



Greetings from the Youth Strategy Project of the DataCenter!

Working with so many youth organizations around the nation doing educational justice work on the local level, YSP has been observing common patterns of school reforms on the national level. Folks already know high school exit exams and school takeovers aren't just happening on a local/state level but on a national and even federal level; the Bush Administration's No Child Left Behind Act recommends state takeovers as a solution to low-performing (majority people of color) schools and other means of dismantling public education. The educational reformists behind these recent trends are ten steps ahead of us and certainly don't listen to community voices. Folks doing work on the ground know this, but for the most part, most orgs don't have the capacity to get into it.

With this in mind, YSP is conducting a series of in-depth research on national educational trends to build basic awareness & understanding on these issues, but also to hopefully help folks to identify targets, strategy & tactics for your local campaigns and to make those national connections.

Attached is our first attempt at looking at school takeovers in California. This is specific to Oakland, but is deeply connected to larger national educational trends of incapacitating public education and disenfranchising poor and people of color communities. The majority of urban school districts throughout the nation already have had mayoral takeovers at the very least (including Chicago, Boston, Baltimore, DC and New York). And an influential liberal-minded education reform foundation (The Broad Foundation) and proponent of takeovers has successfully placed superintendents in major urban school districts throughout the nation.

As in Portland, OR and other cities, school reform is deeply linked to politics and economics. Gentrification in Oakland under Mayor Jerry Brown's 10K scheme is leading to the forced relocation of working class families and dropping attendance rates in the schools--costing Oakland Unified School District some \$15 million a year. The decline in revenues along with administrative incompetence has led to the mayoral and now state takeover of OUSD. Consolidation of students and school closures may follow; opening the way for the sale of public lands to developers and the further disenfranchisement of our communities. Already, pro-development Senator Don Perata is urging the district to sell its headquarters in the prime Waterfront area (valued at \$30 million) to offset the record \$100 million bailout debt that he had a direct hand in orchestrating.

The fallout of the Oakland debacle--in which the Mayor, the Senator and the State Superintendent all collaborated with FCMAT (powerful Calif state agency managing schools finances & takeovers unchecked) to force takeover--has the FCMAT ordered to a Congressional audit for the first time in its 12-yr history.

This research release is on the text-heavy side of things but in the near future, we'll release a companion visual power map and make it more youth-friendly. The hyperlinks in the document all work; clicking on them should open a new window in your internet browser.

upcoming research releases:

- Focus on FCMAT & its private consultants (School Services Inc, etc.)
- Mapping the national landscape of educational reform thinktanks (incl. Pioneer Institute, American Diploma Project, Broad Foundation, and state Business Roundtables)
- analysis of the No Child Left Behind Act

we welcome your feedback on our research & presentation, suggestions for what educational issues or trends you need research on the most and would love to hear how you're using this research release. please email ysp@datacenter.org.

peace & respect,
ly-huong nguyen & terry marshall
youth strategy project
DataCenter



CHRONOLOGY OF CALIFORNIA SCHOOL DISTRICT TAKEOVERS

bold—school districts **blue**—legislation & legal superintendents **green**—elected & public official & **orange**—state takeover agents **fuschia**—education reform agency

School Takeovers are characterized by neo-liberal corporate business models, top-down centralized leadership, standardized testing as a cure-all for poor academic performance, privatization of services (non-union), the circumvention of democratic process (elected school boards are judged unfit & corrupt), the failure to address root causes and the disenfranchisement of local communities' voices under the guise of efficiency, fiscal solvency and non-partisan/non-special interest decision making. "[In 1998] An *Education Week* survey of 21 districts that have ceded power to mayors or state agencies ... found that all but three have predominantly minority enrollments, and most are at least 80 percent nonwhite. Of eight districts that have been threatened with takeovers, all but two have populations that are predominantly minority, and three are at least 93% nonwhite."¹

City or Mayoral Takeover—"a school reform strategy in which a state gives the mayor the power to appoint a majority of the city's school board members."² Mayoral takeover has happened in Boston, Chicago, Cleveland, D.C., New York, Philadelphia, Detroit, Baltimore, St. Louis and Oakland.³

State Takeover—"either the state legislature, the state board of education or a federal court charges the state department of education or another designated entity with managing a school district, usually for a certain amount of time."⁴ In California, the **State Superintendent of Public Instruction (SPI)** appoints an administrator and designates the **FCMAT** (Financial Crisis & Management Assistance Team) as the state fiscal agency that take over a school district. CA school districts taken over by **SPI & FCMAT: Compton Unified** (1997-2001), **Emery Unified** (2001-2003), **West Fresno Elementary** (2003-2004), and **Oakland Unified** (2003-2005). CA school districts that are monitored by **FCMAT: San Francisco Unified** (1999-2000), **West Contra Costa County Unified** (2000-2005), and **Berkeley Unified** (2002-05).⁵

FCMAT's 5 areas of District Operations: Governance/Community Relations, Facilities Management, Pupil Achievement; Financial Management & Personnel Management.

¹ Beth Reinhard, "Racial issues cloud state takeovers" *Education Week* 1/14/98.

² Francis Shen, "Political incentives and mayoral takeover of urban school districts" School Board Politics Conference Program on Education Policy & Governance, Harvard University, October 15-17, 2003. http://www.people.fas.harvard.edu/~fxshen/FrancisShenTakeoverPoliticalIncentives_AERA2003.pdf

³ Kenneth Wong & Francis Shen, "When mayors lead urban schools: toward developing a framework to assess the effects of mayoral takeover of urban districts" *School Board Politics Conference*—Program on Education Policy & Governance, Harvard University Oct 15-17, 2003. http://www.people.fas.harvard.edu/~fxshen/Wong&Shen_PEPG_SchoolBoardsConference.pdf

⁴ Todd Ziebarth, "Policy brief: State Takeovers and Reconstitutions" *ECS National Center on Governing America's Schools* completed July 1998, updated April 2002. <http://www.ecs.org/clearinghouse/13/59/1359.htm>

⁵ FCMAT Comprehensive Assessments, Recovery Plans, and Special Legislative Assignments. [http://www.fcmat.org/stories/storyReader\\$951](http://www.fcmat.org/stories/storyReader$951)

- 1978 **Prop 13** written by a landlord attorney passes and is signed into law by **Governor Jerry Brown**. Prop 13 “put a cap on property taxes and shifted responsibility for collecting and allocating tax money from local governments to the state [preventing] local communities’ ability to adequately take care for their citizens. By cutting revenues, Prop 13 crippled state public education, cutting school funding in half overnight, and consequently, California has gone from being among the top five states in the national to among the bottom ten in per-pupil education spending.”⁶
- 1988 Pike County (KY) and Bridgeport (CT) School Districts are among the first in the nation to have state takeovers for financial problems.
- 1991 Boston became the first large city district to have its elected school board abolished in a mayoral takeover.⁷
- 1991 **West Contra Costa County Unified** (fka Richmond Unified School District) goes bankrupt prompting the first CA state takeover. **SPI** appoints an administrator to run the district. State removes administrator in 1992 and designates a trustee to monitor district’s financial performance.⁸
- 1991 California bill **AB 1200 (Delaine Eastlin** D-Fremont 1986-1994; former **SPI** from 1994-2002) creates **FCMAT** to manage takeovers. see sidebar
- 1992 State takeover of **Coachella Unified School District** (Palm Springs, CA) due to financial problems. **SPI** appoints an administrator. State removes administrator in 1996 and designates a trustee to monitor district’s financial performance.⁹
- 1993 July—California bill **AB 657 (Williard Murray** D-Compton 1988-1996) Chapter 455, Statutes of 1993 [Compton Unified School District] authorizes the state takeover of **Compton Unified School District**. It is the nation’s first state takeover for academic and financial bankruptcy. **CUSD** takes a state loan of \$10.5 million, a state administrator is appointed by the **SPI** and the locally

Financial Crisis & Management Assistance Team

FCMAT provides fiscal advice, management assistance, training and other related school business services for CA educational agencies. It operates from the office of the Kern County Superintendent of Schools under what has become a no-bid contract with the California Department of Education and the governor’s office. FCMAT hires private consultants such as School Services Inc. through no-bid contracts. Its budget in 1992-93 was \$562,000. Its budget in 2001-02 was \$35.6 million. Currently, FCMAT has no public accountability whatsoever. “A clause in the law [inserted by political ally CA Department of Finance] prohibits the state Superintendent of Public Instruction and the Department of Education from closely examining FCMAT’s finances.”

*Robert Gammon, “Little-known agency holds schools’ fate; State hires consultants with no-bid contracts that undergo little scrutiny yet shape children’s future.” *Oakland Tribune* 6/29/2003.

⁶ F.T. Salazar, “Crony profits prioritized over children’s education” *The Commentator* 8/27/2003. <http://sf.indymedia.org/news/2003/08/1638244.php>

⁷ K. Wong & Francis Shen, *ibid.* 2003.

⁸ Ziebarth *ibid.*

⁹ Ziebarth *ibid.*

- elected **school board** is stripped of power.¹⁰
- 1993 fall—**AB 33** & **AB 1708** (both **Murray**) authorized **SPI** to determine when **CUSD** could be returned to local control and appropriated another \$9.45 million emergency loan respectively.
- 1996 **SPI Eastin** & **FCMAT** appoints **Dr. Randolph E. Ward** as the 5th **CUSD** state-appointed administrator.
- 1997 State legislature passed **AB 52** (**Carl Washington** D-Paramount in Compton) that requires takeover to address inadequate student performance within the school district and brought **FCMAT** into **CUSD**. (Cal. Ed Code § 52055.5)
- 1997 **ACLU Fdtn of So Cal** filed a class action suit [**Serna v. Eastin**] against **SPI Eastin** for mismanagement of **CUSD** and failure to provide adequate education and a safe environment (facilities & materials) for students. The suit was settled out of court by *consent decree* in 2000. It is the first case in which a court has ordered the state to provide students within a particular district with an education equal to that offered elsewhere statewide. **FCMAT** is authorized to do progress reports every 6-months to the present date.¹¹ A string of other lawsuits target the “state occupation” of Compton and **Ward** as its agent.
- 1997 **Carole Quan** is hired as **OUSD** Superintendent. Her tenure saw the ebonics controversy, raised academic performance, decreased dropout rates, some of the highest graduation rates in the state, and increased pace in building repair. **Senator Don Perata** (D-9th District Oakland) and **Paul Cobb** targeted her for removal in the media.¹²
- 1998 **Mayor Jerry Brown** is elected mayor. Opportunistic backstabbing of poor POC communities and the reign of the “strong mayor” commences. Jerry reveals his 10K gentrification plot to attract 10,000 new middle-class residents to downtown Oakland and supports charter and magnet schools. **Measure X**, the “Strong Mayor” initiative also passes; this charter amendment sets a two-term limit and gives the mayor chief executive power to control the city manager, a key position in the city government, and the power to break a tie in the city council. This also contains a sunset clause allowing voters to reconsider it in 2006.¹³
- 1999 **Senator Perata** sponsors AB 1115 requiring the **OUSD** superintendent (**Quan**) to submit an audit by **FCMAT** at the end of the year for \$750,000

¹⁰ FCMAT “Compton Unified School District AB 52 Assessment & Recovery Plans February 1999.” <http://wwwstatic.kern.org/gems/fcmat/ExecSum299.pdf>

¹¹ “A consent decree is a binding legal settlement in which a court-appointed trustee oversees agreed upon actions aimed at righting a wrong”—FCMAT, “Compton Unified School District Serna v Eastin Consent Decree Ninth Six-month Progress Report.” <http://wwwstatic.kern.org/gems/fcmat/CUSD rpt803.pdf>; “State Enters Consent Decree to Settle Lawsuit Over Compton Schools” *City News Service* (Los Angeles) 3/21/2000.

¹² Salazar, *ibid.*; Joyce Nishioka, “Superintendent to quit in Oakland: Quan says she’ll resign in July” *AsianWeek* 4/15/1999; Lori Olszewski, “School district takeovers take off; Oakland effort follows U.S. educational trend” *SF Chronicle* 4/14/99.

¹³ “Jerry Brown; Mayor of Oakland” *San Diego Union-Tribune* 10/29/2000.

from state monies; it would also strip the **school board** of power. Based on the audit, **SPI Eastin** would be authorized to either give the superintendent a year to improve **OUSD** or order that it be taken over by a new administrator appointed by **Mayor Brown**. This law also eliminates social promotion and made summer school mandatory. **Superintendent Quan** resigns after being cleared by the school board in a minor financial scandal.¹⁴

2000 31 jan **FCMAT** private consultants (including **California School Boards Association**, **School Services Inc.**, **Schromm Associates**, **MGT of America**, and **Curriculum Management Systems, Inc.**) conduct a months-long comprehensive assessment of **OUSD**. Audit concludes that OUSD does not meet basic legal and professional standards, district management is ineffective and scored OUSD on average 4.23 out of 10 in the five areas of district operation.¹⁵

2000 Using the FCMAT audit as justification, **Senator Perata & Mayor Brown** raise \$500K for **3Rs**, an educational reform political action committee to support **Brown** in a mayoral school takeover. **Brown** endorses a 4-candidate slate for school board and simultaneously pushes **Measure D** a bill that allows him to appoint 3 Board members (originally conceived as mayorally appointing the entire board but unanimously denounced by the **school board**) and **Measure E** a bill that will implement his recommendations on the **Commission of Education** (who he handpicked).¹⁶ Critics say Brown wants to “create a few strong schools that would attract the new middle-class residents.”¹⁷ Both bills pass in March. The **school board** now consists of 10-members; five of whom are Brown-friendly (three appointed, two elected). **Measure D** will expire in 2004.

2000 feb—**School board** votes to hire then-Alameda schools **Superintendent Dennis Chaconas** as OUSD Superintendent ignoring

Jerry's Kids
Board of Education slate

2-yr term appointees

- 1) **Harold Pendargrass** 2000-04
- 2) **Gilda Gonzales** (Brown's Chief of Staff; ran for District 3 in the elections & lost; Brown appointed her, then fired her in 11/00 pissing off Latino allies & communities)
 - replaced by **Paul Cobb** (2000-04)
- 3) **Wilda White** 2000-02 (opposed Brown's military school, picketed a Brown speech with a sign calling him “environmental racist”; was not re-appointed)
 - replaced by **Viola Gonzales** (2002-04)

cronies

- 4) **Kerry Hammill** District 1 (Perata's Chief of Staff; ran & won)
- 5) **Jason Hodge** District 7

Chip Johnson, “Brown's picks for board squandered; School system needs believers in process” *SF Chronicle* 3/18/02

¹⁴ Robert C. Johnston, “Oakland's Jerry Brown Could Join Mayors With Power Over Schools” *Education Week* 3/3/1999. <http://www.edweek.org/ew/vol-18/25oak.h18>; FCMAT, “Oakland Unified School District Comprehensive Assessment & Recovery Plans” 31 jan 2000. <http://wwwstatic.kern.org/gems/fcmat/over.pdf>; Nishioka, *ibid*.

¹⁵ FCMAT, “Oakland Unified School District Comprehensive Assessment & Recovery Plans” 31 jan 2000.

¹⁶ Tali Woodward, “Jerry Brown's power grab: With a ballot initiative and a slate of school board candidates, Oakland's mayor is looking to take over the school district” *SF Bay Guardian* 2/16/2000.

¹⁷ Tali Woodward, *ibid*.

- Mayor Brown's** handpicked choice, Assistant City Manager and acting superintendent **George Musgrove**. Brown holds a grudge.¹⁸
- 2000 mar—**Measure A** passes to provide **OUSD** with \$303 million in school construction bond funds.
- 2000 9 mar—At **Chaconas'** request **FCMAT** does a follow-up report addressing fiscal & operational issues.
- 2000 june—Alameda County bails out **Emery Unified School District** (Emeryville, CA) with a \$650K loan (due 6/30/2002). Alameda County Office and County Superintendent partially take over the district (the elected **school board** remains in power but County can overrule & rescind their decisions). In oct 2000, **Alameda Superintendent** & **SPI** call in **FCMAT** as fiscal agents and they are given the authority to override the **Board**¹⁹
- 2000 13 sept—**Chaconas** invites **FCMAT** to assess the special education programs, services and administrative support. The report concludes that **OUSD** has too many noncompliance issues and that the special ed program was sapping general operating funds—more than the statewide average.²⁰
- 2000 22 sept—**AB 2265** (**Senator Perata** & **Senator Torlakson**/D-Antioch) passes. This bill appropriates \$1.6 million (\$800K every year thereafter until 2005) from the general state fund, split between **SPI Eastin** and **FCMAT** for modernization/improvement projects in **West Contra Costa County Unified** (monies **WCCU** would have been entitled to had it not been taken over during the 1993-1998 period).²¹
- 2001 Complete state takeover of **Emery Unified** due to financial problems. **SPI Eastin** appoints an administrator and **FCMAT** is designated the fiscal advisor.²²
- 2001 **Bush** Administration's **No Child Left Behind Act** identifies takeover as a strategy to turn around schools with years of low performance.
- 2001 **Broad Foundation** pays for **OUSD school board** field trip to the Museum of Tolerance in Los Angeles to learn to tolerate each other.²³ *For more on Broad, see page 10.*
- 2001 **Compton Unified** becomes the first school district in the nation to pay back its loan. **FCMAT** removes **Randolph Ward** as administrator (partially gives the district back to local control) and he is designated as the Trustee with veto power to monitor the academic and financial performance of

¹⁸ Catherine Gewartz, "Jerry Brown's Next Project: Oakland Schools" *Education Week* 2/23/2003
<http://www.edweek.org/ew/ewstory.cfm?slug=24oakland.h19>

¹⁹ FCMAT, "Emery Unified School District Comprehensive Fiscal Assessment."
<http://wwwstatic.kern.org/fcmat/EmeryUSD.pdf>

²⁰ FCMAT, "Oakland Unified SELPA Review September 13, 2000" not available; see summary on
<http://wwwstatic.kern.org/gems/fcmat/OUSDExecSum0903.pdf>

²¹ Bill AB 2265 http://info.sen.ca.gov/pub/99-00/bill/asm/ab_2251-2300/ab_2265_bill_20000923_chaptered.html

²² FCMAT, "Emery Unified School District Comprehensive Fiscal Assessment."

²³ Alex Katz, "Executives trained by turnaround nonprofit" *Alameda Times-Star* 8/11/2003.

- the school. **CUSD** is not fully returned to local control until the day **Ward** is appointed to **OUSD**.
- 2001 dec—**OUSD school board** voted to lay off district cops (\$2.5 million/year) and replaced them with Oakland PD (\$1 million/year + savings to fund counselors & violence prevention; donated glocks & cars to City). California School Employees Association sues for violation of labor laws. Sept 2003 administrative law judge rules in their favor and orders **OUSD** to pay back wages and losses.²⁴
- 2002 spring—**OUSD** report shows the loss of over 3200 students due to demographic shifts (read: gentrification as families leave the area and childless professionals move in) and charter schools costing the district \$15 million/yr.²⁵
- 2002 sept—**AB 2859 (Aroner)** authorizes **FCMAT** to assess **Berkeley Unified** every 6 months until June 2005 with funds appropriated from the BUSD budget.²⁶
- 2002 Fall—**OUSD** shows improvement on state tests credited to **Chaconas'** reading program, dropout rate was cut in half, more credentialed teachers. Huge budget mistakes are discovered showing that the district overspent \$82 million. (\$27 million debt was discovered when a new accounting system was installed; **OUSD** mismanaged a \$40 million commercial loan; \$15 million deficit due to gentrification & dropping enrollment from blue collar families.)²⁷
- 2002 **Chaconas** releases a recovery plan that retains his position and the **school board** under the supervision of a state-appointed trustee. The plan includes a voluntary pay cut for all non-unionized administrators beginning with himself. **Senator Perata** demands Chaconas be fired and later is forced to publicly apologize by outraged Oakland families & communities.
- 2002 California Legislature reject a bill backed by Fresno **Mayor Alan Autry** to allow mayoral takeover of Fresno school districts and eliminate the election of **Fresno school boards**.
- 2003 3 jan—**Senator Perata & Wilma Chan** (D-Oakland) author **SB 39** to request a \$100 million State emergency loan (to be repaid over 20 years) for **OUSD** in exchange for state takeover. The provision for local control is removed (see 8 april 2003); **Perata** does nothing to keep it in. The **school board** would be stripped of all power; **SPI & state appointed administrator** are invested with all the Board's power and the sole discretion to return the district to local control. The bill gives the power **FCMAT** create an "improvement plan" over the district for an indefinite date to be determined by **SPI** and **FCMAT**. On 22 jan, School board initially rejects

²⁴ Alex Katz, "Judge rules to rehire in-house police force" *Oakland Tribune* 9/26/2003

²⁵ Alex Katz, "Oakland district to face bigger cuts; custodians take the biggest" *The Argus* (Fremont) 9/12/03

²⁶ FCMAT, "Berkeley Unified School District Assessment & Improvement Plan July 2003".

<http://wwwstatic.kern.org/gems/fcmat/berkexecsum.pdf>

²⁷ F.T. Salazar, *ibid.*.

- the loan. On 20 feb, **Perata** pressures the school board to accept the loan by a 2 april 2003 deadline.²⁸
- 2003 Pro-development **Perata** includes “includes an **[SB 39]** amendment to allow the district to sell ... property and use the proceeds to pay down the debt.” **Perata** is particularly keen to sell the “‘really outstanding piece’ of real estate” that “for housing would be really spectacular.”²⁹ District Headquarters building—located in the waterfront area being slated for 10K gentrification—is worth an estimated \$30 million. This amendment makes it into the final bill.³⁰ School Board appointee Paul Cobb calls it a “real estate grab and a contract grab... Don Perata and his development friends want that building.”³¹ Oakland Education Association president Sheila Quintana has been advocating the sale since the beginning of the year. “The district could sell the administration building for \$30 million, Quintana said, and move workers into empty office space within the district.”³²
- 2003 Assembly members **Ray Haynes** (R-Temecula) and **Patricia Bates** (R-Laguna Niguel) introduce **AB 1307 & AB 1464** respectively that authorize mayors to setup and supervise charter schools. This proposal is backed by **Mayor Brown** and **Mayor Autry** (Fresno). Currently stalled in the Education Committee.
- 2003 13 feb—**Superintendent Chaconas**’ office & those of other district officials are burglarized. One of the stolen files contains the confidential copy of a legal opinion the district recently commissioned from SF law firm *Orrick, Harrington & Sutcliffe*—confirms their plan to use \$33.7 million in **Measure A** state bond funds (overseen by SAB) to lessen the district’s \$70 million deficit, avoid takeover and keep local control.³³ Tom Henry—CEO of FCMAT, Mayor Jerry Brown, and Senator Perata, blocks this alternative to takeover. Brown & FCMAT smooth-talk the **State Allocation Board** (SAB) and **Attorney General**’s office to unofficially advise against using the state construction bonds to payoff the deficit.³⁴
- 2003 26 feb—**Chaconas** hires **School Services, Inc.** a private consultant favored by **FCMAT** to audit **OUSD**. SSC recommends laying off 1/5 teaching

²⁸ FCMAT, “Oakland Unified School District Comprehensive Assessment & Recovery Plan Update September 30, 2003.” <http://www.static.kern.org/gems/fcmat/OUSDExecSum0903.pdf>;

²⁹ Alex Katz “State ready to take over schools; Perata urges Oakland district to sell downtown headquarters to help pay off \$100 million loan” *Oakland Tribune* 5/24/2003.

³⁰ Kelly St. John, “Oakland school headquarters’ sale Ok’d” *SF Chronicle* 5/24/2003; SB 39 http://www.leginfo.ca.gov/pub/bill/sen/sb_0001-0050/sb_39_bill_20030602_chaptered.html

³¹ Alex Katz, “Oakland schools enter a new era” *Alameda Times-Star* 6/3/2003.

³² John M. Glionna “THE NATION; Oakland Seeks Record Bailout for Schools; State would take over district, which faces bankruptcy and wants a \$100-million loan” *LA Times* 1/23/2003.

³³ Robert Gammon, “Secret files stolen from Chaconas; Confidential financial, legal papers taken from school chief’s office in nighttime raid” *Oakland Tribune* 2.14.2003.

³⁴ Robert Gammon “Phone logs link ‘politics’ to school takeover” *Oakland Tribune* 8/18/2003; Brenda Payton “Manipulations seen in schools takeover” *Oakland Tribune* 8/20/2003.

- positions, 221 janitorial, clerk & support staff, and cutting the benefits for 1880 workers (take-backs of \$15,000/wkr).³⁵
- 2003 **SPI Jack O'Connell** and **Mayor Brown** consult with **Eli Broad** of the **Broad Foundation** on recommending a state administrator for **OUSD**. **Broad** recommends **Randolph Ward**, a recent beneficiary of the **Broad Center Urban Superintendents Academy**.³⁶
- 2003 **FCMAT** takes over **West Fresno Elementary School District** and appoints an administrator.
- 2003 27 mar—**OUSD School Board** votes to 6 percent pay cut for teachers and request the \$100 million state loan
- 2003 april—**Chaconas & school board** cut 700 teaching & non-teaching positions to avoid state takeover including firing the popular special education program Director Vivian Lura.³⁷
- 2003 8 april—**Oakland Educational Association** holds a press conference the day before the Senate Committee on Education consider **SB 39** that **OEA** has “no confidence” in the district or school board, basically asking for an administrator and stripping the school board of power. This damages **OUSD**'s bid to both receive a loan bailout *and* retain local control. OEA President Sheila Quintana (who Perata backs) states “We are having a state takeover. The question isn't a takeover; it's whether we have a trustee or an administrator. We have no confidence in the board. It hasn't dealt with this crisis.” Conveniently enough, this allows **Perata** to say he supported local control but that OEA undermined the united front.³⁸
- 2003 2 june—**Gov. Gray Davis** signs **SB 39 (Perata)**. **SPI O'Connell** asks for **Chaconas**' resignation; he is given a severance package estimated to be \$350K. The state takes over **OUSD** and the elected school board stripped of its power.³⁹ **SPI Jack O'Connell appoints Randolph Ward for a 3-yr contract as the state administrator**. Ward's salary is \$239K +benefits, moving costs & a state car, all paid by the district. **OUSD** must satisfy the **SPI** and must achieve score averages of 6 out of 10 possible in each of the 5 areas of district operations (and no subset scores below 4) before FCMAT will advise SPI to return **OUSD** to local governance. **OUSD** will repay the loan by 2023
- 2003 july—**AB 2859 (Aroner)** passed, authorizing FCMAT to conduct comprehensive assessment on **Berkeley Unified** every 6 months til 6/2005.

³⁵ Phillip Matier & Andrew Ross, “Oakland urged to dump one-fifth of teachers” *Oakland Tribune* 2/26/2003.

³⁶ Alex Katz “Executives trained by turnaround nonprofit” *Alameda Times-Star* 8/11/2003.

³⁷ Alex Katz, “Chaconas fires head of district's special ed; Program's soaring costs cited, but termination causes uproar” *Oakland Tribune* 4/19/2003.

³⁸ Brenda Payton “Wednesday is a day of reckoning for city's schools” *Oakland Tribune* 4/8/2003;

“Opinion/Editorial: District, teachers union should get real” *Oakland Tribune* 4/18/2003.

³⁹ Katz *ATS* 6/3/2003 *ibid*; Gammon *OT* 8/18/2003 *ibid*.

“An update in OUSD's fiscal crisis” July 2003. <http://www.alameda-coe.k12.ca.us/apps/page.asp?Q=883>

- 2003 sept—**FCMAT** releases its *Oakland USD Assessment and Recovery Plan Update*. They insinuate that **school board**'s move to use school construction bonds to avoid takeover was motivated by special interests and the "undue influence of individual board members" and that there was "no process for gathering input from the community and other stake-holders to insure broad-based participation in the decision making process," unlike state takeover.⁴⁰
- 2003 aug—Jackie Goldberg (D-Los Angeles) the state's Joint Legislative Audit Committee voted last week to order an audit of **FCMAT** (\$192,750, plus travel)⁴¹
- 2003 11 sept—Law passes in state legislature requiring schools to keep bathrooms clean or lose state money. Pending governor's approval.⁴²
- 2003 22 sept—**Mayor's Education Summit** in Washington DC backed by the **Broad Foundation**. The Summit and the Foundation support mayoral takeovers of school districts.
- 2003 26 Sept administrative law judge rules in favor of the school security and orders **OUSD** to pay back wages and losses. Ward plans to appeal but because of labor law violations, it is not likely to win.⁴³

Oakland Unified's FCMAT scores	
as of 9/30/2003	
<u>5 areas of district operations</u>	<u>average scores</u>
Governance/Community Relations	3.92
Facilities Management	1.46
Pupil Achievement	2.47
Financial Management	0.73
Personnel Management	2.64
http://wwwstatic.kern.org/gems/fcmat/OUSExecSum0903.pdf	

⁴⁰ Oakland USD Assessment and Recovery Plan Update. [http://www.fcmat.org/stories/storyReader\\$1120](http://www.fcmat.org/stories/storyReader$1120)

⁴¹ Robert Gammon "City school watchdog faces audit; State targets Fiscal Crisis and Management Assistance Team that runs Oakland district" *Oakland Tribune* 8/28/2003; "It's about time state takes notice of FCMAT" *Argus (Fremont)* 9/9/2003.

⁴² Alex Katz, "Oakland district to face bigger cuts; custodians take the biggest" *The Argus* 9/12/2003.

⁴³ Alex Katz, "Judge rules to rehire in-house police force" *Oakland Tribune* 9/26/2003.

Broad Foundation

est. 1999

This is the \$400 million philanthropic vehicle for Los Angeles housing development and investments billionaire, **Eli Broad (& wife Edythe)**, to take on K-12 education issues and develop a future standardized workforce of "knowledge workers." The Foundation supports reforming urban public schools through entrepreneurial CEO-trained leadership, mayoral takeovers. Like many reactionary think tanks (Pioneer Institute, American Diploma Project, et al.), **Broad Fdtn** sees the main value of education in its output of skilled workers, hence the focus on standardized testing. The Fdtn's three flagship initiatives are The Broad Prize for Urban Education, **The Broad Center for Superintendents** (nonprofit executive development center established by the Fdtn and former Michigan Governor, John Engler), and **The Broad Institute for School boards**.(1) **Noelia Rodriguez**, previously Laura Bush's press secretary, has become Chief of Staff to Broad and will serve as Director of External Affairs for the Broad Foundation.(2)

Broad is the son of Lithuanian immigrants. co-founder of two S&P 500 corporations—the enormously successful KB Homes and AIG SunAmerica Inc. **Broad** has bankrolled the Eli Broad College of Business & Eli Broad Graduate School of Management at Michigan State University, the Walt Disney Concert Hall for the LA Philharmonic (recruited by Mayor Dick Riordan and completed 10/03), Broad Art Foundation (international art "lending library") and Broad Contemporary Art Museum at LACMA (*in works*). (3) **Broad** was appointed to Schwarzenegger's gubernatorial transition team.(4) **Broad** is currently fundraising for Democratic Presidential candidate Wes Clark (previously Broad chose Clark to run LA Unified).

BROAD & the OAKLAND UNIFIED SCHOOL DISTRICT

2001

- **Broad Institute for School boards** pays for **OUSD school board** field trip to the Museum of Tolerance to learn tolerance for each other.(6)

2003

- **Dr. Randolph Ward** was selected for **Urban Superintendents Academy** by the **Broad Center for Superintendents**.
- **Eli Broad** advises **SPI Jack O'Connell** and **Mayor Jerry Brown** on appointing an administrator for **OUSD**.(5)
- **SPI Jack O'Connell** appoints **Ward** as the OUSD administrator
- **Ward** appoints **Arnold "Woody" Carter** as his Chief of Staff. Carter is one of Ward's **Broad Academy** cohort.(6)
- **Monique Epps** is hired for OUSD finance office; **Broad Foundation** covers 75% of her salary.(5)

Eli Broad on OUSD takeover:

"We'll be observing from a distance, but we won't be running the district in any way shape or form." (5)

(1) www.broadfoundation.org; (2) "Career Track: the First Noelia" *The Hotline*. 10/7/03; (3) Eli Broad <http://www.bus.msu.edu/information/about/elibroad.html>; (4) "California transition: Schwarzenegger's team" *SF Chronicle* 10/10/03; (5) Alex Katz "executives trained by turnaround nonprofit" *Alameda Times-Star* 8/11/2003; (6) "School district names chief of staff" *Contra Costa Times* 8/8/2003 & Broad Center for Superintendents Alumni profiles <http://www.broadcenter.org/alumni/index.shtml>

Dr. Randolph E. Ward⁴⁴



PERSONAL

born 11/1956 hometown Roxbury, MA

biracial parentage: father—hospital custodian & newspaper delivery & former military; mother—??

siblings—LA SWAT team, Oncologist, Boston Police, 2 Boston public school teachers (one works with deaf children the other with preschool Special Ed) and youngest is in college.

1998 married Cheryl Marie James-Ward (fka White)

Jointly buy a home in Long Beach for \$399K

4/2003 daughter Jeme is born in Long Beach

Ward's track record as a school administrator (principal) & state-appointed administrator (takeover) is no tolerance, personal responsibility/accountability for administrators, teachers & students. As a state administrator he is particularly focused on a neo-liberal model of education reform; education is seen as a business and needs to run in that way by an authoritative CEO. His focus has been on the bottom line and results oriented: finances, modernization projects (facilities improvements) as a result of the Serna v Eastin Consent Decree, standardized testing and privatization of school services (janitorial & buses). His approach is, "I didn't come here to be popular or make friends. My job is to work myself out of a job, and I'm committed to doing that."⁴⁵ He and the California Department of Education see themselves as being untouchable, ethical, non-partisan, and particularly at the local level outside & above politics, corruption, bickering, favoritism and nepotism that characterize local politics. He especially has little faith in the local community and the elected school board to make administrative decisions. His stance is they are the folks that got the district in trouble and they cannot be the ones to turn it around. With regards to teachers and school staff, he dismisses their complaints by saying when adults bicker to their own benefit, but it's the children who pay the price. This "outsider" stance and value of business experience is also how he works in terms of hiring for top administrative positions. He is registered voter with the libertarian American Independent Party.⁴⁶ The Broad Foundation undoubtedly influences him.

⁴⁴ Meredith May, "PROFILE: Randy Ward; New schools chief bets on Oakland' Oversight of trouble school system begins today." *SF Chronicle* 6/16/2003. Statement of Randolph Ward on being named administrator for OUSD <http://www.alameda-coe.k12.ca.us/apps/page.asp?Q=1005>; Randolph E. Ward. Ed.D. State Administrator Biography <http://bex.ousd.k12.ca.us/RandyWard.asp>; "Alumni Class Notes." *FYI News from the USC Rossier School of Education* June/July 2003.

⁴⁵ Deborah Belgum "Local elections; snubbing the schools; Compton officials who are angry with state takeover of district hail defeat of bond issue after urging voters to reject it" *LA Times* 4/16/1998

⁴⁶ California American Independent Party. <http://www.aipca.org/>

His biggest critics/opponents in Compton were Mayor Omar Bradley, elected several Board members and union teachers who were resentful of state occupation and Ward' lack of community accountability. They claim many of the improvements during his administration were superficial and he failed in attracting and retaining more non-emergency certified teachers.

Randy Ward continued

Education History

- High school, all-male Jesuit private school.
- 1974 B.S., Early Childhood Education—Tufts University
taught public school in Boston & Cambridge, MA for 10 years
Ed.M., Education School Leadership—Harvard University
M.Ed., Education Administration—University of Massachusetts
taught English in Venezuela & Colombia for 2 years
- 1989-96 Principal, Whittier Elementary School—Long Beach, CA
- 1994--1st principal in the nation to require school uniforms
 - fundraised for low-income families
 - corporate sponsorship for logo embroidery
 - zero tolerance policy
 - test scores doubled
 - attendance rose from 16th in the district to 1st.
- 1992 Ed.D., Policy, Planning & Administration—USC
- 1992-now sits on the Rossier School of Education (USC) Board of Councilors (Alumni Advisory Board)
- 1996 State-appointed Administrator of **Compton Unified School District**
- SPI Eastin & Ward's position is that the school board & CUSD administration were the ones to get CUSD in the "mess" to begin with and they are incompetent & nepotistic.
 - Ward is assigned Tyrus Lee, a bodyguard (from CHP California Dignitaries Protection Squad) because state administrators face death threats in Compton. The first administrator appointed Stan Oswald was shot at.⁴⁷
 - Both City of Compton & communities oppose the state occupation and the administrator's lack of community accountability.
 - sued by the ACLU for neglecting the basic rights of minority children
 - 1997 **Serna v Eastin consent decree** sets out basic rights that must be fulfilled including facilities repairs (roof, bathrooms, broken windows, graffiti, electrical wiring), textbooks, teacher certification, employee absenteeism

⁴⁷ Tim Cornwell, "L.A.'s most wanted; Turning schools around; profile; Randolph Ward; Features & Arts" *The Times Educational Supplement* 3/17/2000

- policy, homework policy, increase in security, and clean drinking water
- o 1998 Ward backs **Measure A**—a school construction bond to pay for modernization & promises a citizen advisory committee to oversee spending, but the bill fails given the City of Compton and community resistance.⁴⁸
- o 1997 teachers are given 4% raise to \$28,140. In LA, starting salary is \$31,300⁴⁹
- o 1998 City of Compton sues Calif. Dept of Education to regain control of CUSD. The lawsuit seeks a memorandum of understanding with CDE to return Compton to local control within 18 months.⁵⁰
- o 1998 after Ward broke a school board tie he appoints Leslie Irving to fill an open seat (due to resignation). The Supreme Court temporarily bars Ward from appointing someone to an elected seat.⁵¹
- o 1999 Ward endorses a citizens oversight committee to set priorities over repair and restoration of school campuses after the advisory School Board votes 2-1 in favor of it. The goal is to have an “impartial and independent panel that will review the requests for projects that will be paid for by public funds.” Mayors of Compton, Carson & Paramount, the Compton Community College board & ACLU, will appoint representatives. This committee does not have decision-making power.⁵²
- o march 1999 Ward creates a school report card system that grade & display at school campuses on 12 nonacademic categories, similar to the restaurant grade system in order to hold principals accountable for facilities.⁵³
- o sept 2000 outsources bus service, laying off union bus drivers (most of whom are parents & community members)⁵⁴
- o facilities modernization project mostly as a result of Serna v Eastin
- o privately run tutoring centers
- o Teach 4 America

⁴⁸ Deborah Belgum, “Local elections; snubbing the schools; Compton officials who are angry with state takeover of district hail defeat of bond issue after urging voters to reject it” *LA Times* 4/16/1998

⁴⁹ Belgum *ibid.*

⁵⁰ “Compton sues state to regain control over school district” *AP* 10/28/1998

⁵¹ “News in brief: a summary of developments across Los Angeles County; Community news file/Compton; Judge bars school administrator from filling board vacancies.” *LA Times* 1/17/1998

⁵² “Southern California/a news summary; the local review/developments in Los Angeles County; State officials approves Compton Schools panel” *LA Times* 1/16/1999

⁵³ Julie Ha, “Compton to rate campuses by letter grades” *LA Times* 3/20/1999

⁵⁴ Joe Mathews, “Compton schools to get control in steps; education: some board members denounce phased-in plan, want state to relinquish role at once.” *LA Times* 9/20/2000

- 3-yr teacher contracts
 - outreached to Latino community
 - school site parent councils
 - end social promotion
 - mandatory summer school for flunking
 - focus on 4Rs (Reading 'Riting, 'Rithmetic + Responsibility)
 - parents pay for missing textbooks or student lose privileges
 - called in FBI & ATF on to campuses after a series of 10 arson fires in 1999
 - replaced all high school principals & top administrative staff⁵⁵
 - hiring of "Kid Principals" or "Randy's Army";
 - 1/3 of the elementary, middle & high schools are run by folks under 40⁵⁶
 - according to Ward "competent, energetic, motivated, still-idealistic that don't believe this district and these children can't learn"
 - many are in the Teach for America program
- 2001 State-appointed Trustee of Compton Unified
- overruled the elected school board in teacher contract negotiations⁵⁷
 - allows 2% salary raise but not the 2% cost-of-living adjustment
- 2003 **Urban Superintendents Academy**--Broad Center for Superintendents leader
- appoint Woody Carter, cohort 2003, as Chief of Staff a vacant position
- 2003 applied & rejected for Superintendent position at **Dallas Unified** reasons unknown
- 9/29/2003 *Dallas Morning News* reveals Ward's party affiliation with American Independent Party. AIP is anti-federalist populist & "constitutionalist" libertarian party, strongly supporting state-level government. AIP is known for backing the 1968 presidential bid of segregationist George Wallace and advocates eliminating affirmative action and bilingual programs, denying public education to children of undocumented workers, eliminating, repealing the US Voting Rights Act (which prohibits tampering with the votes of minorities), ending federal income taxes and closing the US Department of Education.⁵⁸

⁵⁵ Tim Cornwell, *The Times Educational Supplement* 3/17/2000

⁵⁶ Marketplace "Young Leaders get California school back on track" Minnesota Public Radio 5/21/2001

⁵⁷ Joe Mathews "Los Angeles; Compton Teachers Union criticizes State Trustee" *LA Times* 5/14/2002

⁵⁸ Paul Pringle, "Ward's party affiliation surprises Dallas trustee; group targets undocumented immigrants, bilingual ed" *Dallas Morning News* 9/29/2003

2003

SPI Jack O'Connell appoints Ward the state-appointed administrator for **OUSD**. Salary \$239K + benefits + state car.

- june—stripped the school board of its power, secretaries & offices and makes it an advisory figurehead meeting on a monthly basis.
 - **AB 39** “includes an amendment to allow the district to sell the property and use the proceeds to pay down the debt.” The building—located in the waterfront area being slated for gentrification—is worth an estimated \$30 million.⁵⁹ Ward states it's too soon to tell if OUSD needs to sell the district headquarters.
 - summer, **OUSD** inks a \$1 million deal with Global Modular (a wholly-owned subsidiary of Global Diversified Industries) to buy prefabricated modular buildings including an *administration building*, portable restroom structure, classrooms and a science lab. They are currently in the process of delivery.
 - \$65 million of the state loan goes toward the \$57 million deficit and to build reserves
 - big on accountability: requires teachers to post their teaching plans & ongoing student achievement in the classroom & school offices⁶⁰
 - Staff cuts to save \$4.7 million
 - created 19 new positions to assist him in streamlining operations
 - fills a vacant position—Chief of Staff (\$123K/yr) by hiring Woody Carter, a Broad Urban Academy for Superintendents cohort⁶¹
 - hires Monica Epps as a budget person; Epps was previously Business Manager for the NBA; 75% of Epps salary is subsidized by the Broad Foundation.
 - Although it's reported that Ward isn't coming into Oakland with a “prepackaged team of experts” or his prior associates⁶², brings Tim White in as Assistant Superintendent. White has been Ward's right-hand man for the last 15 years in Long Beach & Compton. White will be handling facilities issues.⁶³
 - Special Education—Ward is not reversing the firing of Vivian Lura. “I don't think we need five-star programs for everybody. We can serve children with good, quality programs”⁶⁴
- sept—laid-off 100 district workers (60 custodians, several HQ office workers, and other staff).⁶⁵ This brings the total layoffs since June to 780 or 14% district workforce.⁶⁶

⁵⁹ Kelly St. John, “Oakland school headquarters' sale Ok'd” *SF Chronicle* 5/24/2003

⁶⁰ Matthew Liesling, “Ward readies to shape up schools” *Contra Costa Times* 6/27/2003

⁶¹ Mike Adamick, “New school cuts stirring controversy.” *Contra Costa Times* 9/12/2003. see employment listings <http://employment.ousd.k12.ca.us/>

⁶² Meredith May, “Profile: Randy Ward; New schools chief bets on Oakland; Oversight of troubled district begins today” *SF Chronicle* 6/16/2003

⁶³ Alex Katz, “Schools' boss vows tight ship; state administrator Ward starts today, has already cracked down on student absenteeism” *Oakland Tribune* 6/16/2003

⁶⁴ Matthew Leising “Ward readies to shape up schools” *Contra Costa Times* 6/27/2003

- hires former corporate execs for District Administrative positions
- sept—Ward instituted a progressive punitive attendance policy. More than 3 unexcused absences will generate a meeting for signing an attendance contract with parents & students. Continued absences then parents must attend a district-wide meeting. Finally, parents may be taken to court and fined \$250-\$1000.⁶⁷
 - If attendance does not increase, Ward is forming a committee to look at closing down “underutilized” schools. AB 39 authorizes the sale of those properties⁶⁸
 - ➔ *This could result in the sale of public lands to developers.*
 - sept—Ward cuts off 500 district cell phones (\$750K/yr)⁶⁹
 - sept Oakland Black Caucus throws a reception for him
 - oct—Ward rescinded OUSD Board’s construction fundraising deal with Hillcrest Elementary (the Hills) parents & cancelled construction plans citing that district money was needed elsewhere. \$400K raised by parents is being held in a non-profit building fund.⁷⁰
 - Oct 10 Ward speaks at a District 2 Education Summit at Roosevelt Middle organized by School Board member David Kakishiba.⁷¹
 - Oct 23 The Oakland Metropolitan Chamber of Commerce hosts a breakfast with Randolph Ward, Ph.D., state administrator of the **Oakland Unified** School District @ Oakland Marriott City Center

⁶⁵ Alex Katz, “Many longtime school district workers get ax; Gary King who spent more than 2 decades.” *Oakland Tribune* 10/6/03.

⁶⁶ Alex Katz, “Oakland district to face bigger cuts; custodians take the biggest.” *The Argus* (Fremont) 9/12/03

⁶⁷ Mike Adamick, “The high cost of truancy.” *Contra Costa Times* 9/30/03.

⁶⁸ Alex Katz, “Oakland district to face bigger cuts; custodians take the biggest.” *The Argus* (Fremont) 9/12/03

⁶⁹ Chip Johnson, “Chief upsets some people by doing job; Difficult choices at Oakland schools” *SF Chronicle* 9/29/2003

⁷⁰ Mike Adamick, “Hillcrest parents, district fight over funding.” *Contra Costa Times* 10/10/03

⁷¹ Kakishiba has not returned our call yet.

Dr. Cheryl Marie James-Ward⁷² (fka Cheryl White)

PERSONAL

b. April 1963

hometown: Los Angeles area

married to Elliott White, divorce in 1994

She changes her last name to James.

1995 Bought home in Carson from her ex for \$7K. Sells it in 2000 for \$225K.

1998 marries Randolph Ward

Jointly buy a home in Long Beach for \$399K

4/2003 daughter Jeme is born in Long Beach

EDUCATION

1989 Teacher, Richard Henry Dana Junior High (San Pedro—Los Angeles)

199- appointed Dean of Students

199- coordinated math & science program--Upward Bound @CSU Long Beach

199- Principal, in the Pasadena Unified School District

1995?–2002 Principal of Jane Addams Elementary School in Long Beach

"The number of jail cells that we need in the future is determined by the number of kids who aren't reading at the end of the third grade."⁷³

- "NO EXCUSES" policy
- Addams had a 100% increase in test scores. Twice as many students reading at grade level, mastering math facts, scoring at the proficient level in open-ended math and writing response.
- Home reading program and morning Sustained Silent Reading or Power Reading.
- In 1995, school leadership incorporated the Peace Builders Program which promotes the following principles – praising people; seeking wise people to help mediate difficult situations; righting wrongs by responding in ways that will lead to peaceful endings; noticing hurts; and giving up putdowns.
- 2001 School was featured in a "beat-the-odds" video & report at the "Leadership for Literacy" national forum sponsored by the Educational Testing Service (ETS) and the Education Commission of the States (ECS).⁷⁴

⁷² For a picture, see http://www.csudh.edu/univadv/Dominguez_Digest/DD%20Summer%202000c.pdf

⁷³ <http://www.ets.org/aboutets/nf01sum.html>

⁷⁴ <http://www.ecs.org/clearinghouse/29/77/2977.htm>

2000 CDE *Literature for Science and Mathematics: Kindergarten Through
Grade Twelve Advisory Committee*⁷⁵
eff. 8/2002 Director of Academic Initiatives, LBSD. *Teacher's Association of
Long Beach*⁷⁶

⁷⁵ <http://www.cde.ca.gov/ci/scimathlit/acknowledgments.html>

⁷⁶ http://www.talb.org/talb_files/tag08-02.pdf

Other Readings

Oakland USD Assessment and Recovery Plan Update

[http://www.FCMAT.org/stories/storyReader\\$1120](http://www.FCMAT.org/stories/storyReader$1120)

These documents lay out the FCMAT's assessment of the 5 areas of district operations and their advice for recovery.

Compton Unified bio http://www.compton.k12.ca.us/board/bio_ward.htm

Basic bio for Randolph Ward

LA Weekly article Compton's Quagmire

<http://www.laweekly.com/ink/printme.php?eid=1031>

Overview of the state takeover in Compton.

Improving Achievements in Low-Performing Schools

by Randolph Ward & Mary Ann Burke

<http://www.sagepub.com/book.aspx?pid=9917>

YSP ordered this; expected to arrive this week.

"As accountability in schools becomes more crucial, educators are looking for comprehensive and innovative management practices that respond to challenges and realities of student academic achievement. In order to improve academic performance and the quality." Six main subjects:

- Improving student achievement in the core subjects
- Aligning teaching and learning with student performance
- Linking professional development for all staff to the goals for students
- Creating safe, clean, and secure school facilities
- Forging stronger links with parents, families, and the community
- Increasing management effectiveness, efficiency, and accountability

Todd Ziebarth, "Policy brief: Accountability; State takeovers and reconstitutions" (updated april 2002 (july 1998))

<http://www.ecs.org/clearinghouse/13/59/1359.htm>

Good concise overview of state takeovers, opposing perspectives, effects & policy questions. Also addresses reconstitutions which are districts cleaning house without state involvement (San Francisco Unified & Portland Public Schools are two examples).

Kenneth Wong & Francis Shen are two education policy professors at Vanderbilt and Harvard. <http://www.people.fas.harvard.edu/~fxshen/papers.html>

This website has many of their papers on education policy, state & city takeovers.

- Francis Shen, "Political incentives and mayoral takeover of urban school districts," School Board Politics Conference Program on Education Policy & Governance, Harvard university, October 15-17, 2003
http://www.people.fas.harvard.edu/~fxshen/FrancisShenTakeoverPoliticalIncentives_AERA2003.pdf
- Kenneth Wong & Francis Shen, "Can school district takeover work? Assessing the effectiveness of city & state takeover as a school reform strategy" <http://eric-web.tc.columbia.edu/digest/dig174.asp>
3 page overview of takeovers, promises & limitations, & research on its effectiveness.
- Kenneth Wong, Francis Shen, Pushpam Jain, & Gabrielle Novacek, "City & state takeover as a school reform strategy" *Association for Public Policy Analysis & Management* University of Chicago 2000.
<http://www.people.fas.harvard.edu/~fxshen/WongShenAPPAM2000.pdf>
- Kenneth Wong & Francis Shen, "When mayors lead urban schools: toward developing a framework to assess the effects of mayoral takeover of urban districts." *School Board Politics Conference—Program on Education Policy & Governance*, Harvard University Oct 15-17, 2003.
http://www.people.fas.harvard.edu/~fxshen/Wong&Shen_PEPG_SchoolBoardsConference.pdf