberate practice."

Listening to Verrilli that day was Olukemi Ojo, who goes by Kemi, who worked that year as a co-teacher at Newark Legacy Charter School. For the first time, Ojo said, she was learning how to actually teach, how to make sure all the students are learning, how to create a classroom culture that solves many discipline problems. "In college, it was more about how to create lesson plans. There was nothing about teaching you how to teach. If I didn't go to Relay, I'd be lost right now."

The origins of Relay go back to April 25, 2005, when two of

the most influential charter school leaders in the country, Norman Atkins of Uncommon Schools and Dave Levin of KIPP, decided to have a late-afternoon beer at the Olives bar (now the Irvington) in the W Hotel in New York City's Union Square. The conversation soon shifted to a project they had in mind, a graduate school of education that actually taught teachers how to run a successful classroom in urban schools, the kind of lessons that Levin first learned in the back of Harriet Ball's classroom in Houston and that Atkins learned while starting up North Star Academy in Newark.

At the time it was accepted wisdom that the traditional network of education schools was obsolete. One of President George W. Bush's education advisers once famously, and jokingly, suggested blowing them up. Arne Duncan, President Obama's Secretary of Education, came close to saying the same. His assessment: pretty much worthless.

Levin and Atkins had something radical in mind. Would it be possible to craft a new education college where progress was measured not in seat time but in demonstration of effective teaching techniques – lessons where actual student learning could be measured?

Based on that barroom chat, Levin and Atkins began their research. The concept was so radical it drew only puzzled looks from traditional leaders of teacher colleges. "The idea that you would get your certification based on actual student outcomes was alien," said Levin. "Nobody understood what we were trying to do."

Even the most prestigious colleges, such as Columbia's Teachers College, couldn't imagine it. "They were like, 'Huh, what are you talking about? That's not how a master's degree program

works.' And we were like, 'Well, why not? Why couldn't it work that way?' People thought we were crazy."

But there was more to the resistance. The heads of these teachers colleges knew exactly who they were dealing with – the nation's most famous charter leaders who had already proved they could disrupt traditional urban schooling. Given the heated rhetoric about just how awful their schools were, could this new graduate school disrupt their cozy corner of pleasant university life? Absolutely.

Dave Levin teaching at Relay Graduate School of Education
— courtesy of Relay Graduate School of Education

"I think there was real concern that this was going to be the end of their hegemony over teacher certification," said Levin.

But there was one notable exception, David Steiner, who was running Hunter College's teachers college and had heard about Atkins and Levin making the rounds. He embraced the two with open arms. "He basically said, 'You have to do this at Hunter,'" said Atkins. "He had previously written about teacher preparation being too mired in theory, and he wanted Hunter College to develop programs that were more practice-based."

The two quickly worked out a deal with Hunter and then set

Would it be possible to craft a new education college where progress was measured not in seat time but in demonstration of effective teaching techniques – lessons where actual student learning could be measured?

Norman Atkins teaching at Relay

— courtesy of Relay Graduate School of Education


RELAY/GSE
Norman Atkins

about fundraising. Soon, the question arose: What do we call this new school? Knowing how much they needed deep-pocket donors, the joke at the time was that the name would be Your Name Here Teacher Training Institute.

But the first big funder they found, hedge-fund investor Larry Robbins of Glenview Capital Management (a college friend of Mike Feinberg, Levin's co-founder at KIPP), who was willing to donate $10 million, declined the honor of having the school carry his name. So Levin's wife, Nikki, came up with the winning suggestion: Teacher U.

In May 2007, the fundraising continued at the famous annual Robin Hood Foundation gala in New York, which draws an impressively monied crowd to donate to causes helping the less well-off. Often, the solicitations take the form of: Who will bid the most for a dinner out with Cindy Crawford?

For Teacher U, however, the appeal at the fundraising dinner was more direct: Who will donate money to two famous charter leaders to start a new college of education? Answer: A lot. Quickly, contributions from 20 donors pushed the original $10 million donation to $33 million. Said Atkins: "I remember Dave looking at me and saying, 'Oh my gosh, $33 million. Now we have to make good on this, and one of us has to lead it.'"

The leadership role fell to Atkins mostly because, as he put it, Uncommon at the time was enjoying a very deep leadership bench. So in July 2008, Atkins shifted to chairman of Uncommon and plunged full time into Teacher U.

First up were the key hires. Atkins and Levin asked around for nominees of the most powerful teachers they could find and settled

on Mayme Hostetter, who had taught at a KIPP school in the Bronx, and Brent Maddin, described by Atkins as a "legendary" teacher in Louisiana. "He would teach, like, 70 kids after school at McDonald's because that's the only place they could go to get extra class time."

Said Atkins: "We had this idea that we would hire both of them and then ask them to go out for a beer together, which they did – and became the closest of friends. They thought it was uncanny that we brought them together because they agree on so many things."

The two deans started working together in February 2008 to design the program, which launched soon after. But two years later, Atkins and his team realized a change was necessary. As Atkins tells it, the Hunter faculty lacked the same buy-in that Steiner had, the

Mayme Hostetter, one of the two top teachers picked to launch Teacher U
— courtesy of Relay Graduate School of Education

program was oddly shoehorned into the traditional Hunter program in a way that didn't guarantee its long-term survival, and, most problematic, a lot of the tuition collected from Teacher U students went to the university.

"In order to build the program, we needed 100 percent on the dollar, not 10 cents," said Atkins. "Our goal was to develop a long-term innovative program where we could be confident about its future. It would be economically sustainable and tuition fees would pay for the expenses."

In 2010, Atkins applied to New York to open a traditional teachers college, and in 2011 he won that permission. "We had to change the name because they said we couldn't be a university because we didn't have a doctoral program, so we became Relay Graduate School of Education. The idea of Relay is a team of people handing you off. As a student, your success doesn't come from just one teacher. If you have a broken team of teachers for four years in a row, you are off the path. If you have four great teachers for four straight years, then, for example when a 7-year-old turns 11, that student is on the way to college."

Brent Maddin, picked with Mayme Hostetter to start Teacher U
— courtesy of Relay Graduate School of Education

Said Levin: "With Relay, we've probably had the biggest

transferable impact from charters to regular schools of anything that's been done. If you combine the teachers we've trained with the principals we've trained, I think hands down it's all a great outcome."

Back in the Newark classroom, also in the class that day, sitting at the same table as Ojo, was Gabryelle Brooks, a third-grade co-teacher at the North Star Academy Vailsburg Campus in Newark. What she learned in education classes at New Jersey's Kean University was fine, she said, but mostly about how to plan lessons. "At Relay, we learned skills that apply to our classroom right away. It's a big help to learn how to give students feedback and gather data all while managing the classroom."

As for the prairie dog trick: "It's definitely a big help to be able to pop up so they know you are always watching them."

Building *Excellent* Schools

BES: Who are these guys?

Boston
2003

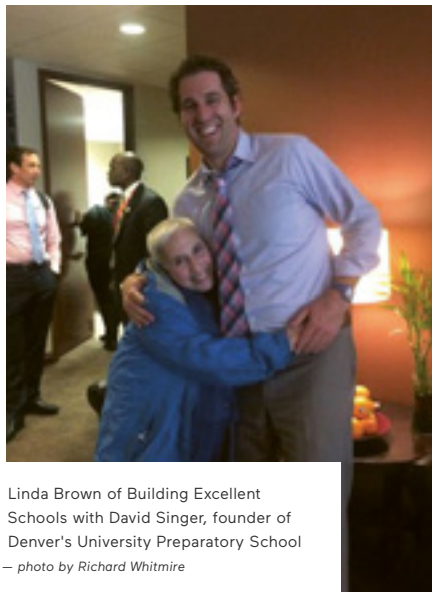
Chapter 10

It's a little embarrassing to admit this,

but it took me far too long to discover a Boston-based organization known as Building Excellent Schools (BES). As it turns out, I had visited some of its schools – such as the impressive Achievement Prep Network in Washington, D.C.'s high-poverty Eighth Ward, University Preparatory School in Denver and Re-Public Schools in Nashville – without ever realizing BES was the thread that tied them, and 100 other charters across 14 states, all together.

Finally, after hearing the BES name once again mentioned when I talked to the charter founders, I had to ask: Who are these guys?

That question landed me in Boston, where I discovered the BES story is as compelling as the schools it launches. It starts with its impressive and acerbic leader, Linda Brown, who once ran a private school in Boston that would take in small numbers of poor and



Linda Brown of Building Excellent Schools with David Singer, founder of Denver's University Preparatory School
– photo by Richard Whitmire

minority Boston kids, but never enough to satisfy what Brown saw as a crushing need. So she started looking for alternatives and eventually found hope in the new and generally unknown law allowing charter schools.

How that law passed in a deeply blue "progressive" and union-focused state such as Massachusetts remains a bit unclear to Brown. "I think it was very late at night, maybe a 1 a.m. session, and somebody went to the restroom and that's when they called the vote – because some very smart person saw that [opponent] go to the restroom."

Whatever the maneuver, the law passed – but few people understood the law. That's where Brown's role came about. She knew how to build out a private school, right? How much different can a charter be? That's how Building Excellent Schools got launched in 2003 – as a boot camp for promising charter operators.

There's a caveat here: Had that same lightbulb gone off in Nebraska or Maryland or Mississippi, the flicker would have faded. But Massachusetts emerged as an important early charter pioneer. For someone such as Brown, who was looking for models of how powerful charters might operate, she could take a short trip to Roxbury

Prep, for example, one of the nation's first high-performing charters, and meet with Evan Rudall and John King.

The important thing about Building Excellent Schools is its niche. The big networks – KIPP, IDEA, Uncommon, Green Dot, Achievement First and more – build from within. They identify and develop promising school leaders, pick out likely new locations and then test the waters, politically speaking, to gauge the likelihood of getting an approved charter. It's a winning formula, but it skips over another promising glide path: potential charter leaders who come from outside that pipeline – school entrepreneurs who could build networks every bit as successful as KIPP and Achievement First.

That's where BES steps in. This elite organization runs one of the most selective fellowship programs in the country, selecting fewer than two in 100 applicants. The final culling results in about a dozen fellows a year, who then visit top charter schools around the country. The idea: Pick and choose the best practices that fit your vision of a successful charter. That alone costs BES $250,000 per fellow. The following year the candidates settle on their city and write their charter application.

Many of them get startup grants of $250,000 either directly from BES or from the Walton Family Foundation, the biggest funder behind BES. During the launch year, BES fellows have a good track record of winning further startup money from the federal Charter School Program, enough to get the school started before the first student reimbursement money arrives from the state.

But how do you choose the two out of 100? I visited the BES headquarters in downtown Boston during a meeting of the BES

Network, a selection of the highest-performing BES schools. For this meeting, the charter leaders represented 18 schools in 15 cities. How did they get chosen?

Present at this meeting was David Singer, founder of Denver's University Preparatory School, a school I had visited months earlier one snowy day when Singer was out of town. At the time I was unaware of the BES connection, but after touring the school, and learning that Singer had taken the entire staff to observe Uncommon's North Star Academy, I knew that University Prep was one of the elite, with roots in the nation's best. As I later learned, those roots came from BES.

"You have kids from the grittiest parts of Newark loving life. It's emotional."

For Brown, Singer had been a slam-dunk pick. Tall, gregarious, brimming with confidence, Singer was already an experienced teacher in Denver. What appealed to Brown was his intensity, his competitiveness. "You have to be single-minded about this. I suggest that if they have a girlfriend or boyfriend they drop them right away." Thinking of having children? Postpone. "Of course I get disobeyed on these," said Brown, who delivers these sweeping edicts with a teasing twinkle in her eyes.

Almost immediately after getting chosen as a fellow, Singer contacted the Walton foundation hoping to line up a post-fellowship grant. "I told him, 'What were you thinking? Who do you think you are?'" But again, the twinkle. That's the kind of single-mindedness she values.

Singer's strongest memory of his fellowship was visiting North Star, especially witnessing the high-energy student drum calls during morning Community Circle. "You have kids from the grittiest parts of Newark loving life. It's emotional. Here's a group of kids getting a substantially different educational experience than any of their peers in the local setting. It highlights the inequity that exists in our urban core just about everywhere in our nation."

Today, University Prep students perform a near-mirror of the community circle Singer saw at North Star.

Another stop on the BES tour for Singer was Delaware's Prestige Academy, an all-boys school. Singer watched founder Jack Perry move through the school looking for ways to keep students on track. "I saw him take so many young men aside as he walked through the school, trying to get them back on point. A quick private conversation, a quick check in the classroom ... just those constant reminders that 'You can do this; you will do this. I love you, so let's go.'"

Today, that's how Singer tries to move around University Prep.

Also at the Boston meeting I attended was Shara Hegde, who entered Teach For America after graduating from Brown University. She taught in Miami for two years and then entered an education master's program at Stanford University. At Stanford, she formed her "big dream" and settled on BES as the best launch.

At her BES interview, Hegde had none of the brashness of David Singer, but she had an impressive "persistence," recalls Brown. "She said she wanted to be in Oakland, and I said 'No, San Jose.' She kept saying Oakland, I kept saying San Jose." She went to San Jose. "There, she made up her mind she was going to serve the Hispanic

That's where BES steps in. This elite organization runs one of the most selective fellowship programs in the country, selecting fewer than two in 100 applicants.

Linda Brown, founder of Building Excellent Schools
— courtesy of The 74

population in this part of San Jose, and she never looked back."

Her school, Cornerstone Academy Preparatory, has turned into one of the best charter schools in California. The foundations of her school grew out of her fellowship year at BES.

At Excel Academy during her fellowship, Hegde borrowed heavily from the "urgency" she saw in classroom transitions. To avoid wasting learning time, students were taught to move through the building in a tightly choreographed way, carrying exactly what they would need for the next class.

"At Cornerstone, you'll see kids lined up at each doorway with book boxes in their hands, their Chromebooks, all ready to go."

At North Star, Hegde was impressed by the joy in learning she saw. "In some cases, the kids were there for 12 hours. How do you make sure they continue to love being there?"

Those observations led to "go noodle" breaks at Cornerstone, where teachers set aside a couple of minutes for kids to shake and move as they shed their kid-wriggles. "They all have a good time and are smiling. It may take a minute or two from instruction, but it's worth it."

Also at the Boston meeting was Malka Borrego, founder of Equitas Academy in Los Angeles. When Brown met her for the interview, she wondered if she had the grit required to get the job done. "You're so quiet: Can you do this work?" Brown recalls asking her. But Brown had a feeling about Borrego. "There's a presence you can feel about some of these school leaders. Malka was very quiet but very smart about what she wanted."

During Borrego's fellowship year, it was the visit to Newark's North Star Academy, part of the Uncommon Schools network, that

most impressed her.

"I had taught elementary education, but I had never seen kindergarten done that way, and I didn't know you could hold kindergarten students to that expectation ... I saw that you could ask kindergartners to stand in straight lines ... I was really impressed with the idea that you can get kindergartners to read within three months, and by reading I mean decoding. Without maybe even a preschool experience, they were able to have kids starting picking up their own books and reading on an independent level."

From her observations at Boston's Brooke Charter Schools, Borrego came away with an emphasis on instruction and curriculum. "Their school leaders dive deep and think about assessment, about

Malka Borrego, founder of Equitas Academy in Los Angeles
— *photo by Richard Whitmire*

how to organize learning in a way I hadn't seen before."

Brooke, which has an easygoing student culture, offers a sharp contrast to North Star, which has the strict culture associated with "no excuses" schools. Weighing the two, Borrego came down in the middle for Equitas.

Perhaps the most notable recruit at BES was Shantelle Wright, founder of Washington, D.C.'s Achievement Prep. Wright had never heard of BES until she was handed a brochure. Her reaction: You mean they pay you to do what I desperately want to do? Immediately, she threw herself into the application, finished it at 5 p.m. and pushed "send" while muttering a hopeful prayer.

Brown looked it over as soon as it arrived, and she was floored. The essay was 13 pages long, single-spaced. There was no white space, not even between the paragraphs.

"This essay was on fire," said Brown. "She talked about how the vast black/white school achievement gap is not only a black person's problem; this is also a white person's problem: Why can't we have decent schools east of the Anacostia [the poorest neighborhoods in the district]?"

The tone was more analytical than polemical, but the passion was clear. Brown wanted a meeting.

At 7 a.m. the next morning, Brown phoned Wright at home, waking her up: When can you be here?

Wright: When do you want me?

Brown: Can you be on the next shuttle to Boston?

Wright made the 9 a.m. shuttle and sat down with Brown for a long talk. At the end of the talk, she was offered a fellowship. That's

how Brown rolls. Today, Wright sits on BES's board of directors.

BES is not the only organization that launches high-achieving charters. The Charter Network Accelerator, which is run by three large charter groups, helps small charter groups grow large. And city-specific groups such as New Schools for New Orleans have helped launch charters.

But for aspiring charter operators who didn't emerge from the larger charter management organizations, BES is by far the best launcher. A look at the first 79 schools emerging from BES reveals that six ended up shuttered and about 50 meet the threshold of a high-performing school, one where students receive a year and a half of learning for every year spent in school.

The day I visited Boston, the leaders of 18 BES schools were convening with charter entrepreneurs from outside the network. The day's lesson: Here's how to take your one or two schools and turn it up a notch.

The first morning session featured Bill Kurtz, founder of Denver's highly successful Denver School of Science and Technology network. Only two weeks before this gathering, DSST won approval to open eight more schools, putting it on track to operate 22 schools in Denver by the school year 2024-25. The expansion would make DSST the largest charter network in Denver and in Colorado – and, at 10,500 students, larger than most of the state's school districts. Denver Public Schools currently enroll just under 90,000 students.

To the BES charter operators at this meeting, who run anywhere from one to a handful of schools, that's a near unimaginable leap. But that's why Kurtz was here, to tell them how to make that

happen.

The key Kurtz wisdom, repeated several times: Whatever time you now spend to develop your management team, double it. You could see heads turning in the room, puzzled smiles exchanged. How in the world could we do that when we spend most of our day putting out fires?

But Kurtz was firm: Make it happen, or down the road you will pay a price. The management team you start a couple of schools with, he cautioned, may not be the management team you need to become the force that DSST has become in Denver.

Kurtz's other tip came when DSST realized: We have made more missteps than we can keep track of, and yet as a network of schools, we're very successful. How can that happen?

Kurtz's answer: Mistakes can be overcome as long as you always keep two values at the forefront. First, be clear about the values of your network. If your people culture gets broken, it doesn't really matter how good a job you do rolling out a great curriculum. You will still fail. Second, be very clear about performance expectations. Principals and teachers have to know the bar that needs reaching, and their passion about reaching that bar has to be enduring.

Other than that, he advised, take risks and don't worry about mistakes.

Around the room, all day long, I felt wave after wave of "aha"-moments. This is why they came; this is why launching pads such as BES make such a difference. This is why charters that intensely copy one another's success are revealing the secret sauce behind what it takes to successfully educate low-income, minority students.

Philanthropists as Education *Activists*

Investing in scale

San Antonio
2009

Chapter 11

I first met Victoria Rico long after she suddenly, and unexpectedly,

became a major player as a local school reformer. At first glance, she didn't quite seem the part: black power suit, huge black SUV. Seemed more Dallas than San Antonio.

But despite her Harvard degree (tempered by a law degree from the University of Texas), she quickly proved to be pure San Antonio. Her grandfather was Leroy Denman Jr., who also earned a UT law degree and later served as attorney for the famed King Ranch, one of the world's largest ranches. And her father is a prominent trial attorney in San Antonio.

Rico's sudden plunge into school politics started in 2009 after she was invited onto the board of the small but respected Brackenridge Foundation, named after the late George Brackenridge, a prominent local banker who became a philanthropist and watched out for the less privileged of San Antonio.

The Brackenridge Foundation could give away only roughly $1 million per year, most of those grants piecemealed out to small education-related programs such as summer camps, field trips and after-school programs. Invited to join the foundation as a trustee, Rico surveyed the education scene in San Antonio and was dismayed by what she saw: thousands of students, most of them poor and minority, stuck in schools that were little more than dropout factories.

Victoria Rico of the Brackenridge Foundation
— *courtesy of The 74*

Suddenly, the Brackenridge efforts seemed very small. What's the point of funding summer camps amid all this educational inequity? Everything changed for Rico after she visited a KIPP charter school in San Antonio. "I thought that school was amazing. Then I

saw *Waiting for* "*Superman*" and realized there were more like KIPP out there."

Rico's proposal: Form a team of San Antonio foundations, anchored by the far larger Ewing Halsell Foundation (her grandfather was a former board chair there), to fund a school-choice advocacy group (which became Choose to Succeed) that would handle the blocking-and-tackling necessary to greatly expand the number of top charters in San Antonio.

It worked: Existing San Antonio charter groups, including KIPP, expanded, while other charter groups – IDEA Public Schools, BASIS Charter Schools, Great Hearts Academies and Carpe Diem Innovative Schools – were lured into San Antonio. What makes the San Antonio plan especially intriguing is its insistence on opening charters that appeal to middle-class families. Hence, the presence of BASIS and Great Hearts, which each have a track record of appealing to middle-class parents. The reasoning of the San Antonio planners: Suburban schools aren't what they are cracked up to be, and engaging middle-class parents means both providing better options for suburban parents and tapping into a potent political force to work for opening up more charters.

Said Rico: "If we have middle-class moms advocating for the same thing that low-income Latino moms are advocating for, it makes the movement grow faster."

What's playing out in San Antonio, with smaller local foundations drawing in top charters to quickly expand quality school options, is mostly unobserved nationally, where the focus is more on the big foundations, such as the Walton Family Foundation or Charter

School Growth Fund, helping charters. Those are the foundations taking the political heat from teachers unions and the progressive left for "billionaires" trying to "privatize" public education. But to miss stories such as San Antonio would mean missing the most creative pockets of the philanthropic movement to give poor and minority parents school choices they have lacked.

The national context

Charter critics love to lash out at billionaires who fund charter schools. It's an effective tactic. Who doesn't instinctively dislike billionaires, especially hedge funders, and who wants to see the classic neighborhood schools disappear? The teachers unions wisely sniffed out opportunities to discourage these investments, quietly funding groups such as the Hedge Clippers to publicly attack current and potential donors.

What goes unmentioned in the attacks, of course, is that there's a reason so many philanthropists brave the critics and put their money into charters: They believe that education is the key to a more equitable society, and they've lost faith in the ability of those beloved neighborhood schools to deliver, at least in high-poverty neighborhoods.

"When you get discouraged and don't think anything can happen, visit KIPP, Green Dot Public Schools, Summit, Rocketship, High Tech High to get inspired," Bill Gates said in a 2016 speech. Gates

was especially impressed by California-based Summit Public Schools. "I was amazed in my last visit to Summit," he said, noting that Summit "gave students some degree of choice and an idea what they have to get done. The idea of agency … creates a very different relationship between the student and teacher."

But couldn't those same philanthropists help rescue those neighborhood schools? Gates has done that, with very mixed results. Many philanthropists, though, take a charter-only strategy. Why? I have yet to meet a philanthropist who was unaware of the 1993 Annenberg Challenge gifts: $500 million to public schools over five years, gifts that went nowhere.

Philanthropists are willing to throw a little good money after bad. But $500 million?

As Mark Zuckerberg and Priscilla Chan would discover years later in Newark, putting multi millions into the traditional school district will get you some gains; putting far less into high-performing charter schools in Newark, such as KIPP and Uncommon, produces considerable impact.

That's the appeal of charter schools: If you choose the right school operators, a donation will "buy" what donors like to call "high quality" seats: a seat in a classroom where students who lagged far behind in their traditional schools are making it up, usually a grade and a half at a time.

There's every incentive to donate only to high-performing charters, which, ironically, may give philanthropists a bigger role in blocking bad charters than authorizers, some of whom approve questionable charters and then keep them open far too long as they

struggle.

And with charters, the donor role is key. Unlike traditional schools where taxpayers foot the bill for new schools, charters must find their own startup money. Those high-quality seats don't come cheap: A 500-student charter elementary school may cost one-fifth to one-eighth what it would take to build a traditional school, but that still doesn't make it inexpensive.

In California a new charter elementary school costs between $15,000 and $20,000 a seat; translation: between $7.5 million and $10 million. The same per-seat cost for a charter middle or high school will run between $20,000 and $25,000.

The most expensive charters to underwrite are those that prefer to build one grade at a time, thus postponing the full per pupil revenue from the state. And that describes how most top operators prefer to expand. It's the safest way to keep that special culture tightly sealed, grade to grade.

When adding up the dollars needed to launch a new charter, you have to think well beyond brick, mortar, teachers and principals. What do you do when the school is about to launch and the local fire inspector finds fault – for no apparent reason?

"In our city," one funder told me, "fire inspectors are a strange breed of creature who seem to devote their lives to stopping charters from opening." The solution: Hire a fixer who knows somebody who knows somebody in the City Hall fire inspector's shop and have them explain, in the nicest of terms, that charter schools tend to be, well, pretty decent, law-abiding citizens. No threat.

No bribes got exchanged; just a dose of intense "social

intercourse," and suddenly the fire inspection red flags got turned into green flags. Fixers – let's call them by their real name, lobbyists – don't come cheap, and charter founders can't fund them using 501(c)(3) money. But they get stuff done.

Same goes for key state legislators who get jittery after the fifth school superintendent comes to complain about charters "taking" their students. In many states, the school superintendents, often the biggest employers in town, are Soviet-style hiring gods and goddesses. Competition from charters is not their preferred business model. Hard to blame them.

This, too, takes countering, and not just visits from earnest would-be charter school parents, many of whom long ago got gerrymandered into all-minority districts where the political leaders often lack clout, which makes the parents' voices count less. Again, this takes lobbyists.

When it comes to the long list of local and statehouse politicians who can hold up charters merely by raising a pinkie during a closed-door committee hearing, you can pretty much double and triple that lobbying budget.

Now let's talk about the more traditional charter startup expenses: location, location, location. And all locations, even in neighborhoods that might seem dicey to suburbanites, are expensive, at least in cities such as L.A., Boston, D.C. and New York.

But can't charters lease unused classrooms or entire buildings not used by school districts? In theory, yes, but that's often problematic. California's Proposition 39, for example, forces school districts to turn over unused school space to charters. But the operative word

there is "forced." It doesn't always happen, prompting lawsuits. Plus, the unused facilities often prove to be too expensive to rehabilitate.

Here's where the philanthropy money is huge. The importance of the facility money goes far beyond building that first school, especially for charter operators expected to expand quickly. "It means they can spend less time worrying about building the next school and more time worrying about running the schools," said one major funder. Just like in the credit card ad, that falls into the "priceless" category.

Aside from real estate, the biggest challenge in launching new charters is finding, training and supporting great school leaders, along with the platoons of assistant principals that accompany them. KIPP is probably the best charter network at talent development. To prepare new principals, KIPP puts them through a one-year fellowship program, at a cost of $130,000, to recruit, select and train candidates who will be opening a new KIPP school. For a lower cost, KIPP also provides on-the-job training for teachers and assistant principals interested in becoming principals. That adds up – quickly.

Bottom line: It's not cheap but still attractive to foundation leaders who believe education is the key change ingredient. There's a very long list of philanthropies engaged in education. The big national players start with the Walton Family Foundation (profiled later), which has been a key charter funder for years and plans to continue: Walton recently announced it would invest $1 billion in charters over the next five years. NewSchools Venture Fund is another big national player, as are the Charter School Growth Fund, the Doris & Donald Fisher Fund and the Bill & Melinda Gates Foundation, where Don

Shalvey now oversees grants to encourage charter/district compacts. Often help comes in the form of creative financing tools that allow top charters to expand their networks with money borrowed at favorable rates.

Coast to coast

In New York City, the Robin Hood Foundation has been an important player. Norman Atkins of Uncommon Schools was a co-founder of the foundation, joining his senior-year roommate from Brown University, David Saltzman, who now serves as Robin Hood's executive director. After Atkins left to pursue his school startup dreams, he called Saltzman to say: "There's this guy in the South Bronx, his name is Dave Levin. You need to go check this out."

And so Saltzman did. "I went up there and had this sort of moment, kind of like what [record producer] Jon Landau had when he first saw Bruce Springsteen and said to himself, 'This is the future of rock and roll.'" Soon after that visit, Robin Hood became a key supporter of Levin's expansion of KIPP schools there.

Robin Hood and charters may be one of the most intriguing charter philanthropy stories in the country, partly because no city in the country has so many financiers willing to invest so much money in education causes they think will produce results. Since 1999, the foundation has put about $10 million a year into high performing charters.

Just one quick taste of a Robin Hood story: In August 2006, Saltzman took his sons out for ice cream on Long Island and ran into a friend who was having ice cream with famed architect Robert A.M. Stern. After introductions, Stern quipped: "So, I guess you're going to ask me for a pro bono project," to which Saltzman replied, "Why, thank you for the opportunity to ask."

The result of that ice cream encounter: a conversion of a broken-down Bedford-Stuyvesant former school building that over the years had transitioned from a Yeshiva school that was torched in a mysterious fire to a den of iniquity that was home to everything from a dog-fighting arena to a gathering spot for prostitutes. Today, it houses the K-8 Excellence Boys Charter School, part of the Uncommon network, where students enjoy the most stunning school I have ever visited – a conversion greatly financed by Paul Tudor Jones, a famous hedge funder and a Robin Hood founder.

In New York, the ethos of sharing among the top charter leaders is "less codified than organic," said Saltzman. "It's a constant gathering of people who share similar missions coming together who realize that nothing is proprietary. It's the culture. It's not discussed, just understood."

In the Midwest, the Ewing Marion Kauffman Foundation (where I am now a fellow) plays the key role in reshaping schools in Kansas City. In launching the high-performing Kauffman School, the foundation took a unique, personal stake in the charter school issue. The Houston-based Laura and John Arnold Foundation plays a national role in education reform.

In New York City, Eva Moskowitz and her Success Academy

schools are a fundraising powerhouse unto themselves. In April 2016, I was a guest at Success's annual fundraiser, where city philanthropists, most of them from New York's finance world, contributed $10 million. Then, at the end of the evening, Julian Robertson of Tiger Management pledged $25 million through his foundation. Evening take: $35 million.

Before

After

Uncommon's Excellence Boys Charter School in Bedford-Stuyvesant, Brooklyn, before and after its renovation by famed architect Robert A.M. Stern

— courtesy of Uncommon Schools

In California, Netflix's Reed Hastings continues to play a key role in growing top charters, especially with the formation of a new $100 million school investment fund. In Los Angeles, the Eli & Edythe Broad Foundation persists as the main philanthropy player in encouraging the growth of top charters.

California is home to some of the nation's most creative education philanthropies, with both Facebook's Mark Zuckerberg and his wife, Priscilla Chan, and Laurene Powell Jobs, the widow of (the famously pro-school-choice) Steve Jobs, who founded the Emerson Collective, operating LLCs rather than the more traditional nonprofit foundations. That means they can invest in companies, hand out grants, lobby and make political donations.

"The beauty of having an LLC in today's world is, number one, you have the ability to act and react as nimbly as need be to create change, and you have the ability to invest politically, in the for-profit sector and the nonprofit sector simultaneously," Powell Jobs told *The New York Times*. "And the reality is, we are now seeing a blurring of the lines between the sectors in a way that was not even discussed 10 years ago. The way that we are going to solve social problems is by working with multiple different types of investing."

As an example, Powell Jobs and Zuckerberg recently teamed up to invest in Ellevation, a Boston-based company that creates online instructional tools aimed at helping school districts assist English-language learners.

These are philanthropists with "scale with quality" etched into their DNA. Think Bill Gates with Microsoft, Eli Broad with insurance and home construction, the Fisher family with Gap and Mark

Zuckerberg with Facebook. If it was possible for them to grow their companies while maintaining quality, why can't the same happen with charter schools?

The Walton Family Foundation

Everyone agrees that the Walton Family Foundation is the heavy hitter of charter philanthropists, plowing roughly $165 million a year into the school-choice movement. Less is known about why the family settled on that campaign.

Answering that question starts with the late John Walton, son of fabled Walmart founder Sam Walton. John Walton, who never entered the family business, dropped out of college to join the Army (and won a Silver Star for his combat service in Vietnam). He was always looking for ways to "give back," said his niece Carrie Walton Penner, who today is an education advocate on the family foundation.

Spurred by 1983's famous "A Nation at Risk" report, John settled on education as the pathway to open up the American dream to others. "John started educating himself and educating us alongside," said Carrie. "Our concerns were the big national areas where we could potentially have an impact."

The format for debating family policy was the annual meeting at Sam's house in Bentonville, Arkansas, a Fay Jones–designed home not far from the heart of Bentonville. "It was casual back then," recalls Carrie. "We would sit around on the sofas and the floor and talk

“Our concerns were the big national areas where we could potentially have an impact.”

Carrie Walton Penner chats with students

— courtesy of Walton Family Foundation


is for cat
is for dinosaur
2016
Months
Numbers
Emotions
Blue
Orange

about business and philanthropy." These were family-only meetings. "It would have been my grandparents, their four children and three spouses and grandkids."

In March 1992, then-Education Secretary Lamar Alexander accepted an invitation from John to speak at a Walton family meeting, mostly to talk about the department's America 2000 program, which was cast as a nine-year effort to revitalize schools.

The controversial parts of Alexander's program: voluntary national exams and vouchers. Said Alexander to the press at the time: The traditional school system, in which children are assigned schools, is "coercive" and contradicts the American right to choose.

Alexander made an impression on the Walton family, leading them to think national. The family never looked back.

John, who was then living in San Diego, had a less than satisfactory experience as a donor working with the traditional schools there. And he had befriended Howard Fuller, former superintendent of Milwaukee Public Schools, who was a school-choice advocate even before he took the job as superintendent. To them, pursuing school choice made sense. Together, Walton and Fuller explored choice options, first vouchers and later charter schools.

Fuller first met Walton while they were serving together at a school-reform advocacy organization. Fuller recalls asking Walton why he got so involved in education issues. "He told me the poor people in this country are getting screwed and I'm in a position to do something about it." The choice movement appealed to Walton, said Fuller, because it "empowered" low-income and working-class families. Said Carrie: "What John saw as unacceptable was that low

income families didn't have the financial means to move to a different district or pay for private school. He believed every family should have those choices."

And there were other reasons, said Fuller: "He also had views about the value of competition and the inherent difficulty of changing bureaucracies from within, without any pressure coming from the outside."

"He told me the poor people in this country are getting screwed and I'm in a position to do something about it."

The Walton charter grants started in 1997 and went initially to four schools: three in Boston, one in Illinois. The next year, 94 charter schools were funded. By 1999, the foundation backed 113 charters. The typical grant was $250,000 for startup costs, thus helping with the biggest problem for any new charter, which receives no funding until the first students arrive.

In 2002, the foundation invested in NewSchools Venture Fund. Then in 2005, John Walton and Gap co-founder Don Fisher collaborated to launch the Charter School Growth Fund, a group with a focused goal: Scale with quality.

In addition to funding charter startups, Walton also supports groups such as the National Alliance for Public Charter Schools, the National Association of Charter School Authorizers, Families for Excellent Schools and Democrats for Education Reform. Other beneficiaries: the Center for Research on Educational Outcomes (CREDO)

John Walton on a school visit, 2005
— courtesy of Walton Family Foundation

at Stanford University and the University of Washington's Center for Reinventing Public Education (CRPE).

Over the years the grants became far more sophisticated, and in 2015 Walton zeroed in on certain cities where the conditions for charter growth seemed ripe. The chosen cities: Atlanta, Boston, Camden, Denver, Houston, Indianapolis, Los Angeles, Memphis, New Orleans, New York, Oakland, San Antonio and Washington, D.C.

Explained Marc Sternberg, who oversees Walton's education programs: "The idea was to concentrate where the policy environment was good. This work is hard even in the best of circumstances, so we need to concentrate the work in the policy environments that are most conducive to quality at scale."

That meant dropping some cities, such as Milwaukee, Phoenix, Chicago and Albany. In Milwaukee, for example, attempts to bring in top charters to jump-start a moribund school-choice movement have proved difficult. This is something I saw repeatedly on the ground when I followed Rocketship charters as they opened their first charter there (more on that story later).

The news hit hard in Milwaukee. "Fifteen years ago, Milwaukee was called by some 'ground zero' for school reform. Now, you rarely see national attention to Milwaukee education, at least not for positive reasons," wrote local education commentator Alan Borsuk. "The Walton decision underscores that."

What happened in Milwaukee? My sense from reporting the Rocketship book: The voucher program there has been popular but has failed to transform the district, thus dulling families' appetites for school innovation while simultaneously sharpening hostility from unions and traditional educators. Charter innovators find little fertile ground.

Although Milwaukee school reformers were devastated, the shift by Walton matched a shift by all the major charter funders to focus only on schools that can scale with quality and cities that will allow that to happen. What's interesting about the entire portfolio of Walton grants, though, is the willingness to fund fresh charters, not just CMO replications.

Their reasoning: It's a simple math problem. Based on the need for "high quality" school seats – possibly as many as 10 million – between a third and a half will have to come from new providers. Existing high-performing CMOs can't meet that goal. Thus the need to

develop new KIPPs, new Uncommons, new Aspires.

In the history of how the top performers developed, Walton plays a starring role, which in turn gives the family a starring villain's role (as seen in the "Cashing In on Kids" paper from the American Federation of Teachers) with the charter critics who assume the family embraces non-union charters because Walmart itself is non-union. That story line is a staple in progressive left publications such as Salon. But is the Walton story really that simple? It doesn't appear so.

Back to San Antonio

In 2015, I returned to San Antonio to check on how those ambitious plans were working out. Clearly, there were setbacks. Rocketship charters, which had run into problems documented in my book, had withdrawn their plans to expand in San Antonio.

Another bump was that the $50,000 starting salaries for teachers in San Antonio proved to be a real challenge to the charters: How do you recruit and retain teachers in that pricey environment?

Naturally, there was pushback from the many school districts in the area, including a coordinated "Go Public" city-wide campaign to encourage parents to stick with traditional public schools. (The campaign never quite explained why charters did not qualify as "public" schools.)

But San Antonio is not New York or Los Angeles. Soon, both sides just hunkered down to labor away at their respective tasks. It

was clear that the one action that could truly shut down the charter expansion – creating successful traditional schools for low-income Latinos at scale – was not in the offing anytime soon. More interesting in the original pushback, however, is the recent attitude reversal at San Antonio Independent School District, where a new superintendent decided to offer charters free space in district buildings (with some stiff conditions that may prove unpalatable) as a way to fight declining enrollment and spark innovation. Clearly, the charters are having an impact.

Most of the original charter master plan seemed to be playing out as intended, especially the thrust into middle-class neighborhoods.

Visits to both BASIS and Great Hearts schools made it obvious that they fit into an unexpected sweet spot for charters: middle-class parents desperate for a curriculum that would challenge their bored sons and daughters but who are unable or unwilling to pay private school tuitions. For those parents, schools such as BASIS may lack lush soccer fields, but the academics equal or surpass those of many private schools, all at the right price: free.

Anyone expecting these schools to be white enclaves will be surprised. At the two BASIS schools, 36 percent of the students are white, 33 percent Hispanic, and 24 percent Asian/Pacific Islander. The schools appear to be especially appealing to South Asian families.

At Great Hearts, 43 percent of the students are white, and a few are Asian. This school attracts a great many middle-class Latinos, including families who want their children to be part of the next generation of San Antonio leadership. The Great Hearts Monte Vista school is half Hispanic and 22 percent low-income.

And so the growth continues, growth given a tailwind with a decision by the Walton Family Foundation to make San Antonio one of its priority cities. In 2011, there were a mere 700 available charter school seats. By 2016, there were 9,000 seats offered by five different charter operators. The goal: 40,000 to 45,000 seats by 2025.

It all started with philanthropy. Pledged to date: $21.2 million from Halsell; $8.3 million from Brackenridge; $3 million from the Walton Family Foundation; $2.25 million from the Michael & Susan Dell Foundation and $1 million from the Mays Family Foundation.

Is it making a difference? "The portfolio is young and part of a long-term investment strategy," said Christi Martin of Choose to Succeed. But the early academic results are promising, she said, with more low-income students attending high-performing schools.

By 2025, she said, the charter enrollment there will be equivalent to the fourth largest school district in the county. "Imagine a predominantly low-income school district of significant size in which every student graduates, prepared not only to enroll, but also persist and succeed, in college." That, Martin said, would position San Antonio as "one of the nation's best-educated cities."

Should that happen, it would be the result of a school-reform newbie, Victoria Rico, asking herself: Wait, can't we do something about this problem?

Districts and Charters, Working *Together*

Collaborators, compacters, transformers

New York City
February, 2016

Chapter 12

On a blustery New York day in February 2016,

I visited two schools in the high-poverty Brownsville part of Brooklyn, one a charter and the other a traditional city school, that together were practicing what many in Mayor de Blasio's progressive-left administration might consider blasphemy: collaborating. After all, the mayor is famously anti-charter, and his schools chief has been seen handing out public hugs to the teachers union president, who despises charters.

And yet it was happening, with Uncommon Schools, one of the country's highest-performing charter groups, taking the role as the collaborator. This role as a collaborator – or part of a charter/district compact, or part of a "portfolio" of schools offered within traditional districts, or transforming an existing school, as I will later describe in Newark – appears to be the future of these high-performing charters.

But only if charter and district leaders are willing to play ball.

Undoubtedly, top charter CMOs such as KIPP and Uncommon will continue to grow on their own. But to reach far more students and overcome the toxic political divide over charter schools, the expansion into third-way partnerships seems inevitable.

Trying to understand how a collaboration works brought me to New York City. My first impression: Despite its success, the collaboration appears to be one of the best-kept secrets in the city, possibly because of the political awkwardness of the situation. Aren't these two sides supposed to be warring? The New York *Daily News* op-ed I wrote after this visit carried the headline: "Dogs and Cats, Working Together."

The collaborators I visited: Brooklyn Landmark Elementary School and its partner, Uncommon's Leadership Prep Ocean Hill charter. Both schools are located in Brownsville, a neighborhood that seems very far from the famously gentrified Brooklyn neighborhoods closer to Manhattan.

Brooklyn Landmark is a three-year-old school led by Robin Williams, a principal determined to build a successful school in a neighborhood where that's a rarity.

Williams and her boss, District 23 Superintendent Mauriciere de Govia, settled on a promising strategy: joining a charter/district collaboration project sparked by state funding. Leadership Prep also serves Brownsville students and has long been an academic standout: 100 percent of its fourth-graders scored proficient or advanced in math, compared with 11 percent of District 23 students.

What was Leadership Prep doing that other schools weren't?

That's what Williams and de Govia were determined to discover. De Govia knew the answers offered by the unions and many of her fellow superintendents: Charters "cheat" by accepting better students, pushing out bad students and overwhelming students with unhealthy test prep.

De Govia wasn't buying it. As is evident from her tattoos and formidable presence ("I'm not your mother's superintendent"), she's not one to pay much attention to anyone accusing her of consorting with the enemy. She has her reasons.

"In District 23, failure has long been an accepted part of the puzzle for the kids in Brownsville. When people hear Brownsville, they don't think of kids who are Harvard-bound or Princeton-bound. I took this job because I think every child can be." Uncommon schools, said de Govia, offer her a pathway to make that happen. "They not only have the tools, but they also have the evidence. You can't ignore that." Her schools, in turn, have something to offer Uncommon, especially in educating English-language learners.

District 23 Superintendent Mauriciere de Govia
— *photo by Richard Whitmire*

Williams was in her second year at Landmark when she heard about the collaboration. "I let my

teachers take the lead. They read about it and said, 'Hmmm, this sounds really interesting. We want to know the secrets. We want to know the ins and outs. We want to see how Uncommon does it.'"

Williams and her teachers plunged into the collaboration, which involved multiple school exchanges. It also meant that Williams attended summer sessions at the Relay Graduate School of Education (profiled in Chapter 9), a unique program that passes along the lessons learned from top charters and other successful schools.

Every day for two weeks in 2014, Williams was exposed to top charter leaders, many of whom have published books about their experiences. "It was hard work, but it was an amazing experience ... You know, there's a difference between reading a book and having the author actually present the information to you." (She specifically cited Paul Bambrick-Santoyo from Uncommon, author of *Driven by Data*.)

Soon, Landmark began looking and feeling like an Uncommon charter. Williams and her staff wrote a school song and a school chant. The students got to choose a mascot (Percy the Penguin, chosen to symbolize everyone "weathering the storm" of school changes there).

They also organized community circles – a signature feature at any Uncommon school, where students get loudly celebrated for academic achievements and those chants and songs get shouted out. Classes with perfect attendance and uniforms claim Percy for the week.

Williams flipped her classroom observations, asking teachers to take the lead in talking about what she observed. Teachers also got handed the task of crunching their own classroom data and then

explaining successes and shortcomings to others.

"It used to be that I would present the data. Now, I'm more like a facilitator. They're coming in and saying, 'Here's my data, here are the gaps, here are the trends, here is what my class needs to do, and here are my instructional next steps.'"

Wielding data is a big part of the Uncommon playbook. "We collect data daily to change our instruction either that same afternoon or the next day," said Rachel King, principal at Leadership Prep.

After visiting both schools, I found most noticeable the adoption of instructional practices Uncommon has fine-tuned for years. Classrooms in both schools have large posters laying out Uncommon's exacting guided reading program.

The collaboration investment has paid off: Last year's state test scores for District 23 put Landmark at the top – by 20 percentage points in math, and well ahead in literacy. And that's for one year. It's just a beginning; it will take several years to truly evaluate the program. But it's a promising start.

Does that make Landmark's test scores as high as those at Leadership Prep? Not yet.

Visiting both schools on the same day was revealing. Getting teachers to move through their lessons at Uncommon's quick-twitch pace is a process; Landmark is perhaps halfway there. But even halfway makes Landmark soar above other schools in District 23. There are multiple schools involved in this collaboration. How's it going? Based on videotaped responses from teachers and principals, it looks promising.

This is hardly the only collaboration underway across the

country, and this is not the only model for high-performing charters and traditional schools to work together. There are other flavors, including compacts and transformation.

In addition, cities such as Washington, D.C., are discovering that running side-by-side systems, with charters enrolling nearly as many students as the traditional district, can stimulate both sides to do better – but only if the charter authorizers have forced out most of the low-performing charters, as happened in Washington, D.C. In Kansas City, by contrast, there are so many average or low-performing charters that the 50-50 split there seems to have little impact.

In truth, this arrangement may be the best hope for many urban districts. The urban school districts I've seen that are making good progress without taking on charters as partners – California's Long Beach, North Carolina's Charlotte and Florida's Tampa – enjoy a huge advantage: large pockets of solid middle-class neighborhoods that school chiefs can draw upon for extra resources. Short of that, the evidence points to charter/district collaborations (or side-by-side competition as seen in Washington) as the future – but only if the charters fall within the top 20 percent, the charters that are profiled in *The Founders*.

Former Spring Branch Superintendent Duncan Klussmann
— courtesy of Spring Branch Schools

That's the difference between Washington, D.C., and Kansas City: each city has roughly the same percentage of students in charters, but only Washington is getting a huge boost from that – a reflection of the far better charters in the District of Columbia.

My personal favorite compact model remains the Spring Branch experiment in Houston, which I profiled in my book about Rocketship charters. Who has even heard of Spring Branch? It's an odd duck of a place, a "district," not even a city, tucked into the Houston sprawl. But its school district is independent, and its size, about 35,000 students, including many low-income Hispanics, makes Spring Branch an ideal proving ground; it's about the same size as hundreds of other school districts and is facing similar demographic challenges.

What makes Spring Branch unique is its (recently retired) superintendent, Duncan Klussmann, who several years ago did something traditional school superintendents rarely do: he visited a nearby high-performing charter school, YES Prep. He met with founder Chris Barbic, toured a school and liked what he saw. "I was really impressed with the culture, the environment, the interaction with the kids. As I tell people, I often gauge things by whether my own three kids are missing out on something by not being part of a really good program."

About a year later, Klussmann accepted an offer to visit a KIPP school. Again, he liked what he saw. Those two visits launched a series of discussions about how Klussmann could fold both charter school groups into his system. That may sound like a logical response, but it's an action you rarely see superintendents take.

Klussmann wasn't just looking for great charter schools; the district had already started two successful charters. He was looking for something unique, a way to marry KIPP and YES Prep with his own schools while preserving the best of what neighborhood schools are all about, giving Spring Branch students a neighborhood-connected education offering everything from challenging academics to sports.

What's interesting about these charter/district interactions is how many are flourishing under the radar.

In the fall of 2015, I returned to Spring Branch to see how the high school experiment was playing out. YES Prep had just inducted its first freshman class into a side-by-side experiment with Northbrook High School, the district high school that draws a student population that is almost entirely low-income and minority.

I sat down with Northbrook Principal Randolph Adami and YES Prep Principal Brian Reed, both of whom appeared intent on making a seemingly awkward relationship work. Each recognized that despite the wide acclaim the partnership has received – the district is a magnet for educators curious about the compact – the real proof is yet to come: Can bringing KIPP and YES Prep into the schools improve outcomes for all students, not just the charter students?

To put that question bluntly: Will there be 'rub-off'?

"I guess that's the $64 question," said Adami. "As we've just gotten the year started, there hasn't been an opportunity to have

much collaboration." But collaboration is planned, including class observations and common planning periods.

Adami and Reed agreed that the state algebra and English tests would be good barometers for whether rub-off is working. "I mean, if our scores went up 5 percent, we'd be pretty happy," said Adami. "Do I think that's possible? Yes, definitely. But you know, we have to wait and see."

In theory, rub-off should not be necessary. Everyone agrees that the students in both the KIPP and YES Prep middle school programs are benefiting from improved performance. Shouldn't that be sufficient?

I say yes, but Scott Muri, the superintendent who succeeded Klussmann, disagrees. Although Muri supports the charter compact, he insists on broader benefits. To date, there has been no rub-off in those middle school experiments. "We want all of those kids to be achieving success in whatever way that we can do that," Muri told me. "If we're not getting results for all children, then we have to re-evaluate that investment," he said, referring to the compact.

Collaborations, compacts, portfolio districts: What's interesting about these charter/district interactions is how many are flourishing under the radar. Just like the little-known collaboration in New York City with Uncommon schools. Despite the anti-charter rancor among top politicians in New York, Uncommon CEO Brett Peiser said he never runs across hostility when working with traditional New York City educators in collaborative work.

"I think there's no reason why there can't be good work going on at the ground level between folks who have a ton in common,"

said Peiser.

Why are district leaders who are often publicly critical of charters reaching out for partnerships? Necessity, the same reason the growth of these charter groups is inevitable. Without those charters, cities such as Denver, Washington, D.C., and Los Angeles stand little chance of making dramatic school improvements in high-poverty neighborhoods.

The *Pushback* Campaigns

The better the charter school,
the bigger the pushback

Los Angeles, Newark, New Orleans
2016

Chapter 13

Anyone wishing to witness a full-throated pushback campaign

against charter schools need visit only one city: Los Angeles.

Here in the City of Angels you will find it all. A school district, Los Angeles Unified, which is doing its best to make life bureaucratically miserable for the 228 charter schools here (even though it also authorizes them). A union, United Teachers Los Angeles, locked in close combat with the charters, blaming them for the enrollment losses in the district. And an elected school board, which charter advocates and unions try to influence, that is increasingly hostile toward charters.

Although tensions are especially high here in 2016, the pushback against charter schools is a national phenomenon, spurred by three circumstances developed and honed by charter critics. At the top of the list, as seen in L.A., are student enrollment losses that are blamed on charter schools drawing away their students (and revenue).

The second factor: a deepening split among Democrats between charter-hating progressives and charter-tolerant liberals (think New York's famously progressive Mayor Bill de Blasio versus Gov. Andrew Cuomo, a more traditional liberal).

The third player is harder to grasp but possibly the most important factor in the pushback movement: the poverty debate. How much can educators improve lives for poor and minority children without first making major headway in solving the root problems associated with growing up poor?

It's worth taking a moment to spell them out one by one.

Enrollment losses

Los Angeles is hardly the only traditional school district to lose students to charter schools; it's just that the losses here are exceptionally steep. In 2002, the district hit its enrollment high at 750,000, and today there are only 550,000 students in non-charter LAUSD schools.

At a May 2016 hearing, L.A. school board member Richard Vladovic publicly admitted: "We are bleeding."

On the surface, then, an attack on charters from both the district and the union makes sense. It's a matter of survival.

The problem, however, is that the blame-the-charters campaign attempts to divert public attention from deeper fiscal problems that have nothing to do with charters.

The L.A. school district is going broke fast, unable to pay

for the lavish retirement packages won by the union and unable to pay for current expenses with the loss of so many students. But only about half of those student losses can be blamed on the charters, according to the district's own accounting. The rest of the losses are due to natural demographic declines, parents moving out of the city and parents placing their children in private schools.

The district appears to have little appetite for reining in expenses: In the midst of rapid enrollment declines over the past several years, the district added both teachers and central office staff. Which leaves the anti-charter campaign as the more attractive option.

And the union is preparing for a long battle, fired up by a proposal from prominent philanthropists, led by the Broad Foundation, to fund rapid expansion of charter schools and other high quality alternatives. In early 2016, union President Alex Caputo-Pearl persuaded his members to approve a dues hike (by a third, bringing it to $1,000 a year) to create a fund aimed at fighting charters.

The vote? Not even close: 82 percent of the teachers agreed to the dues hike. With that kind of fervor, the fight to push back against charters over enrollment losses is likely to escalate. What's the alternative? (In June 2016, the nonprofit Great Public Schools Now released a new proposal that differed from the earlier leaked plan. Surely shaped by the intense pushback against an all-charter campaign, the 2016 plan would fund expansions and replications of successful schools, both charter and traditional.)

Similar charter pushback movements sparked by enrollment declines have been seen in Detroit and Philadelphia. In Detroit, where the school system lost 100,000 students over the past decade,

politicians fearing the total collapse of the traditional district proposed a commission to limit charter growth.

"It's come to a tipping point for many of these districts like Detroit," Ron Zimmer, an education professor at Vanderbilt University, told the Associated Press. "They just can't finance their school district that was meant for a much bigger enrollment than they currently have."

Can't the districts downsize? Some can, but not without considerable pain. In Washington, D.C., where charter students have grown to 45 percent of the district's student population, the district managed to downsize while remaining academically competitive with the charters. It seems to be a charter/district balance that works.

But the school closings that made that possible were part of the reason former mayor Adrian Fenty and his handpicked schools chancellor, Michelle Rhee, both lost their jobs there. For political leaders, closing schools can be a lose-lose proposition. (One notable exception: New York City's former mayor Michael Bloomberg.)

The sprawling Los Angeles district, a startling 720 square miles, would have a far harder time downsizing. But then again, L.A. hasn't really tried.

Parents who choose charter schools, and take their slice of per-pupil funding elsewhere, may be only part of the reason that finances in big urban school districts are in trouble. But the students leaving these traditional schools make district revitalization far more difficult. Which means the charter pushback driven specifically by enrollment drops is only like to intensify.

The Democratic divide

Most people were introduced to the split among Democrats when New York's newly elected Mayor de Blasio decided to crack down on charters given space in district buildings, only to find Gov. Cuomo riding to the rescue of those very schools. Progressive versus Liberal.

But this is an ideological divide that had been simmering for years. I first came across it when reporting on my book about Rocketship charter schools in San Jose, California.

Most of the 31 school districts in sprawling Santa Clara County were wary of charters, which made it hard for Rocketship to win approvals to open schools in their districts. But the county board, which by law held the power to overturn charter rejections by the local districts, embraced the idea that someone was finally stepping up to fix an obvious educational malpractice, the widespread failure to offer Hispanic children a shot at a better life.

In the county board, Rocketship found a champion in goateed, long-haired Joseph DiSalvo, who is exactly what he looks like: an unreconstructed 1960s lefty who, when it comes to kids, never left his leftiness behind. Especially intriguing about DiSalvo, a former teacher and principal in San Jose, is that he once served as a union president.

At least for a time, almost any charter Rocketship proposed got green-lighted – even multiple charters that might or might not get launched in the future. Why?

As DiSalvo put it: "The status quo was unacceptable: 50

Anti-Rocketship poster in front of new Milwaukee school
— *courtesy of Rocketship*

percent of San Jose's students scored below grade level proficiency on math and language arts on the California Standards test, and there was an achievement gap of at least 30 percent ... Rocketship's schools show that their blended learning model, use of Teach For America teachers and teacher home visits ... produce extraordinary results for a mostly free-orreduced-price-lunch-qualified population of learners. Hundreds of parents signed up for Rocketship's waiting list to win a lottery slot for their children to be enrolled."

But Rocketship's free ride proved to be short lived, partly because of the rapid shift in politics. DiSalvo is an old-school liberal at a time when progressive liberals are on the rise – as Hillary Clinton discovered in the fierce challenge from Sen. Bernie Sanders for the party's presidential nomination. Whereas the Cuomo wing of the Democratic Party sees charters as a tool to solve educational inequality, progressive Democrats see charters as a tool of billionaires out to gut neighborhood public schools and vanquish teachers unions.

In San Jose, the leading progressive who emerged, Brett Bymaster, couldn't be more different from DiSalvo. Bymaster is young

(36 at the time), very tall, very thin, highly educated – a successful hearing-aid engineer. He's white, and he lived with his wife in a mostly Latino neighborhood called Tamien where Rocketship wanted to place a school. Best feature about Bymaster: He zoomed around his neighborhood on a Xootr, an adult kick scooter. Talk about standing out.

At the time, I thought of Bymaster as a colorful charter critic with honorable intentions – but someone who would never prevail. His website, Stop Rocketship, struck me as minor-league advocacy. But I was wrong. Stop Rocketship proved to be a deft and powerful opponent of not just Rocketship but all charters.

Bymaster's Stop Rocketship efforts, twinned with newly energized anti-charter campaigns waged by local superintendents fearful of charters, successfully blunted Rocketship's ambitious expansion plans there.

Much like the fights over dwindling enrollments, this fight among Democrats shows no sign of abating, with charter schools caught in the middle. In the coming years it is likely we will see more, not less, pushback against charters along Democratic political fault lines.

The poverty argument

Do schools struggle because families struggle with poverty? Of course they do.

For years school leaders watched with alarm as the school-age population reached the half-minority/poverty threshold. Children who arrive on their doorsteps speaking little English, or raised in a single-family home with blaring TVs and no books, make their already challenging job far more difficult – which explains the hundreds of schools showing single-digit percentages of students proficient in math, reading or both. That's what poverty does, the school leaders explain.

Solve poverty and those proficiency rates will soar, say most teachers, superintendents and union presidents. Point taken.

But the story is far from wrapped up. For starters, some traditional urban school districts do far better than others when it comes to educating impoverished children. I saw that up close during several visits to Long Beach, California, where a veteran superintendent, Christopher Steinhauser, backed by a supportive community, has pushed academic achievement there far above what's seen in similar California districts. He's not alone. Superintendents in Charlotte, North Carolina, and Duval County, Florida, appear to have similar success.

Clearly, poverty isn't entirely destiny, even in some traditional districts.

Now enter the charters, especially the high-performing charters I'm writing about here. These schools consistently demonstrate the ability to make more than a small dent in the poverty impact.

In some cases, the achievement gap disappears entirely. Consider the profile of Boston's Brooke charters in a later chapter.

Charter critics explain away the success by saying charters

cherry-pick their students. Enrolling parents who choose their school undoubtedly gives those schools a bit of a tail wind. But that alone can't explain the sizable success gap.

While researching the controversial school reforms in Newark, I came across North Star Academy Alexander Street Elementary School, a beleaguered school "transformed" by Uncommon Schools, which in this case meant offering to take every student who was there the year before. There was no chance of cherry-picking by allowing parents to self-select and thus receiving more motivated students.

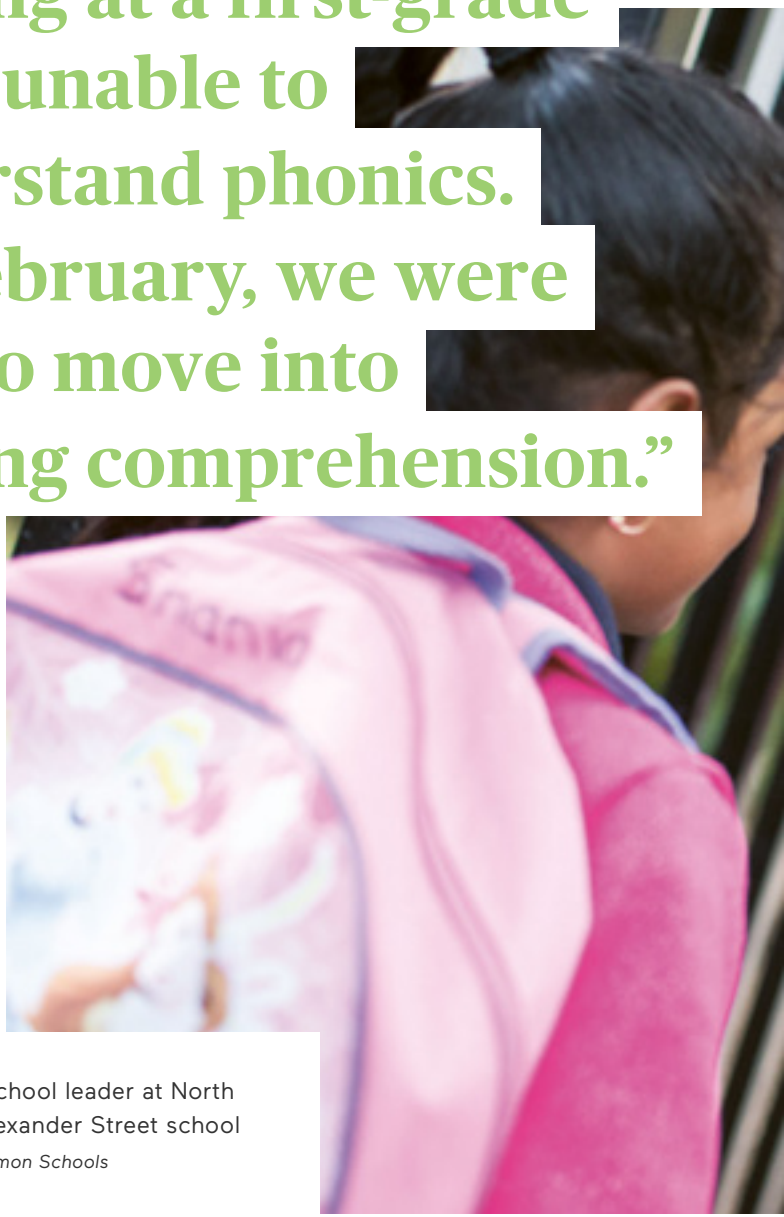
These schools consistently demonstrate the ability to make more than a small dent in the poverty impact.

When Alexander students arrived for their first year at the transformed school, the new staff expected to find some learning deficits, but they were shocked by the severity: Baseline testing took twice as long as expected because testers had to keep searching for ever more remedial material.

Fourth-graders were reading at a first-grade level, unable to understand phonics. "Once we got these results, we had to throw out the playbook," said school leader Juliana Worrell. "We weren't able to use our normal curriculum." They quickly purchased phonics materials and focused just on phonics for 30 minutes a day. "By February, we were able to move into reading comprehension."

The previous staff had warned Worrell that parent participation was a problem. They won't show up unless you offer a meal,

Fourth-graders were reading at a first-grade level, unable to understand phonics. "By February, we were able to move into reading comprehension."



Juliana Worrell, school leader at North Star Academy Alexander Street school

— courtesy of Uncommon Schools

Worrell was told. For the first parent gathering, the school offered a full chicken dinner. Still, only about 15 parents came. What followed was a full-court press: door-knocking at home and phoning. Parents who seemed unreachable got put on a list, and school staffers would wait for them at pickup times.

By November, the time of school conferences, the school reached 90 percent participation – without offering free dinner. "The parents knew how much we valued this," said Worrell. "Today, Alexander has a really strong parent council."

Bottom line: In just one year, Alexander students came close to the state average in English for affluent New Jersey schools and exceeded it in math. These are stunning results, especially considering that before Uncommon took over, former superintendent Cami Anderson used to cry after visiting this school. It was that bad.

While the Alexander story may be rare – turning around a failing school, even for a top charter, can be daunting – the transformation there illustrates that poverty need not be destiny. And that is why top-performing charters draw the most attacks from the pushback movement. New York's Success Academies, another charter group that eliminates racial performance gaps, is probably the best example of drawing those attacks.

Why go after a school that's succeeding with poor kids? Because if the poverty-explains-all explanation folds, school leaders and union presidents are left exposed. If Uncommon and Success can do it, why can't they?

The Alexander story reminds me of the advice Rocketship co-founder John Danner received from a veteran education reformer

before he launched his first school: "People are going to hate you for this."

At the time, Danner thought that advice was crazy funny. But it all came true: High-performing Hispanic students in Rocketship charters in East San Jose presented a clear threat to neighborhood schools. And he was hated for it.

Thus the odd maxim that holds true in the pushback movement: Low-performing charters are mostly ignored or quietly welcomed as proof that charters can't do any better than traditional schools in high-poverty neighborhoods. The high performers draw the flak. (There are some exceptions: KIPP schools, which keep a very low political profile and aggressively research their outcomes, generally avoid those attacks.)

On the surface at least, that would appear to doom the high-performing charters. But there's an outlier in play here:

The necessity factor

Let's bring Newark back into the discussion: Newark, where charter enrollment will jump 10 percentage points in 2016 alone, illustrates the "necessity" issue that guarantees the proliferation of top charters.

If Newark political leaders had a choice, it appears likely they would cut off charters and return to the old model where schools were "The Prize" – not just the biggest source of middle-class jobs but also the key political base for aspiring politicians.

At the same time, Newark leaders know they can't ignore schools such as Uncommon's Alexander Street. They can't ignore the fact that KIPP, not the traditional district, is the biggest college pipeline for African-American students. They can't ignore the parent demand for good charters.

Thus, they can't lean entirely on the poverty argument. Charters may be unpopular with many elected officials, but they are necessary. Too necessary to kill off.

The lessons from Newark aren't lost on nearby cities such as Camden, where political leaders accepted, rather than fought, the necessity of bringing top charters into the fold. It's why you see school leaders in Denver folding top charters there into its school system: necessity.

Take the Denver School of Science and Technology, which operates out of district-owned buildings. Already, it runs the top two high schools in the city as well as the top three middle schools. At full buildout, the charter group will graduate 700 students a year, which in turn would double the number of Denver seniors who graduate academically qualified to enter four-year colleges.

Necessity is why Rocketship, despite a spirited campaign denigrating its schools, was allowed to open a new school in Washington, D.C.'s impoverished Eighth Ward. How else to boost academic performance there? And necessity is why New York's Mott Haven Academy, which draws students involved with the foster care system, just got approval to open a middle school. The school is succeeding with a population that generally fares horribly in the traditional system. The Mott Haven expansion is

necessary.

In New York City, there were 44,400 kids on charter school wait lists for the 2016-17 school year. That meant 68,000 students applied for 23,600 available seats, up from the 64,600 students who applied for 22,000 spots the year before. And Hispanic parents are increasingly turning to charters. Between 2003 and 2013, the percentage of Hispanics among charter school students rose from 21 to 30 percent. No surprise that Mayor de Blasio's campaign against charter schools never got traction. What politician wants to take on parents who consider these schools so necessary?

A New York City charter schools rally, 2015
— courtesy of The 74

The ultimate example of necessity, of course, is New Orleans, where the post-Katrina charterization of nearly the entire district has produced gains questioned only by pushback ideologues. Those New Orleans charters may not be perfect, but they are a huge step forward from the pre-Katrina schools, and there's no chance of peeling that back, regardless of continuous pressure from union-friendly politicians. It's the necessity of it all.

Necessity, of course, is not

enough to thwart the pushback movement. There's too much at stake here. If anything, as charters in cities such as Los Angeles continue to multiply as they demonstrate better results in high-poverty neighborhoods, the pushback movement is intensifying. And what will always heighten the charter tensions are co-locations, where district superintendents opt (or are compelled by law) to turn over unused space in a school, or even entire abandoned school buildings, to charter operators.

In cities with expensive real estate, such as New York and Los Angeles, those co-locations are often the only way top charters can expand. But the parents, teachers and principals in those district schools forced to yield space don't always see it in those terms. They see a possible art room or conference room that's now being handed over to a charter. The result: Parents who otherwise might be neutral about charters are now joining with unions and district principals and teachers to fight back against charter school leaders and families eager to turn unused public facilities into classrooms.

Some reform superintendents, of course, see it very differently: "We took the view, and it was controversial, that the schools belonged to the children," said Joel Klein, the former schools chancellor in New York.

Contentious, combustible stuff.

Buckle up.

Graduating From High School Isn't *Enough*

The bucket of cold water
that changed everything

San Francisco
2011

Chapter 14

Most people think the story of KIPP charter schools

is a story about two guys in Houston, Dave Levin and Mike Feinberg, launching a network of high-performing charter schools that today includes 183 schools educating 70,000 students. They're right; it's a great story, one told well in Jay Mathews's book *Work Hard. Be Nice.*

I won't retell that story here. Instead, I will argue that KIPP's other story, its research, is every bit as influential as the charter network itself. That research is thorough and unsparing and has affected nearly every school in America, traditional and charter.

For this book I will focus on a single piece of research, the College Completion Report, one that proved somewhat unflattering to KIPP in the short run but also one that continues to have positive long-term benefits for both KIPP and other charter networks in increasing overall college completion rates.

The College Completion Report was unveiled in late April 2011

and hit with a very hard thud – and not just in KIPP-world. There was some promising news: 31 percent of early-generation KIPP middle school students graduated from (four-year) colleges within six years, which at that point in time was three times the graduation rate for low-income, minority students nationally.

The problem was that the graduation rate fell far short of what high-achieving charters like KIPP thought they could accomplish (and predicted they would achieve), which is closer to 75 percent. The headline written by Jay Mathews when he wrote about the report in *The Washington Post*: "KIPP criticizes its college graduation record."

At the time the report came out, KIPP was already well on its way to reshaping its approach for making sure its graduates not only got into college but also graduated from college. That's an interesting story I'll tell shortly. But the significance of the report went well beyond KIPP's internal changes.

In this report, KIPP threw down three data gauntlets and dared others to follow.

First, KIPP reported its college completion statistics by tracking students all the way from eighth grade. Traditionally, schools just tracked from the senior year, conveniently ignoring all the students who dropped out between eighth and 12th grades. Better public relations, of course, but what about all those dropouts? If your program succeeded only by losing the less successful kids, then was your program truly successful?

Second, KIPP reported its college statistics based on which students actually graduated. Still today, scores of schools report only

The KIPP team, Dave Levin, Richard Barth and Mike Feinberg, in 2013
— courtesy of KIPP

the percent accepted to college. Sure, the latter strategy makes you look better, but how honest is that? If you get your students accepted but don't prepare them to succeed in college, then is your program truly successful?

I can only imagine the gasps and red faces around the country when charter school boards met to discuss their "100 percent accepted" claims: Should we really be doing this without saying how many actually make it through college to earn a degree? Seeing schools issue those 100 percent claims "drives me crazy," KIPP CEO Richard Barth told me. And it should.

Third, KIPP made all its findings public. Considering that KIPP's college track record fell short, that was pretty brave. They could have kept it quiet. But as Barth puts it, you shouldn't maintain two stories – a blunt story for internal consumption and a cheery

one for the general public. Will others be brave enough to make their internal studies public?

Add it all up: College completion rates, for both charter and traditional students, fall well short of what many school leaders have been claiming. That's the equivalent of hundreds of schools pouring buckets of freezing water over their heads.

It was a wake-up call. Given that KIPP was first out of the blocks with full disclosure, the next question was: What's KIPP going to do about it?

KIPP commissioned the College Completion Report because it already knew something wasn't working. "We stay in touch with our alums, and we recognized they were going off to high schools that weren't doing right by them," said Barth. That was part of the reason KIPP, which started off as a network of middle schools, realized that wasn't sufficient.

Around 2009, KIPP made a strategic pivot. "I went to the KIPP Foundation board and said we are not going to fulfill our promises if we're not starting earlier with our kids and staying with them longer," said Barth. No longer was the goal to go wider with more middle schools. Rather, the goal was to go deeper with elementary and high schools.

A startling fact that KIPP learned since developing its own high schools: Attending a KIPP high school rather than the neighborhood high school boosts a student's chance of graduating from college by 20 percentage points.

Plus, KIPP realized that academics alone would not get its kids through college. In a story well told by writer/author Paul Tough,

KIPP co-founder Levin noticed that the KIPP graduates who successfully navigated college weren't necessarily the students with the best academic records. Wrote Tough in *The New York Times Magazine*: "They were the ones with exceptional character strengths, like optimism and persistence and social intelligence. They were the ones who were able to recover from a bad grade and resolve to do better next time; to bounce back from a fight with their parents; to resist the urge to go out to the movies and stay home and study instead; to persuade professors to give them extra help after class. Those skills weren't enough on their own to earn students a B.A., Levin knew. But for young people without the benefit of a lot of family resources, without the kind of safety net that their wealthier peers enjoyed, they seemed an indispensable part of making it to graduation day."

The solution: First KIPP, and then other schools, settled on the findings of researchers like doctors Martin Seligman, Chris Peterson and Angela Duckworth, the latter of whom pioneered what is now known, in a cliché sort of way, as "grit." What was hard for the entire generation of no-excuses charter operators to admit was that the very practices that allowed them to produce higher test scores – the exacting discipline, lofty expectations and rigorous course work – were insufficient. Kids who had been hyper-guided through K-12 schools suddenly found themselves on college campuses without any of those supports and lacking gritty personality traits. And they dropped out at alarming rates (though those rates were still lower than the national average). It takes both academics and grit.

The two-part solution called for next-generation learning which focuses on students directing their own learning (thus

developing grit) and bringing intense support networks to college campuses, thus giving poor kids the kind of backing that middle-class college students take for granted. KIPP's "character counts" program – a chart I've seen posted outside KIPP classrooms – is just one example. Teachers are reminded of the seven "strengths" that need development along with math and reading skills: zest, grit, optimism, self-control, gratitude, social intelligence and curiosity.

Three years ago, only about one in 10 KIPP graduates enrolled at the best colleges for them; today, it is about one in four.

It's not that the old charter schools approach ceased to exist after the spring of 2011. It's more that the top charters, the top 20 percent, shifted gears quickly. Guiding this transition were the top charter philanthropists who wanted to invest only in charters that were re-tooling to boost college completion.

"After some intense soul-searching, these charters networks are doing what it will take to give kids everything they need," said Stacey Childress, who heads up the NewSchools Venture Fund. "Not just great reading and math scores, not just great college admission scores, but all of the other skills, habits and mind-sets they need to be successful not just in college but through the course of their lives."

Perhaps the most dramatic change KIPP made as a result of that research is its College Match program. A big factor in why some KIPP students earned a degree and others didn't was the college they chose. "We began to realize that where you go to college

really matters," said Barth. "Like, it is absolutely life-changing. We were watching what happened to our 12th-graders when they went to college, and we learned that at each level of selectivity – competitive, highly competitive – some colleges are better at graduating first generation college-goers than others. So we began a match program."

What the graduation data showed was that within a given state, three different state universities, each with similar selection criteria and the same tuition, might produce very different results for KIPP students. What explains that? It starts with the financial aid package; then there's the social networking issue. Are there other students like you? Is there a single point of contact for first-generation college students, someone who won't just send the student to eight other possible places to solve their problem? Most of all, going forward, are there colleges and universities willing to build those support systems? Who wants to work with us?

The result: a network of about 80 colleges that want to work with KIPP. The next task was to make sure KIPP graduates found their way to those KIPP-friendly places. The answer: intense guidance. Three years ago, only about one in 10 KIPP graduates enrolled at the best colleges for them; today, it is about one in four. That's a rapid change.

The colleges that are good for KIPP students run the full gamut of selectivity. In 2016 KIPP had about 40 students at the Ivy League's University of Pennsylvania, home to the "grit" researchers. An additional 35 attended Pennsylvania's Franklin & Marshall College.

"What are these folks doing?" asks Barth. "First they are looking at our KIPPsters and seeing immense potential. Second, they're

looking into the world of these students and seeing how they can optimize their financial packages so the students can cover what is needed and not end up with extreme levels of personal debt. Three, these are campuses where our kids are socializing, where they can be involved in campus activities."

To put it bluntly, said Barth, there are lots of colleges out there simply unwilling to make those commitments. "These are places where first-generation kids just don't feel like it's a place for them."

By contrast, Franklin & Marshall converted "merit" aid to need aid – a bold move considering how most colleges use so-called merit aid to boost their ranking status. The college also scaled back the much-written-about facilities arms race (who has the sexiest climbing wall in the student union?) to pump more money into student aid. Shifting surpluses to student aid also helped, said Barth.

Barth credits F&M president Daniel Porterfield with making what he describes as "potentially third-rail" decisions to make his college more welcoming to first-generation students. "He has made the case with his board that in doing this, the student body will be higher-performing; there will be more fellowships, more Fulbright winners. That's a remarkable example of what can be done. We're looking for other partners who have that level of commitment."

What KIPP learned in getting poor and minority students into colleges that succeed with first-generation students was quickly passed along to both charters and traditional districts. In Arkansas's Delta, for example, a place where students almost never made it to the University of Arkansas, a KIPP collaboration with counselors at local schools there changed that pattern.

KIPP Delta has partnered with two neighboring high schools – Central High School in Helena and Lee High School in Lee County – to support college completion. Amy Charpentier, the director for KIPP Through College at KIPP Delta, supervises two college counselors at Central High and one counselor at Lee High, whose positions are funded through a grant KIPP Delta received from the Walton Family Foundation. The results to date: Last year, the partnership more than doubled the four-year college-going rates for seniors at Central High School and increased the four-year college-going rates by nearly half for seniors at Lee High School.

Relations between charters and district schools are always delicate, but in this case the principals and superintendents agreed their students weren't getting the college guidance they deserved and agreed to the KIPP counselors coming to their schools, said Charpentier.

An example of low-hanging fruit to grab, said Charpentier, was getting all the students to take the ACT. "That doesn't sound hard, but there's not great internet access here, where it's rural and remote. We made an announcement about the sign-up and that there would be a fee waiver, and we just took all the English classes to the computer class, where we helped them register."

Barth said he just got a similar collaboration request from the superintendent of Philadelphia's schools.

"There's nothing we're doing with counseling that's proprietary," said Barth, who said he was open to more collaborations. "We're at a place where it's sharable, and the more first-generation kids who can get this kind of guidance, the better."

Is it possible that KIPP's research may end up having even greater impact than its 183 schools, especially when it comes to the design of next-generation schools?

Part Three

The Dawn of 3.0 Charters

Loving learning at
The Greenfield School
— courtesy of Achievement First

Summit *Basecamp* Schools

Investing in scale

Rhode Island
2016

Chapter 15

In the 2015 documentary *Most Likely to Succeed,*

the filmmakers focus solely on the education revolution known as High Tech High, the San Diego charter school launched in 2000 that today has grown to 13 schools, including elementary and middle schools. A telling sign of High Tech High's early potential: The school won a grant in NewSchools Venture Fund's very first fund.

Founder Larry Rosenstock has built out a vision of education that truly is different: classroom schedules that aren't divided neatly by subjects, teachers whose contracts are renewed annually, no ringing bells to signal periods. All the learning is project-based, meant to stimulate the soft skills such as collaboration, time management, resourcefulness and, above all, grit. In short, the High Tech schools are a vision of student-directed learning that emerged way, way before other schools settled on the same vision. The movie warrants watching; Rosenstock's schools merit visiting.

Today, there are a dozen or more school models that not only have caught up with High Tech but perhaps offer equally promising visions, several of which may be easier to replicate than High Tech High. Many of the schools are underwritten by Next Generation Learning Challenges, a Gates Foundation version of next-generation philanthropy.

To sketch out where charters are headed in the future, I will offer four profiles of charters that qualify as next-generation schools.

Rhode Island's Blackstone Valley Prep

Watching a 15-year-old fiddle with his laptop in this out-of-the-way parish school converted into a charter school seems like an odd way to catch a glimpse of education's future.

But that's what Ray Varone is revealing as he fires up his Chromebook to demonstrate.

A lot went into this auspicious moment. You start with the school, Blackstone Valley Prep, already a standout for successfully drawing a mix of middle-class and poor students. Then you stir in a sizable grant from Next Generation Learning Challenges to experiment with ways to rethink high school.

Finally, and I suspect this may be the most important development, you wrap it all together with Summit Basecamp software, a personalized learning tool released by perhaps the most innovative

charter group in the country, California's Summit Public Schools. Their ideas were given wings with a team of top code writers donated by Facebook. Only a few schools got chosen as early adopters, including Blackstone. Although new, the learning program appears to be off to a promising start.

And so it all comes together with Varone, who is proudly skimming the Basecamp program. And as anyone of a certain generation who has watched a teenager demonstrate software knows, your first reaction is to say: "Wait, slow down! Show me that again!"

Blackstone's charter high school is at the pointy edge of the search for the Version 3.0 high school, the school that will point us toward the future: Where is it and what does it look like?

The search shouldn't be that hard. For the past several years, some of the country's brightest tech minds and wealthiest foundations have joined hands with the White House to solve one of America's most remedy-resistant problems: High school is boring.

I know, I know – you knew that already. From firsthand experience. Only things have gotten worse.

If you look at test scores, school improvement efforts turn up in elementary and middle schools but not high school. High school is the place where too many students drop out, especially in ninth grade, just as students get their first taste of it. High school is where they get diplomas that too often prove worthless when they try to take college placement tests. It's so bad, movies are being made about it.

Sure, there are private schools and wealthy suburban schools where the quest for getting into top colleges is so intense that some students wilt, or worse, under the pressure. Trust me: These students

Student Ray Varone uses Basecamp software at Blackstone Valley Prep
— photo by Richard Whitmire

may draw a lot of media attention, but they are the exceptions.

For most high schoolers, the problem lies on the opposite side of the intensity scale. Low-income and minority students, who now make up roughly half the nation's school population, either don't make it to college, get quickly disqualified from taking for-credit classes or drop out partway through.

So what do all these genius high-tech school reformers have in mind? There are a few places around the country where you can get a glimpse, and one of them is Blackstone.

First, some background. As I reviewed in an earlier chapter, the first research pinpointing key problems within a charter school – and suggesting possible solutions – came from a charter, KIPP, whose leaders were disappointed with the data revealed in a College Completion Report done several years ago. Students they thought were well equipped for college work dropped out at higher rates than

expected.

Put more simply, culture-intense charter schools that dramatically bumped up K-12 learning discovered that once their students sailed past the gravity field of that intense classroom culture, they found themselves ill-equipped to survive on their own.

In short, they lacked "grit."

That research led to a lot of dramatic changes at charters, with KIPP leading the way. What was needed, the charters concluded, was a full-speed shift to personalized learning, building the sticky, gritty independent learning skills that would propel them through an often-lonely college journey. The term of art: self-directed learning.

The Basecamp software, which Varone is using, turns learning upside down. Actual learning time is up to the student, to do at designated times within school or at home. Classroom time is more for projects, group collaborations and advice from the teacher on how to manage the "Personalized Learning Plan" (PLP).

Not surprisingly, the Basecamp software arose out of Silicon Valley. There, Summit charter schools, already pushing the edges of personalized learning, caught the attention of Facebook CEO Mark Zuckerberg when he visited in 2013. Zuckerberg lent Summit a team of code writers, and thus was born Basecamp, a PLP for all subjects, grades 6 through 12.

So what does this new learning style look like?

The package comes loaded with about 200 "deeper learning" projects as well as 700 "playlists" such as videos and articles – anything that provides deeper knowledge. Basecamp is also adjustable, so schools can add and subtract what they think is important.

Screenshot of a Basecamp Personalized Learning Plan
— *courtesy of Summit Public Schools*

Blackstone did a lot of that, especially with math. For this school year, 19 schools were chosen as early adopters, including Blackstone.

Everything seems like a blur as Varone cycles through his subjects, showing all his projects – those in red are still due; those in blue are completed.

The heart of the software, everyone agrees, is the steady, vertical "pacer line" that cuts through all the projects. That shows students where they stand on each assignment and whether they are ahead of or behind schedule – creating a benchmark even as students are allowed to move at their own speed.

Pointing to the pacer line in each subject, Varone proudly demonstrates his progress in getting tasks completed. "We're getting used to doing this on our own, so we'll be reading in college. In

college, you're not going to have teachers there asking you questions all the time, so you have to learn by yourself."

I agree: His answer sounds canned. But there was nothing canned about what he was demonstrating on the Basecamp software: This was self-directed learning, the holy grail of any next-generation reinvention of high school.

When Blackstone Executive Director Jeremy Chiappetta and others set out to design a high school for rising Blackstone students, they drew on KIPP's lessons learned about reshaping academics around developing skills students would need to persist through college. "We knew our middle school model, while a great foundation of academic skills and discipline and focus and habits, would not be the driving foundation for our high school."

Blackstone's search for a new model drew a $450,000 grant from Next Generation Learning Challenges, followed by the decision to apply for early-adopter participation in Basecamp. That status triggered liberal support from Summit, including Blackstone staffers traveling to Summit for training, and Summit providing a former teacher for personal assistance.

All that, in turn, led to Varone sifting through his PLP and coming away satisfied that he was on top of things and ready for college work. And it didn't seem to be boring him at all.

That's how it's supposed to work, says Diane Tavenner, Summit's founder and Basecamp's chief engineer. "It's about giving students ownership and responsibility. The adults have the role of facilitating learning and mentoring and guiding."

Blackstone is one of 24 partner schools around the country

Diane Tavenner, founder and CEO of Summit Public Schools
— courtesy of Summit Public Schools

piloting the platform. But no one should look at Basecamp as the "one" model to which all charters will evolve. There is no single model, Tavenner told me. "We're moving into an environment of continuous improvement ... The model is forever changing and adapting."

A very Silicon Valley way of looking at the world – and charters.

The *Greenfield* School

Starting with a clean slate

New Haven, Connecticut
2016

Chapter 16

In any history of high-performing charters,

Achievement First's Dacia Toll qualifies as an early adopter of a network of charter schools. She was a law student at Yale, thinking hard about social justice, when she concluded it all starts "downstream," in school. So while still in law school, she started pursuing teaching credentials, carrying out her student teaching at New Haven's Fair Haven Middle School.

There she found seventh- and eighth-graders who were near-illiterate. Told to build a lesson around the book *Johnny Tremain*, Toll found the task impossible. How can you teach lessons from a book the kids can't read? The answer from her mentor teacher: Well, then, show them the movie.

Such attitudes about poor kids – that an adequate education was impossible and thus needn't be sought – prompted her to create the Achievement First network of schools, starting with New Haven's

landmark Amistad Academy. Today, Achievement First operates 30 successful schools in Connecticut, New York and Rhode Island.

So, it should surprise no one that Toll has once again become an early adopter in reinventing a charter model that was already working pretty well for poor kids. As with the leaders of other top charters, she realized that boosting academic achievement in K-12 wasn't sufficient to carry poor students through college. That challenge required a new kind of school.

Asked Toll: What would such a school look like if you started with a greenfield? A complete do-over? Answering that question took Toll and her team on an unusual journey. Essentially, she set up a skunkworks operation – independent research that operated separately from her other schools – and hired outside school design experts to do the work.

That work began with a limitless "blue sky" phase led by IDEO, an international design firm founded in Silicon Valley (think Apple's first mouse). Overseeing all the design work was Aylon Samouha, someone I first met when he was chief of schools for Rocketship charters. Samouha, a former senior vice president for Teach For America (where he came across Rocketship), teamed up with Jeff Wetzler, who in the beginning of the project straddled his innovation work with Teach For America to join the greenfield experiment.

The team visited some of the best charter groups in the country and pulled something from each:

From Summit came an emphasis on personalized learning plans that always focus on learning content. "In order to do project-based learning, the kind of stuff that Summit is doing, you need to

actually have information in your working memory," said Samouha. "You can't just have the skill of being able to synthesize."

From BASIS, the team absorbed more lessons about the need to master actual content: real facts that get absorbed. "There's probably no other place I've visited that has such a commitment to content," said Samouha. "Studies suggest that if you know something about baseball, you can read a text about baseball that's two years ahead of your reading level."

From California's High Tech High, they took away lessons on how to do project-based learning. "Their culture is very student driven. They are in charge of the learning in a way that you really rarely find. We took some inspiration from that."

From a Montessori school in Austin, they absorbed lessons about playing the long game. "They were building the executive function of kids by allowing them to make their own choices."

From the Brooke charters in Boston, they drew lessons about instilling a love of reading among the students, as well as some lessons about the limits of blended learning. Brooke, perhaps the most successful charter group in the country, shuns online learning.

From Rocketship, they drew lessons about parent involvement – and the promise of blended learning.

From KIPP founder Dave Levin, they borrowed lessons on how to build character, the "grit" that will see students through. "We continue to partner with the Character Lab," said Samouha, referring to the nonprofit that focuses on the practice of character development.

All that came together at the new Greenfield school, also known as Elm City College Prep, in New Haven. Most of the middle

From KIPP founder Dave Levin, they borrowed lessons on how to build character, the "grit" that will see students through.

Project-based learning in action at Elm City College Prep
— courtesy of Achievement First


ELM CITY
COLLEGE PREPARATORY

Students at Elm City College Prep
courtesy of Achievement First

schoolers here came from a traditional Achievement First elementary school, which falls more into the "no excuses" charter mold.

I visited Elm City soon after it opened. What struck me was the special challenge of applying the self-directed-learning model to middle school students. At Blackstone, the self-directed model seemed a natural fit for high schoolers, with more mature students welcoming the independence. Here, school leaders had a different challenge with middle schoolers: a need to build more "scaffolding" – eduspeak for support systems – to help less mature students slide into an unfamiliar role.

The Greenfield model appears to be on the way to working, but with a lot of tweaks, as in: lots more scaffolding. "We can give

kids a lot more freedom, but the fact is, these are 10- and 11-year-olds who have been their whole lives basically responding to whatever someone told them to do. They haven't been living in a personalized environment where they have autonomy and agency," said Samouha.

Dacia Toll, co-founder of Achievement First
— *courtesy of The 74*

But it seemed to be jelling. Fifth-grader Kiefer Valenzuela found the revised approach more demanding. "You have to concentrate so you don't get distracted, but I like SDL [self-directed learning]. I enjoy using technology to work, rather than writing on a piece of paper."

Ednovate & USC *Hybrid High*

Lessons in sharing and borrowing

Los Angeles
2016

Chapter 17

Any visitor to USC Hybrid High in downtown Los Angeles can see

that something different and interesting is going on: students are working in small teams of their choosing, quietly discussing projects even with earbuds connected to their laptops, while other students receive individualized attention from the teachers.

Also interesting is the connection between Ednovate, the recently launched CMO that oversees Hybrid High and its sister charters, and the University of Southern California Rossier School of Education, which launched the charters and continues to partner with Ednovate. Will Ednovate become a university-based charter model available to both charters and traditional schools? It's under discussion.

But the truly interesting thing about Ednovate is Oliver Sicat, who took over that first struggling charter from USC (his alma mater), set it on the right track and has the CMO on a path to five schools.

Sicat, a former Teacher of the Year at Boston Public Schools,

appears to represent the pinnacle of sharing, which is what this book is about – and what explains the growth of high-performing charters. Despite his success in Boston, Sicat switched to the charter world after touring Chicago's Noble Street schools in early 2006.

Oliver Sicat, who runs Ednovate charters
— *courtesy of USC Hybrid High*

"I looked at those schools, and the students looked like my students in Boston, but the Noble students were getting a completely different quality of instruction. That's when my anger really started. I remember hearing about performance pay and bonuses for teachers who are doing well. I remember hearing about a discipline program that made students freer, not less free. I remember seeing the Noble people in a room and saying to myself, 'This is my tribe; this is my

group.'"

And so Sicat became a charter entrepreneur, with a lot of help from more experienced charter founders. Just a short list of influences in Sicat's career:

From Chicago's Noble Street schools, where founder Michael Milkie offered him the chance to become a founding principal, Sicat drew the bulk of his model for Ednovate schools, especially the school culture.

Sicat also copied Noble's CMO strategy: The top leadership sets the minimum academic standards for schools and then challenges the principals to innovate and surpass that threshold. That innovation is what made Sicat's school, UIC College Prep, the top-performing (non-selective) high school in Chicago.

From Houston's YES Prep, Sicat drew his model for hiring teachers. "[Founder] Chris Barbic just emailed his whole hiring packet," said Sicat. "That's what is fantastic about the charter movement. You meet someone, and they say, 'Sure I'll share with you,' and they email you what you might think would be secret-sauce stuff."

From KIPP co-founder Dave Levin he borrowed heavily to build his teacher professional development system. "I remember going to Dave and saying that he did professional development really well. He was like, 'Hey, do you want to sit with me for a week while I plan it?' I said, 'Are you kidding me? Yes, I would love that.' So I watched him do a week of professional development and then sat with him afterwards to listen to him debate with his staff about what worked and didn't work."

From Uncommon Schools, especially the staff at Newark's

“That’s what is fantastic about the charter movement. You meet someone, and they say, ‘Sure I’ll share with you,’ and they email you what you might think would be secret-sauce stuff.”

Students at USC Hybrid High

— courtesy of USC Hybrid High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ional

North Star schools, Sicat borrowed heavily to create Hybrid's interim assessments. "During my first year at Noble, we sent five teachers to Uncommon to learn how they look at data. It was a young Paul Bambrick, before all his books, who told us how to give interim assessments." The Noble teachers then created their own assessments.

"At that point they weren't the greatest assessments, but there was so much buy-in because our teachers created them and used them." That buy-in with teacher-created instructional systems is clearly on display at Hybrid High.

Sicat's leadership training came from KIPP's School Leadership Programs, which should be considered unusual given that Sicat worked for Noble, not KIPP. In the world outside high-performing charters, that's nonsense. Does Apple offer spots in its leadership training program to up-and-coming Samsung executives? But within the world of top charters, that's the norm. Milkie and the KIPP leaders have always been close.

The result: In the summer of 2006, Sicat entered the KIPP School Leadership Summer Institute at Stanford University. "You learn how to design a school, how to lead a school, how to hire. It's the operational side of the work." Just as important, Sicat emerged with fresh contacts from his class there, people such as Ryan Hill, who now oversees KIPP schools in New Jersey; Darryl Cobb, who is now an investment partner at the Charter School Growth Fund, and Jason Singer, a former KIPP principal who later founded an online learning program and became an entrepreneur in residence at NewSchools Venture Fund.

From Diane Tavenner's Summit Public Schools, which Sicat

says he visits about three times a year, he draws lessons on using online learning to allow students to move at their own speed. Hybrid's program has a similar feel to Summit's Basecamp, with some important differences. Basecamp offers a curriculum used by all teachers, whereas Sicat's schools hew closer to the Noble model of allowing

USC Hybrid High's model borrows from the country's top charter schools
— *courtesy of USC Hybrid High*

more innovation at the school and classroom level. "We set the minimum platforms but tell teachers to create their own classes that they're going to share with others, and our schools will get better that way."

From Don Shalvey came seasoned advice on making career changes. Sicat got to know Shalvey after he left Noble to work for Mayor Rahm Emanuel. His work on a charter/district compact there drew the attention of Shalvey, who oversaw that work for the Gates Foundation. When the Chicago school politics got politically

challenging, Shalvey reached out to Sicat: "What are you thinking?"

Said Shalvey to Sicat: "Take your time, go for some long runs, and let me know what interests you." Sicat did exactly that and decided to return to running schools. "I wanted to be back on the supply side, on the school quality side." Sicat became an entrepreneur in residence with the Charter School Growth Fund and wanted to launch a school in L.A., which would allow him to return home to be with his ailing father.

The Fund tried to steer Sicat away from Los Angeles, to Las Vegas, but Sicat wanted to return to his hometown and family. Once again, Shalvey offered advice: "They [the Fund] probably won't be happy with you, but that will last only a year, because people need good schools. So, create a good school and good things will happen." Which is exactly what happened. Today, Ednovate is part of the Fund's portfolio as a "next-generation" school, with a commitment to help it grow to five schools.

Karen Symms Gallagher, dean of the Rossier School of Education, chairs Ednovate's board. The university, she said, wants to invest in "effective pipelines to get students ready for college ... We never went into this to become KIPP. We see it more as a model of personalized learning, to see what works. The point is to create multi-generational change."

From what I could see while visiting Hybrid High, Sicat and his schools appear to be on their way to joining the elite charters, perhaps even providing a next-generation model – the result of lessons shared from charter entrepreneurs who preceded him.

Edward Brooke *Charters*

One of America's best charters doesn't look like the others

Boston
2016

Chapter 18

This is my second visit to the East Boston campus of Edward Brooke Charter Schools.

During a previous visit I sat down with co-director Kimberly Steadman. She was helpful, but I'll have to admit I walked away wondering: Why is this (arguably) the nation's top-performing charter? I still don't get it.

A year later I returned, still looking to answer that question. I arrived a few days after the Massachusetts Board of Elementary and Secondary Education voted to allow Brooke to open a high school so that students from its three existing K-8 schools could transition into a Brooke high school.

Said state Commissioner Mitchell Chester: "It would be hard to overstate the track record of educational performance [at Brooke]." Keep in mind, this green light to expand happened in Massachusetts, a state in the throes of one of the nation's most bitter fights over charters.

This time I sat down with Steadman's husband, Brooke founder and co-director Jon Clark. Even an hour into the interview, I was worried once again: Am I going to walk away and still not understand Brooke's secret sauce (a horrible cliché, but it gets to the heart of it) that makes it the best charter school in Massachusetts, a state that boasts the nation's top-performing charters?

Among charter founders, Clark is unique. Quiet, studious, not given to bragging, not out to conquer the world by sprinkling charters in every state or even outside Boston, prone to crediting his wife more than himself, Clark offers only general clues to watch for as I start my classroom observations. It's all about the teaching, he advised me.

What school leader doesn't say that?

At the moment, the advice didn't seem particularly helpful. At the end of the day, was I going to climb into a cab to head back to Boston's Logan Airport still puzzling over how Brooke takes in a student population that's almost entirely low-income and entirely minority and turns them into scholars with test scores that match those of students enjoying the privilege of growing up white in a wealthy Boston suburb?

Some top charters talk about closing achievement gaps; Brooke actually does it.

Here's the challenge about Brooke: This is a group of three K-8 schools, essentially a mom-and-pop charter, a creation of Clark and Steadman. Aren't the nation's best charters supposed to emerge from prestigious charter management organizations such as KIPP and Achievement First?

There's more to the challenge. Unlike many top charters, especially Rocketship charters out of San Jose, a blended-learning pioneer (creating personalized learning by leaning on computer-based instruction) I followed for more than a year while writing my book, Brooke mostly eschews computer learning. No blended learning to be seen anywhere.

Why? Clark has yet to find a software learning program that impresses him. Brooke's entire emphasis is on teacher quality. Why would you subtract from teacher time by sending students off for laptop instruction?

The challenge goes on. Unlike many "no excuses" charter groups that adopt a heavily scripted instructional style that could be set to a metronome, Brooke is pretty laid-back. There's no heavy "culture" pressure here.

At Brooke, elementary students have carpeted squares they sit on for up-close-and-personal sessions with the teacher, but if a student happens to spill over into the next square, there's no command-and-control correction coming from the teacher. Yes, they file quietly through the hallways when changing classes, but nobody has to hold their hands behind their back or cupped in front of them.

In fact, if you suddenly forgot that every single student there comes from a non-privileged background, you could easily imagine you were in a private school.

Sounds intriguing, right? But how do they do it? I'm midway through my daylong stay here, and I still don't have a real clue. Clark doesn't make me feel any better when he advises me to watch classrooms for evidence of Brooke's twin-pillar philosophy in action:

"challenged" and "known." Challenged, I get. But "known?"

The first insight into my unanswered question came as I tagged along with teacher Heidi Deck after she walked her fourth-graders across the street in very blustery conditions to their physical education class. One defining thing about being a Brooke teacher, she said, is that the instruction always starts with an unfamiliar problem, something the students haven't seen before.

Deck went on to describe flipped instruction. In most math classrooms, teachers present a problem, demonstrate the solution and then have the students practice. It's dubbed the "I do–we do–you do" method of instruction. Rinse and repeat.

Not at Brooke. Here, teachers start by presenting a new problem and then inviting the students to solve it on their own, armed only with the tools from previous lessons. "We really push kids to be engaged with the struggle," explained Deck.

Next, the teacher invites students to collaborate with one another in trying to solve the problem, which is followed by more individual attempts to solve it. Then there's a classroom discussion about different ways students tried to solve it, with teachers doing their best to draw out solutions from the students. Ideally, they carry the weight of the instruction, learning from one another.

"The kids have to do the logical work of figuring something out rather than repeating what the teacher does," said Steadman, who acts as the chief academic officer.

That posits math instruction more in the real world. Aren't we always coming up against unfamiliar challenges, from calculating the wisest purchase to computing taxes?

And there's another advantage: There's no panic when Brooke students come across a math problem on the state exam they've never seen before. Instead, they ask: "What are the tools I already have to solve this?"

Here's another intriguing feature about Brooke: The reading scores here are as high as the math scores. That may not sound unusual, but it is. At almost any other top charter I visit that serves high-poverty students, the math scores tend to soar while the reading scores are barely any better than those at neighborhood schools.

Brooke teacher Heidi Deck, and all Brooke teachers, try to cultivate a love for reading
— photo by Richard Whitmire

Why? The explanation always offered is that math gets taught in classrooms; literacy is more rooted in home life. Plus, in charters that rely on using computerized blended learning, the math software is great; the literacy software, usually mediocre or worse.

The reason the math and reading scores align at Brooke comes

down to a simple but radical approach to literacy: Reading is taught not as something mechanical (you will never see a reading worksheet at Brooke) but as something to be loved. In a traditional school, including charters, a child struggling with reading gets special help in breaking down the process into small pieces, with teachers searching for deficits that need correcting.

Brooke emphasizes phonics as much as any other school, but on a broader level, a struggling reader at Brooke first gets asked: Why don't you love reading? To the Brooke teachers, finding a way to unlock that love is as important as, or more important than, isolating mechanical deficiencies.

"The goal is to get kids to love text so they become lifelong readers," said Steadman. "Our kids do well on tests because they love reading."

That was apparent on the day I spent at the East Boston school, with students given daily time to read what they loved reading. "If reading is so important," said Steadman, "they need to do it every day in school."

Yet another observation about Brooke. Visit any school in the country, charter or traditional, and the classroom walls will be full of colorful posters, student work and the daily academic goals. It wasn't until the third classroom I dropped in on that I noticed something different: At Brooke, the walls have that regular art, but slathered over the art are huge, jumbled tear sheets revealing classroom discussions about math, religion, history, a novel, pretty much anything.

These posters are chock-full of teacher scribbles of student comments. Kind of like those Hollywood movies about math savants

who fill blackboards with calculations. It all feels rich and creamy.

Take Deck's fourth-grade classroom: The back wall is covered with tear sheets revealing elaborate graphs created with orange, blue, purple and green markers. There's one labeled: Comparing decimals. Another: Divisibility rules. Another: What do I do with a remainder? On a side wall, two charts that break down a novel's inner workings are partially covered by a tear sheet spelling out the players in the Underground Railroad.

The complex wall art points to one thing: Some serious and enthusiastic scholarship took place here.

Here's something else you notice about Brooke: There are far fewer students walking through the hallways. Actually, this is a pretty big difference. (I may have saved the best for last.)

Brooke does something few middle schools do. It structures middle schools on an elementary school model, keeping students mostly with the same teachers throughout the day. All those in-school shuffles between math, reading and science, prompted by soul deafening buzzers? Not happening here.

Interesting story how that happened, and it's all about Kimberly Steadman. Or, to put it more precisely, it's all about Jon listening closely to Steadman, who arrived at Brooke in 2004 as a seventh-grade math teacher. Her prior experience had been as a fifth-grade math teacher. But really, she asked herself, "How different could it be teaching seventh grade?" As it turned out, a lot.

At that time, Brooke operated like a traditional middle school, where students changed classes to see teachers who specialized in math, reading or science. Thus, Steadman taught nothing but math,

All students should feel well known by Brooke teachers, something that is more likely to happen in the nurturing self-contained classrooms.

Brooke students work on independent reading
— courtesy of The 74

class after class – and didn't like it.

Aside from not getting to know the students that well, she missed the teacher collaboration she enjoyed in elementary schools where all the teachers who taught, let's say, fourth grade got together to plan what all fourth-grade classes should be studying that week. Wondered Steadman: "Why should middle school be different?"

After Steadman launched the Brooke elementary schools, internal teacher surveys revealed something interesting: Elementary teachers reported more satisfaction than the middle school teachers. Why? Because of the teacher-to-teacher collaboration.

"It's one of my big beliefs about how people work," said Steadman. "They like having thought partners, people they can talk to about the work they do. Being verbal about your work makes it more purposeful."

So why not shift middle school to the elementary school schedule? After a one-year successful pilot program with fifth grade, Brooke flipped the entire middle school to the homeroom model. Thus, teachers instruct all subjects, drawing on heavy collaboration with same-grade teachers. That guarantees a deeper relationship with the teacher, and it also cuts down on the time students spend shuffling from class to class.

But the biggest benefit may be teacher satisfaction. Said Clark: "If you ask any teacher at Brooke to name the biggest thing that pushes them to get better, I think they would answer it's having a smart colleague to co-plan with and look at data with."

That model also helps explain the "known" part of the Brooke twin-pillars philosophy: All students should feel well known

by Brooke teachers, something that is more likely to happen in the nurturing self-contained classrooms.

All the above factors, woven together, probably account for the high performance at Brooke. Which raises this question: If the nation's top charter school is headed in a direction different from other high performing charters, is that a problem? Put another way: If Summit's Basecamp approach, which is heavily laptop-focused, represents the future, what does that say about Brooke, where computers play minor roles? Who's on a better path, Summit or Brooke?

I don't pretend to have an answer, and the entire point of chartering is to welcome different pathways, but it's possible that these schools are more alike than they appear on the surface.

In many ways, Brooke operates as a traditional "no excuses" charter: There's no tenure at Brooke, salaries are set by performance, students wear uniforms, and the discipline is strict (the suspension rate is about 15 percent, compared with a rate of 5 percent in the district).

But the numbers that matter, the teacher and student retention rates, are promising: Brooke loses only about 5 percent of its students per year, and the teacher retention rate fluctuates between 80 and 90 percent. About a fourth of the teachers who leave are asked to leave.

The most important commonality between Brooke and other top charters: a shared pedigree. Brooke falls neatly into the genetic history I've outlined in *The Founders*. Clark got his start with Teach For America in New Orleans and then moved back to his hometown of Boston to work as a founding teacher at Boston Collegiate, which

was then run by Brett Peiser, now the CEO of Uncommon Schools.

In the world of high-performing charter schools, the seminal startups are thought of as the original KIPP school in Houston, the Aspire charter management organization in California, Achievement First's Amistad Academy in Hartford, Boston's Roxbury Prep and Newark's North Star. Far less known is Boston Collegiate, despite the fact that this school spun off as many future charter leaders as the more-discussed schools, if not more.

Scott Given, a former Boston Collegiate teacher, left to become the principal of Excel Academy before leaving that to found and run UP Education in Massachusetts, one of the only organizations leading in-district turnarounds. Sue Walsh, who plays a top role at Boston's Building Excellent Schools, served as a principal at Boston Collegiate.

Asked to compare the relative historical value of schools such as Roxbury Prep and Boston Collegiate, Clark just laughs. "I think you'd have to sit down for a late-night bar argument over which school produced the most talented next-generation leaders."

Brooke's culture is firmly rooted in the culture pioneered by Peiser and others at Boston Collegiate. In fact, Peiser wrote Brooke's original charter. Then, Peiser asked Clark, his star math teacher, to run the new charter while he left to start new Uncommon schools in his hometown of New York City.

At the time, Clark had no management experience, but he essentially got "adopted" by Peiser, Norman Atkins and their band of fellow charter pioneers, especially Dacia Toll and Doug McCurry from Achievement First, who met often with Atkins. "I remember going to

those early conversations," said Clark. "I was like the little kid they let tag along." Clark also visited Atkins's North Star school, where he remembers watching legendary North Star teacher Julie Jackson and co-founder Jamey Verrilli in action. "I was blown away."

Thus, Brooke fits neatly into the narrative thread of *The Founders*. Just a slightly different branch off the common tree.

As for the question about which of these schools, Brooke, Summit, Greenfield or Hybrid High, best represent next-generation charters. The obvious answer: all. Intense innovation guarantees that 3.0 charters will never look exactly alike.

Part Four

The Path to 10,000 Schools

A morning Community Circle at North Star Academy

— courtesy of Uncommon Schools

The Three *Challenges*

A blissful expansion of
top charters? Not so fast.

Washington, D.C.
2016

Chapter 19

Do all these success stories mean that high-performing charters will soon show up in every city?

Not at all. There are three blunt realities that need a full airing.

First, any reader looking at the photos and studying the resumes that accompany these stories can't help but notice that the first wave of charter pioneers is nearly all white with excellent college credentials. Brown University appears to play a special role here, especially with Uncommon leaders (full disclosure: my wife and youngest daughter are Brown graduates, and my daughter works in the charter sphere).

Given that the targeted school population for charters is almost all low-income minorities, the contrast seen during school visits can be startling: black and brown students who are taught by white teachers. This is a race reality that's rapidly shifting as charters diversify, but will it shift fast enough to avoid the pushback that's already bubbling up around the race issue?

Next, we have to be real about where these high performers can actually take root. Their performance is tightly connected to their ability to attract talented teachers, and in a lot of cities, that just isn't going to happen. Plus, the powerful anti-charter movement led by unions and superintendents is fully capable of blocking charters in some cities.

Finally, and probably most significantly, the top charters will be held back until hundreds of poorly performing charters get shut down. Let's start with that one:

Low performers allowed to linger

This is the biggest failure of the charter school movement, and no one saw it coming.

The assumption that bad schools would close as better ones opened looked great on paper but fell apart in real life. What wasn't predicted was the reluctance to close bad charters. As it turns out, charter parents cling to their failing schools just as closely as parents of traditional failing schools. Thus, the danger comes from within – the hundreds of mediocre, struggling or just flat-out awful charter schools that authorizers allow to stay open.

It is no accident that some of the biggest supporters of charter schools are the most alarmed by the failure to shutter low performing charter schools. James Merriman from the New York City Charter

School Center recently pleaded with charter operators to acknowledge the unique agreement into which charters entered: "Charter schools are free from a lot of the bureaucracy that entangles district schools. That's autonomy, and it's key to charter success. But that freedom isn't free. It comes at a high price: accountability," wrote Merriman. "Unfortunately, this is a lesson that needs to be relearned by some of my allies in the education reform movement who champion these independently run public schools."

Too often, said Merriman, low-performing charters fight legal battles with their authorizers to stay open – a betrayal of the trade-off that charters agreed to: freedom in exchange for accountability. "Without the penalty of closure, charter schools, which often succeed with students when the district often doesn't, simply don't make sense. For charter schools to do the hard work of getting students educated, they need both autonomy and accountability."

Why are bad charters allowed to persist? Weak laws are the biggest culprit, followed by operators who are chummy with authorizers, followed by inertia. And then you have authorizers rationalizing that the least crummy charter schools are safer than the alternative. Who in Florida thought that allowing scores of for-profit charters was a good idea? And a question for authorizers everywhere: Who thought that allowing scores of online charters was worth a go? That's just a starter list to answer the "why" question.

Until there's a very real crackdown on bad charters – well beyond the recent push to get tough with troubled online charters – we should expect charters in the top 20 percent to be viewed cautiously as well. This is a problem that calls for solutions that range from

setting firmer charter laws to eliminating conflicts of interest among authorizers who lack incentives to close bad charters. Will it happen? It already is, with cities such as Washington, D.C., showing that great accountability leads to great charters. That's also happening nationally, but at a far slower pace, unfortunately. There are talented people pushing hard on the quality-versus-quantity issue, including Nina Rees from the National Alliance for Public Charter Schools.

The biggest player in the campaign to close bad charters is Greg Richmond from the National Association of Charter School Authorizers. His group's One Million Lives program aims to open up high-performing charter seats for one million additional students – a strategy that leans heavily on closing the bad charters. This is important work: The "elite" charter groups you've read about in this book can never expand fast enough to meet the need, which means new high performers have to be groomed at the local level. Picking those future winners all comes down to great authorizing. Richmond and his association are making progress.

Much of the reason for the strengthening charter performance between 2009 and 2013, concluded the Center for Research on Education Outcomes, was the closures of poorly performing charters. One more data point: Between 2014 and 2015, the number of charter shutdowns rose from 223 to 272.

There's progress. But is it fast enough?

Chasing elusive talent while evading critics

I was struck by what Ednovate's Oliver Sicat told me about trying to expand his charter group in Los Angeles, where resistance from the union and district has become intense. L.A. may be hostile, said Sicat, but it's talent rich, and that counts far more for charters that rely on recruiting top talent. "Until our model becomes less dependent on top talent, I'd rather do a tough political fight and get into a high-density-talent environment than just go to a place where it's more politically viable but a low-talent environment."

That has always been the challenge in the big charter experiment in Memphis, a city that one charter expert diplomatically referred to as a "low-resource" city. The talent question also seems to favor the larger CMOs over the one- or two-school clusters. Although there are plenty of great charters with only one or two schools, a large CMO will find it easier to attract top talent and then aggregate that talent, said Kevin Hall, CEO of the Charter School Growth Fund. A charter group with 20 schools and 10,000 students, said Hall, offers a better platform for nurturing a fast-learning and improving curve.

There are strategies to draw the best charter operations into cities, as the National Alliance for Public Charter Schools lays out. And there are places that definitely qualify as "low resource": the Rio Grande Valley, for example, where IDEA charters have flourished. But these places may prove to be the exception. Just as the Walton

Family Foundation illustrated as it pruned the list of grant cities, not all cities will prove to be fertile grounds for these schools. What's happening in Washington, D.C., and San Antonio won't be happening in Milwaukee. Sometimes the reason is political opposition; sometimes it's because a low-resource city is not poised to produce the teaching talent that's needed.

Here's the real issue about talent: In the future, the challenge of finding great teachers is only going to worsen. And that affects all charters, including the top performers.

Talent isn't the only roadblock; there's also the charter pushback movement. In Massachusetts, for example, home to the highest-performing charters in the country, success has not inoculated charters from their critics: unions, competition-wary superintendents and progressive Democrats. The unions certainly aren't going to give up the fight.

There are possible compromises with these critics, as Greg Richmond lays out. Paul Reville, former Secretary of Education in Massachusetts, offers suggestions, as does Paul Hill from the Center on Reinventing Public Education. And the group Third Way gives similar advice. Union-supported groups such as New York's New Visions offer solutions that straddle charter and district schools. Frankly, however, I don't see any truce on the horizon. Most threatening to these critics are the charters described in this book, the top 20 percent. Those are the charters most likely to take and retain their students; those are the charters that step on their poverty-explains-all explanation for low-performing schools.

How bad can the fight get? Really bad if the pushback forces

succeed in drawing in white, middle-class, suburban parents by convincing them that charters drain money from their high-functioning schools. I wouldn't bet against that happening – it's exactly what happened with the testing issue. The white suburban opt-outers have a point: Those basic skills tests do nothing for their college-bound kids. They only get in the way. That's true, and it's true with charters as well. What do Brooke charters in Boston offer suburban parents in Newton? Absolutely nothing, unless they care about the future of Boston. That leaves me fearful of the upcoming referendum on charter expansion in Massachusetts. Brooke, for example, needs one more middle school to feed into its high school. Will that happen? Maybe, but the odds are dicey. Understandably, parents are going to vote in their self-interest.

But it is easy to become overly paranoid about the damage charter critics can inflict: After all, if the goal of the teachers unions has been to stop the spread of top charters, then that campaign would have to be considered a failure. In states such as Massachusetts, the best the unions can hope for is to keep the current cap on the number of charters.

Union leaders face tough choices in their battle to stall charter growth. Their most effective strategy – working with superintendents to create far more high-performing traditional schools that would lure parents away from charters – might require dramatic changes to teachers' contracts that unions have spent decades winning.

Plus, this awkward question has to be raised: Are the top charters pulling away? In the 2016 "America's Most Challenging High Schools" list published by *The Washington Post* – a listing that

seeks out high schools offering challenging curricula to students who wouldn't normally be challenged that way – a third of the top 100 schools were charters. On the *U.S. News and World Report* survey that came out at the same time, which considers excellence only on a best-of basis regardless of the student population, charter schools made up two of the top five, with the top traditional schools limited to entrance-exam-based schools for gifted and talented students. More than a third of the top 100 high schools were charters.

In battleground city Los Angeles, an intense campaign by state charter advocates to weed out low-performing charters and promote the best appears to be having an impact, with the charters outperforming comparable district schools and getting more poor and minority students admitted to top state universities. The same can be said about New York City, where former chancellor Joel Klein made sure from the beginning that only the best were invited.

Union opposition to charters, especially the top charters, is unlikely to fade, as Hillary Clinton discovered in July 2016, when she spoke before the National Education Association and suggested there are some lessons worth learning from the high-performing charters. She got booed. But in truth, the key decisions about charter growth will continue to get made at the community level, and the real drivers will continue to be parents seeking better schools. When will parents cease to be interested in better schools for their kids? No time soon, I'm betting. Consider New York's ultra-high-performing Success Academies, which in 2015 came under seemingly coordinated attacks by politicians, press and unions, with charges ranging from pushing out "bad" kids to screaming at helpless kids. Normally, attacks

that intense would drive parents away. But in fact, the wait lists for Success schools remained roughly stable.

Another player here, one that it is too soon to measure, is the growing political power of charter school parents. We saw them rally in New York, and now we see them banding together as voters in Newark. The same phenomenon played out in 2015 in Los Angeles when charter co-founder Ref Rodriguez prevailed over an incumbent anti-charter school board member with close union ties.

My guess: For each instance where school district leaders and unions succeed in stopping a high-performing charter, there will be two instances where expansion gets approved and/or district leaders and charters agree to some form of collaboration. It's all about necessity.

More teachers who look like their students

For the most part, especially inside elite charter schools, the students and teachers don't look alike, and that escapes the attention of exactly no one. It's one reason charters in Newark, despite the fact that they greatly outperform Newark neighborhood schools, remain the target of effective whispering campaigns that charters are the leading edge of a movement to reclaim Newark for white folks.

The stark race gap between students and charter staff is a concern on multiple levels. Is it important to see people of your race/ethnicity/gender standing in front of the classroom? Here's

how Teach For America, which for years has been a major supplier of teachers to top charters, comes down on that: "We believe that committed, talented individuals, whether they come from privilege or not, can be powerful classroom leaders," said TFA spokesperson Sharise Johnson. "We also believe that teachers who share the background of their students can have a profound additional impact. This belief is grounded in all that we've seen in the field, and emerging research on how and why students benefit from teachers with whom they share a background."

TFA, which has long drawn criticism for sending too many white teachers into all-minority schools, has moved fast to diversify: In 2009, said Johnson, 9 percent of the corps identified as African-American; today, 20 percent do (nationally, that figure is 7 percent for traditional schools). In 2011, 8 percent of the corps was Latino; by 2016, that number doubled.

Teach For America diversity statistics
— *courtesy of TFA*

"We're one of the largest single providers of teachers of color in the country, and roughly half of all this year's corps members identify as people of color," said Johnson. "And diversity among our corps members becomes diversity among our alumni leaders. Eighteen out of about 100 Teach For America alumni holding elected office today are Latino; 8 percent of our policy, advocacy and organizing leaders identify as AAPI [Asian Americans/Pacific Islanders]; and 16 percent of our alumni school leaders are black."

That's a fast transition, but matters of race in America are rarely that simple. Regardless of race, new charter teachers or TFAers entering traditional district schools in cities such as Washington, D.C., Newark, Chicago and New Orleans are often seen as replacing older teachers from the neighborhood, which then saps the neighborhood of important economic assets. Usually, those actions happen because the older teachers weren't viewed as getting results.

Former Milwaukee superintendent Howard Fuller, a longtime school reform advocate and founder of Black Alliance for Educational Options, is not surprised by the controversy that generates. From the perspective of many in the black community, said Fuller, education reform has meant black schools getting closed and black teachers getting fired.

"The long-term sustainability of this is not possible unless we have a conversation with our veteran teachers about how to get better. It's one thing to say they are not getting results; it's another to conclude they have no value and can't acquire new skills."

In big cities, schools are about far more than educating kids, Fuller points out. "A lot of people see school [jobs] as an entry to the

middle class. When a lot of these people lose jobs, many in the black community view this as an attack on black economic value and black power." There's a reason Dale Russakoff's book about Newark school politics was named *The Prize* – "the prize" was the jobs generated by Newark schools, the jobs that kept so many in the middle class. Where else was employment to be found?

That was clearly a huge issue in Washington, D.C., where black voters felt education reform was something being done *to* them (and by a Korean-American woman, Michelle Rhee) and not being done *with* them. So they voted out the mayor who made schools better, Adrian Fenty, which got Rhee ejected as well – all documented in my book *The Bee Eater*.

A similar phenomenon is obvious in Newark, where Ras Baraka got elected mayor in part because of his opposition to charters. And yet the Newark charters, which by any measure are outperforming Newark public schools, continue to draw long wait lists for their schools.

"It's an irony," said Fuller. "People who are trying to find a better education will continue putting their kids into charters, but they will continue to vote for people who oppose those schools." That's because the charters, led for the most part by whites, never felt like homegrown school reforms. And longtime Newark residents have seen too many neighbors lose their jobs.

In late May 2016 that tension within the school reform movement boiled over with the Fordham Institute's publishing of an essay by Robert Pondiscio: "The Left's drive to push conservatives out of the school reform movement." Pondiscio wrote that a social justice

agenda prevailed at the annual NewSchools Venture Fund meeting in San Francisco.

"Like the proverbial frog in a pot, education reformers on the political right find themselves coming to a slow boil in the cauldron of social justice activism. At meetings like NewSchools Venture Fund and Pahara (a leadership development program run by the Aspen Institute), conservative reformers report feeling unwelcome, uncomfortable, and cowed into silence. There is an unmistakable and increasingly aggressive orthodoxy in mainstream education reform thought regarding issues of race, class, and gender. And it does not include conservative ideas."

Conservatives, Pondiscio reported, are left wondering: When are we going to talk about better schools? Roughly defined, the two sides of the argument were cast as: equity versus markets.

This is no minor issue, given the increasing focus of the school reform movement on charters. (The fierce and often successful pushbacks against Common Core, realistic teacher evaluations and data-driven accountability within traditional districts have left charters as the best reform option.) It is hard to name a state legislature where the survival of charter schools

"People who are trying to find a better education will continue putting their kids into charter schools, but they continue to vote for people who oppose those schools."

doesn't hinge on a fragile coalition of traditional liberals teaming up with conservatives to fend off anti-charter attacks from progressives, unions and powerful school superintendents.

If conservatives pull back, that coalition crumbles. It's really that brutal.

One obvious compromise is to pioneer more charter schools run by minorities, thus marrying the interests of the two parties: better school options and school reform that's more reflective of local communities.

That pretty much defines the "Emerging CMO Fund" at the Charter School Growth Fund overseen by Darryl Cobb, the former chief learning officer at the KIPP Foundation. Cobb still recalls the day in the fall of 2002 when he looked over the crowd gathered for a Growth Fund meeting in Seattle: nearly all the attendees were white, a sharp contrast to the students in the schools funded by the Growth Fund, who are nearly all minority.

"That was the spark of an idea," said Cobb, who worked with Fund President Kevin Hall to create a separate charter fund for up-and-coming minority charter leaders. The guiding principle: There are plenty of highly successful minority charter leaders who rarely dream of expanding beyond one school because they lack the financing and/or connections to a larger network that could help with crucial resources such as finding top teachers.

The action plan: Find those leaders and encourage them to expand.

By 2016 the Growth Fund invested $4.5 million into nine charter startups (including Achievement Prep, whose Shantelle Wright

was profiled in the earlier chapter about Building Excellent Schools). In June 2016, the Fund nominated five more for funding.

What's often different about these charter operators is their closeness to the local community. Cobb cites Charlene Reid from the Bronx Charter School for Excellence, one of the first charters included in the Fund. "Charlene was doing her thing in the Bronx and, frankly, outperforming a lot of the big-name charters in New York."

Cobb's strongest memory from an early visit: "She was uniquely part of her community. When you walked between her two buildings, she spoke to, and knew, everyone along that path, including some people you wonder how she knew them."

The Growth Fund helped Reid open a second school in Stamford, Connecticut, and win approval to open a second school in the Bronx.

Those close community ties were evident in the spring of 2016 when I visited Equitas Academy Charter Schools in Los Angeles, another recipient of funding from the Emerging Fund. Founder Malka Borrego grew up in the Pico-Union neighborhood, where her schools are located, raised by a father who drove a bread delivery truck through those streets. Today she has 850 elementary and middle school students in her schools, which are some of the most successful in Los Angeles. It takes just three years for Borrego's students (80 percent of them English-language learners when they arrive in kindergarten) to catch up to the state average of white students in California.

Borrego's dream, which might get an assist from the Fund, is to open a high school so her middle school students have a school

option other than the traditional high school, which has a depressingly bad record in preparing students to qualify for admission to the state university system.

There are a couple of good charter high schools in the area, including another charter in the Growth Fund's Emerging portfolio, STEM Preparatory Schools, run by Emilio Pack. But the wait lists are long. Borrego is worried about all her students, including her 5-year-old daughter, who is starting school at Equitas. What will they do after middle school? "I don't think there are enough quality options to provide our students with a consistent pathway to college."

Other charters on the Emerging list: Capital Preparatory Schools in Hartford and New York City, Fortune School in Sacramento,

Emilio Pack, who runs STEM Preparatory Schools, is supported by the Charter School Growth Fund
— *photo by Richard Whitmire*

Henderson Collegiate in Henderson, N.C., and Voices College-Bound Language Academies in California's Santa Clara County.

Addressing race in America is never easy. And it's especially tricky with charter schools, even the elite charters. Helping charter operators such as Charlene Reid and Malka Borrego expand can't be the only solution, but it seems like a good place to start.

Conclusion

The baton gets passed –
then passed again

June 2016

It's possible that readers will reach this conclusion and ask:

Wait, where's the profile of important charter entrepreneurs such as Chris Barbic and his YES Prep schools, a finalist for the 2016 Broad Prize for Public Charter Schools? Where's a profile of Teach For America, which provides many of the great teachers that fuel these charters? Why no stories from New Orleans, where charters have turned around what had to be one of the worst school districts in America? Where's the history of Mastery Charter Schools? What about Arne Duncan's Race to the Top that "lured" states into opening up more high-performing charter schools?

True, those elements are missing from this narrative. This is a history of relationships, not a history of every top charter and certainly not a policy book. That would require multiple books. I also realize my focus is mostly on what some charter insiders dub "the cool kids," the high fliers such as Uncommon, KIPP, Achievement

First and Aspire.

I tried to write this history the way Don Shalvey suggested it; it's all about relationships, and most of those relationships arose among the cool-kid charters. It's all about Shalvey sharing his CMO ideas with other charter leaders. Don – as in @doowopdon – hears music accompanying this sharing story. I'm not so talented in that way, but I do see the baton handoffs. It's all about Kim Smith and NewSchools passing along their radical funding idea for disrupting education. It's all about Mike Feinberg and Dave Levin sharing their powerful teaching lessons that grew out of their first teaching experience in Houston. It's all about Norman Atkins opening his Newark North Star Academy to all comers. It's all about Doug Lemov documenting the teaching lessons learned in *Teach Like a Champion*.

Harriet Ball may have been Teacher Zero for passing along her teaching techniques to Dave Levin, but Norman Atkins has been Sharer Zero for both sharing and connecting people. One example among many: People know that Doug McCurry and Dacia Toll co-founded Achievement First, but here's something few know: Atkins first interviewed McCurry and connected him with Toll to help launch their first charter.

I dove into more detail about Uncommon Schools because I wanted to go deeper on just one charter group whose leaders not only shared with other charter leaders but now push their original goals more broadly. Norman Atkins is the co-founder of Relay Graduate School of Education, which trains for both charter and traditional schools. Doug Lemov's book reaches thousands of traditional school teachers. Evan Rudall's Zearn software is for all school children, not

just charter students. Brett Peiser oversees an innovative and successful charter/district collaboration in New York.

From the beginning, these leaders understood that high performing charters would never reach more than a fraction of the students who need them, and so they pursued larger strategies.

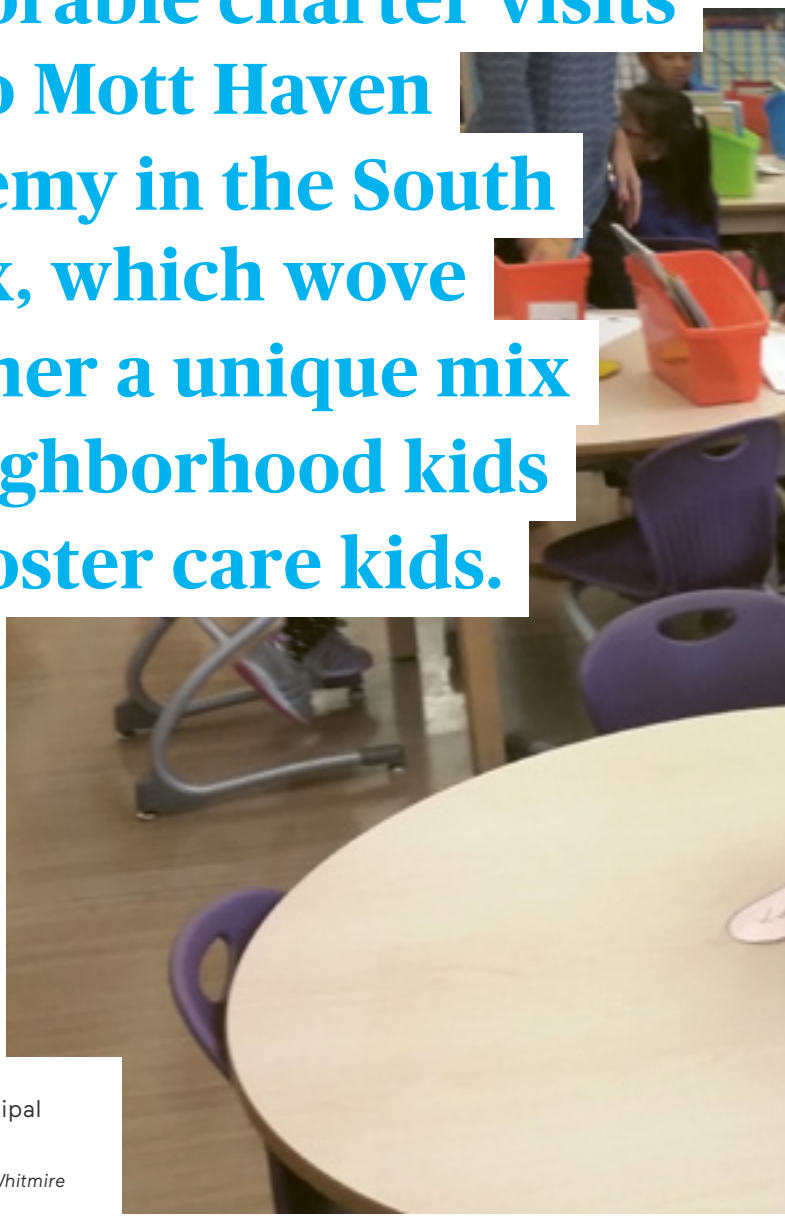
Uncommon is hardly alone. Schoolzilla, an online data platform, arose from Aspire Public Schools. LearnZillion, a library of interactive math and language lessons, arose out of E.L. Haynes charter schools in Washington, D.C.

Given today's hyper-competitive world, what's striking about these relationships is how unselfish they are.

Those early pioneers inspired the follow-on charter entrepreneurs, such as Oliver Sicat at L.A.'s USC Hybrid High and Jon Clark at Boston's Brooke Charter Schools, to invent ever more effective schools. Clark runs what are arguably the nation's highest-performing charters, but he doesn't think of himself as a charter pioneer. He just learned from the best, especially the Uncommon founders. And yet his schools barely resemble Uncommon schools.

Given today's hyper-competitive world, what's striking about these relationships is how unselfish they are. In theory, the New York schools run by Uncommon and KIPP compete for students with Achievement First. But when Achievement First co-founder Dacia Toll asked the KIPP and Uncommon chiefs about entering the New York market, she recalls the answer as: Sure, it will be fun!

One of my most memorable charter visits was to Mott Haven Academy in the South Bronx, which wove together a unique mix of neighborhood kids and foster care kids.



Mott Haven Principal Jessica Nauiokas
— photo by Richard Whitmire


Ariel

Steve Barr from Green Dot gave away his charter model to anyone who asked, as do other charter leaders. Visits? Top charters have so many visitors from other aspiring charter leaders that at times their schools resemble hotels. When I was reporting on Rocketship charters, co-founders John Danner and Preston Smith had so many requests to see their edgy blended learning model that they finally had to set aside only some days of the week for visitors. Don Shalvey has acted as a mentor to so many would-be charter launchers, I'm assuming he has lost track.

Some might expect Summit's Diane Tavenner to tout her new Basecamp software as the model all schools should be using. Instead, she cautions that there is no one model, just iterations of models in a continuous improvement cycle. That's how Silicon Valley innovators view innovation. I think they're mostly right.

The result of this cross-fertilization and continuous improvement is *The Founders*, latticed networks of high-performing charters, roughly the top 20 percent of all charters, that are re-imagining what success looks like at high-poverty schools.

In cities such as Denver, which are fertile grounds, the cross fertilization between charters and traditional schools will only intensify. Most promising to me is the potential of specialty charters that focus on a unique function, such as teaching autistic children. One of my most memorable charter visits was to Mott Haven Academy in the South Bronx, which wove together a unique mix of neighborhood kids and foster care kids. Who could have predicted that would work? But it is definitely working, and it should be a model adopted nationally by foster care advocates. On a pragmatic level, the specialty charters

are the schools most likely to win approval from school districts wary of approving charters that compete with their own schools.

Charters that figure out ways to enroll a diverse group of students, such as Rhode Island's Blackstone schools, also offer promise. And the capability to turn around an entire failing school, a feat once ducked by most charters, may well define the future. I offer you Newark's North Star Academy Alexander Street Elementary School as a model for the future.

The reason I'm hopeful these charters will reach more students, despite the drag of hundreds of bad charters, is a simple driver: necessity. Consider one city: Indianapolis, where Superintendent Lewis Ferebee has embraced charters as part of his aggressive improvement campaign. Said Ferebee to *Education Week*: "There's this idea that you have to be on one side or the other – you can't wave both flags. The more we encourage people to wave both flags, the more effective we will be in educating our children."

In spite of all the legal fights in Washington State over allowing charters to open up there, Spokane is emerging as an island of reason, a district willing to work with charters.

In short, it's all about necessity.

Or consider New York City's District 23 superintendent, Mauriciere de Govia, who told me why she agreed to collaborate with Uncommon despite the views of some that collaboration amounts to consorting with the enemy. Her students live in the high-poverty Brownsville section of Brooklyn, and Uncommon appears to be succeeding where many of her schools haven't. "They not only have the tools, but they have the evidence. You can't ignore that."

Again, necessity is the driver. And sharing is what made the top charters so necessary.

As Shalvey put it, sharing has become a value that gets passed along around the "campfires" of every charter school gathering.

Acknowledgments

As stated in the beginning pages, the idea for this book arose with Don Shalvey. This is history that needs getting down and preserved, he said – and I agreed, especially since this is also a history that leads into the future.

One surprise in reporting this book: The nation's top charter groups lack written histories. At most, they offer a few paragraphs on a website. Perhaps that's because they are all relatively young and desperately busy. Who has time for histories? But all the charter founders found time to endure my detailed questions and track down old photographs of their first school launches. No one likes to be pressed on exact dates from long ago, but they did their best. A special thanks to Norman Atkins, who endured double interviews for both Uncommon Schools and Relay Graduate School of Education.

Julie Peterson was incredibly thorough in providing documents and photos about the early years of NewSchools Venture Fund.

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This work began while I was a fellow at the Emerson Collective and continued as part of my current fellowship with the Ewing Marion Kauffman Foundation. Without that support, this book would not have emerged for a very long time, if ever.

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And I must acknowledge my wife, Robin Gradison, who once again patiently tolerated my book-obsessive behavior as the final deadline approached.

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About The 74

The 74 is a non-profit, non-partisan education news organization founded in 2014 by award-winning broadcast journalist Campbell Brown and former New York City schools official Romy Drucker.

As of 2016, The 74 had expanded to three bureaus in New York, Los Angeles and Washington, D.C., and currently operates two daily news websites: the nationally focused The74million.org and Los Angeles's LASchoolReport.com. The outlet's roster of contributors – which includes Pulitzer Prize-winning columnist Cynthia Tucker Haynes, former *USA Today* editorial writer Richard Whitmire, and former *TIME* Assistant Managing Editor Steve Snyder – was recognized as an official honoree at the 2016 Webby Awards for best editorial writing on the Internet. The 74 also hosted the 2015 New Hampshire Education Summit, which brought together top presidential candidates for an extended discussion about America's schools, and became a national trending topic and livestream on social media.

Sign up for news updates at The74Million.org/Newsletter, and watch exclusive interviews with the band of reformers profiled in this book at The74Million.org/TheFounders.