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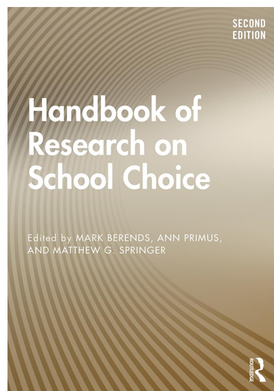

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Charter School Governance and Politics

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CHARTER SCHOOL GOVERNANCE AND POLITICS

Katrina E. Bulkley and Jeffrey R. Henig

Measured against many other institutional elements of the American education system, charter schools are relatively new. Local school boards, perhaps the most well-known governance division, go back almost two hundred years to the 1820s, when Massachusetts passed laws making existing "school committees" independent (Maeroff, 2010). By way of contrast, the first charter school in the United States opened in Minneapolis in 1992. In 1999–2000, charter school students nationwide still comprised less than 1 percent of public school enrollment, and in 2004–2005, still less than 2 percent—"a speck on the landscape nationally" (Vanourek, 2005, p. 24).

Today, all but six states have charter school laws. There are over 3 million students in about 7,000 charters. While charter expansion has slowed recently, it still continues (Prothero, 2018). Expansion in some locations is particularly notable. In the 2016–2017 school year, there were 208 districts in which at least 10 percent of students attended charter schools, seven at or above 40 percent, and three (New Orleans, Detroit, and Flint) above 50 percent (National Alliance for Public Charter Schools, 2018). Although early charter schools were mostly small standalone schools, large networked charter management organizations (CMOs) have proliferated in recent years. In 2010, 16 percent of newly opened charter schools were associated with CMOs, rising to 39 percent in 2014 (Mead, Mitchel, & Rotherham, 2015).

While the charter sector has continued to grow and evolve, researchers have typically been at least a step or two behind those changes. In the previous edition of the *Handbook of Research on School Choice*, the chapter on the politics and governance of charter schools focused heavily on the diffusion of the charter school idea (Wong & Klopott, 2009). Because it takes time for new policies to be implemented, because they typically change as they are institutionalized, and because student impacts may take years to manifest, it was too early for that chapter to consider some of the important questions that were beginning to emerge around charter school governance and politics.

In this chapter we focus our attention on evidence of change in the sector, new areas getting research attention, and what we will argue represents the maturation of theory and conceptualization by which the research is framed. Following a description of what we mean by governance and politics, we offer brief case studies that illustrate the varied nature of charter school governance and politics and hint at how charters are becoming integrated within more general local and state governance and politics. Two overarching and linked themes are revealed in our review. First, in a number of areas, the governance and politics of charter schools—and of traditional school districts—have evolved in ways that make the two sectors less distinct than envisioned when charters first

arrived on the scene. Second and as a result, research is progressing from studies of charter governance and politics per se to studies of charters in the context of broader changes in those arenas.

Setting the Terms: What are Governance and Politics?

Analysis of charter schools has tended to focus on the links to market metaphors underlying the charter idea rather than diving more deeply into issues of governance and politics. Although proponents of the first charter school law in Minnesota primarily thought about charters as a form of decentralization within the public sector, the movement was quickly joined by interests motivated by the economic framing of charters as a way to bring competition and choice to bear on improving schools (Henig, 2008). Some of these interests had championed more clearly market-driven school vouchers, but political obstacles to voucher policies left them eager to embrace charter schools as a less contentious vehicle for promoting their agenda (DeBray-Pelot, Lubienski, & Scott, 2007; Kirst, 2007). At the same time, supporters of traditional public schools made the tactical decision that their best hope of blocking the charter movement was to appeal to Americans' core commitment to democratically controlled public schools and portray charters as a Trojan horse hiding a more radical privatization plan. As a result, both proponents and opponents came to define charters as the anti-politics, anti-public sector option. This, in turn, shifted attention away from how the process of initiating and overseeing charters is itself a governance reform steered as much by politics as by consumer/supplier interaction.

Some definitions might help. Politics refers to the interactions among citizens, interest groups, politicians, and other public sector officials undertaken to articulate, negotiate, contest, and change government priorities, laws, regulations, and practices. Political behavior by these various stakeholders may be motivated by narrow self- or organizational interests, by principles and aspirations about the collective good, or by some combination of these. Although the market metaphor sometimes leads analysts to write as if the politics all happens on the anti-charter side of the battle—with teacher unions, local school boards, and their loyalists using their control of political levers to block charter laws and limit charter authorizations—there are political actors operating on the pro-charter front as well.

Governance refers to the formal structures and institutionalized rules and norms within which the contestations and negotiations over education policy take place (McGuinn & Manna, 2013). Governance institutions can be designed in ways that centralize or decentralize decision-making. They can, for example, grant more or less formal power to the state as opposed to local authorizing bodies, or place more or fewer constraints on the ways individual charters shape and utilize their governing boards. The particular features of governance institutions also can affect the relative influence of popular expression versus professional expertise or the emphasis on nationwide consistency versus adaptation to local context. Charter laws and regulations, for example, can stipulate what information charters must make available to the public, subject them to more or less frequent and challenging reauthorizations reviews, and favor or disfavor proposals from CMOs versus local, standalone operators.

Three Cases

The governance structures and political alignments tied to charter schools are complex, inter-related, and heavily shaped by local context. To demonstrate some of this complexity, we describe here how charter governance and politics have played out differently in three places that have attracted research attention because of special features, but which also provide useful windows into processes common in many places.

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New York City: State and Local Politics in the Context of Mayoral Control

New York City provides an interesting case of managed incorporation of charters and the politics of charters at both city and state levels, as well as the intersection between charter school politics and the special governance issue of mayoral control of schools. Although the city is second only to the Los Angeles Unified School District in the total number of charter students (slightly under 103,000 in 2016–2017), just 10 percent of all of its students are enrolled in charters, ranking it 196th among districts in overall market share (National Alliance for Public Charter Schools, 2018). The New York City mayor essentially runs the school system, appointing the district chancellor (superintendent) and most members of the Panel for Educational Policy, the city's equivalent of a school board. Granting mayoral control has been a popular governance reform since the early 1990s, favored by education reform advocates who believe that elected school boards are overly beholden to teacher unions and resistant to new approaches like charter schools (Henig & Rich, 2004; Viteritti, 2009; Reckhow, 2012).

Beginning in 2002, under Mayor Michael Bloomberg, the city aggressively courted charters, provided many with space in district public school buildings, and incorporated them into one of the nation's early examples of a portfolio management model (Gyurko & Henig, 2010; DiMartino & Scott, 2013). Throughout Bloomberg's term in office, charter schools and their advocates were part of the city's approach to governance. They provided organizational capacity that helped the city advance an overall agenda for expanding school autonomy and parental choice, and also political support, including a grassroots voice in favor of Bloomberg's successful effort to be permitted to run for a third term in office (Gold, Simon, Good, Henig, & Silander, 2011).

Although cities with mayoral control have been seen as generally supportive of charters, that expectation was challenged by the 2013 election of Bill de Blasio, whose opponents received financial and public support from charter advocates. A major theme in de Blasio's campaign was his promise to curtail charter expansion and to charge charters rent for access to school buildings. In September 2013, Eva Moskowitz, the politically savvy leader of the Success Academies network of charters, urged the parents of the roughly 4,600 students in her schools to join in a march on City Hall (Cramer, 2013). After losing that battle, they adeptly switched their focus to the state level with a March 2014 protest in Albany, the New York state capital. Governor Andrew Cuomo made a surprise appearance to show his support. With his subsequent encouragement, the state legislature blocked de Blasio's plan to get tougher on charters, requiring that the city provide charter schools free space in public school buildings or pay much of the cost to house them in private facilities. In the background of Cuomo's support was at least $800,000 in campaign contributions from "bankers, real estate executives, business executives, philanthropists and advocacy groups" with histories of pushing for charter schools (Decker, 2014, para. 4).

Washington and Massachusetts: State Charter Initiatives

In November 2012, Washington State passed a charter school law via public referendum, Initiative-1240 (I-1240), that has since faced legal challenges (Au & Ferrare, 2014; Saultz, 2017). The politics leading up to I-1240 demonstrate how local and national funders, advocacy organizations, and researchers worked collaboratively in support of this specific referendum, how opposition by Democrats and educator groups blocked adoption of a charter law for many years, as well as the influence of federal policy on state politics.

The passage of I-1240 followed over 15 years of attempts to enact a charter law through both the legislative and referendum processes. These defeats largely rested in the hands of influential state actors, including the Washington Education Association and Democratic members of the legislature (Saultz, 2017). However, these actors were ultimately unsuccessful, as well-funded and persistent

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charter advocates emphasized that failure to institute charters would cost the state its chance to win federal money under Race to the Top (Au & Ferrare, 2014; Saultz, 2017).

Charter advocacy benefited from financial support from funders with direct links to Washington State, including Bill Gates and Paul Allen (both formerly of Microsoft, headquartered in Seattle) and national funders with strong ties to charter schools, including Alice Walton, Eli Broad, and Doris Fisher (Corcoran & Stoddard, 2011; Au & Ferrare, 2014). These and other funders both supported the effort directly and backed multiple nonprofit advocacy organizations like the Washington-based League of Education Voters and the business-affiliated Partnership for Learning, as well as local members of national nonprofits like Stand for Children, Democrats for Education Reform (DFER), and the Washington Coalition for Public Charter Schools. Funding from I-1240 supporters also went to the Center for Reinventing Public Education (CRPE) at the University of Washington, which provided research to support the effort (Au & Ferrare, 2014).

The success in Washington stands in sharp contrast to the failure of a 2016 ballot initiative to raise the cap on the number of charter schools in Massachusetts. A "post-mortem" memo provided to the Walton Foundation showed a dramatic loss of support between the time the initiative was introduced and the actual vote, and linked this change to a particularly partisan election, strong opposition from teacher unions, and effective framing by opponents who critiqued the funding shift from district to charter schools and focused on improving "all" public schools (Barnum, 2018, p. 4).

New Orleans: Shifting from the Politics of Adoption to Implementation

The story of New Orleans highlights the role of national actors in local politics and the shifts in an overall political regime that can accompany expansive charter school growth. It also underscores the interplay between state and local policy and politics in governance change, and the tensions that arise when largely White outside actors seek to remake a public education system that predominantly serves a historically marginalized community.

Hurricane Katrina hit the city in 2005, causing massive destruction that became a turning point in an already struggling public school system (Buras, 2014; Welsh & Hall, 2018). Within just a couple of years, national foundations, including the Bill & Melinda Gates Foundation, committed to major investments in public education in New Orleans, with these investments flowing to national and local organizations supportive of charter schools (Burns & Thomas, 2015). Some have argued that the new, mostly White actors were looking both to impose on the city their own ideas of education for low-income children of color and to profit financially (Buras, 2014; Dixson, Buras, & Jeffers, 2015). Critical to these changes was the fact that the state-run Recovery School District (RSD), which enabled charter school expansion in alignment with No Child Left Behind (NCLB), was already in place (Welsh & Hall, 2018). Between 2005 and 2018, New Orleans shifted from 123 traditional public schools and six charter schools to four traditional public schools and 78 charters.

While a relatively small number of influential national and local actors pushed the initial changes, advocates have since reconfigured the overall governing regime in ways intended to sustain the reform structures. Included in this has been a concerted effort to remake the Orleans Parish School Board (OPSB), which the RSD sidelined for many years but which regained authority over almost all publicly funded schools in 2018 (Welsh & Hall, 2018). In this new regime, informal power sits in the hands of a small number of well-financed CMOs and is supported by substantial outside funding for pro-charter school board candidates (Jabbar, 2015; Welsh & Hall, 2018).

Importantly, issues of race have shaped the politics of New Orleans charters. Immediately following Hurricane Katrina, OPSB teachers—a substantial portion of whom were Black and formed a core component of the Black middle class—were fired (Buras, 2014; Dixson et al., 2015). Many were not rehired; instead, numerous (often White) young educators came from outside the city and

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state via pro-charter organizations such as Teach for America and the New Teacher Project. Dixson and her colleagues (2015) argued, "The entire power structure of public education in New Orleans has been recast to represent the views, beliefs, and desires of a White minority" (p. 289). In this context, DeBray and her colleagues identified a second coalition with strong grassroots links that has pushed back in important ways on the dominant actors (DeBray, Scott, Lubienski, & Jabbar, 2014).

Looking across these three very different cases, it is worth noting some important patterns in charter school politics and governance. First, states—and the design of state laws—have played a critical role in charter school engagement within state and local contexts. For example, the availability of multiple authorizers in New York State and Louisiana paved the way for greater pressure on charter expansion. Second, the politics surrounding charter schools have involved advocates and critics engaging in "venue shopping" through seeking to promote their positions at different levels of the system. In Washington State, this included seeking to work through both the state legislative process and the ballot initiative option, while in New York City, activists went to the state legislature when they were unable to accomplish their goals locally.

Third, a set of nationally active advocacy organizations and funders have partnered with local actors to support charter efforts, while educator unions have been (with more or less success) a central driver behind efforts to limit charter schools (Reckhow, 2012). While national supporters ultimately met with success in Washington State and New Orleans, the election of de Blasio in New York City was a defeat for charter advocates. And unions have had greater pull in places such as Massachusetts. Finally, we see consequential political engagement by groups within the charter sector, such as CMOs in New York and New Orleans.

The Evolution of Governance and Politics of Charters

In the early years, both policymakers and researchers largely treated charter schools as a distinct and separate form of publicly funded education. However, our review finds that the emergence of new school-based and systemic organizational forms, the engagement and influence of advocacy organizations, and the changing role of public and private outside funding demonstrate how charters are increasingly integrated into broader discussions of public education.

Charter Schools and New Organizational Forms

Charter school governance and politics are shaped not only by formal legal distinctions—especially those in state laws—but also by the emergence of new organizational forms that were enabled but not determined by those laws. From a governance standpoint, charter school authorizers are the most notable form. In addition, there are new forms for schools and groupings of schools, including nonprofit CMOs, for-profit educational management organizations (EMOs), and virtual charter schools, as well as broader, system-level reforms that often incorporate charters, such as portfolio management models (PMMs) and mayoral takeover.

Varieties of Authorizers

During the first decade of the charter movement, much attention focused on the extent to which state laws were or were not conducive to the rapid spread of charter schools. The Center for Education Reform (CER), a pro-charter organization in Washington D.C., promoted a package of structural elements that it encouraged states to adopt, scored them on the degree to which their laws incentivized charters, and publicized those scores to leverage more charter-friendly legal and regulatory environments (Allen, Consoletti, & Kerwin, 2012). At that point, reflecting the original conception of charters and the first wave of charter proposals, the dominant image was of small

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groups of education innovators proposing standalone charters that might appeal to niche markets (Nathan, 1996).

During these years, discussion about and research on authorizers focused heavily on the question of whether local districts as authorizers would set the bar so high as to choke off any substantial inroads. Based on its assumption that local districts would protect the status quo and see charters as undesirable competition, CER favored laws establishing multiple independent authorizers and provisions for appealing to state institutions if initial charter applications were rejected. For defenders of traditional public schools, the involvement of locally elected bodies was needed to protect the idea of "common schools," and bureaucratic oversight of charters was needed for quality control.

State laws have designed the role of the authorizer in varied ways, and authorizers have built on those variations in their own practices. The National Association of Charter School Authorizers (NACSA) has blended a more market-oriented approach with the idea that authorizers serve as the governance structure that attends to the *public good* aspect of charters. For example, they identify both maintaining high standards for charter schools (e.g., in school performance, fiscal management) and upholding school autonomy as central authorizer responsibilities (NACSA, 2018). The structure of authorizing in a state can also shape the politics around charter schools. For example, in New Orleans, the RSD became a focal point for tension over the loss of local control, although that has abated more recently.

Despite the attention on authorizers, research on their practices and the connection between authorizing and student outcomes is still limited. Research on practices has suggested that authorizers vary in their approaches (Bulkley, 1999; Finnigan et al., 2004); may work with third-party evaluators for approval decisions (Bross & Harris, 2016); and at times attend directly to issues of equity in approval processes (Eckes & Plucker, 2013; Garcia & Morales, 2016). Studies that have looked at the connections between authorizing and student achievement have also had mixed results, with some finding minimal variation by authorizer (Carlson, Lavery, & Witte, 2010) and others finding differences between authorizers (Zimmer, Gill, Attridge, & Obenauf, 2014; Mead et al., 2015; Berends & Waddington, 2019).

New Forms of Schools and School Networks

As stated, early charters tended to be local, standalone schools founded by educators or nonprofit groups that, animated by a particular vision of alternative teaching or curriculum, intended to fill unmet niche markets and catalyze improvements in the traditional system rather than create a broad alternative to that system (Nathan, 1996; Finn, Bierlein, Manno, & Vanourek, 1997). While standalone charters are still prevalent, they have been losing ground to multi-school networks (both EMOs and CMOs) operating in multiple districts and states.

CMOs, "nonprofit organizations that operate a network of charter schools with a common mission or instructional design and shared central office support," shift some decision-making authority and lines of accountability toward the central structure (Farrell, Wohlstetter, & Smith, 2012, p. 499). EMOs may operate similarly, or may focus more on certain aspects of school management, such as administrative services or curricular programming. In both cases, networks may be loosely or tightly controlled. As of the 2011–2012 school year, about 36 percent of charter schools and about 44 percent of charter school students were in EMO- or CMO-run schools (Miron & Gulosino, 2013). These organizations together accounted for 16 percent of newly opened charter schools in 2010 and 39 percent in 2014, with standalone charters dropping from 83 percent to 61 percent (Mead et al., 2015). As demonstrated in the cases above, "CMOs are increasingly building their own advocacy and grassroots capacity" and CMO "growth requires capacity & expertise to navigate policy and political landscape" (Mead et al., 2015, p. 63).

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While CMOs and EMOs are structures found in the governance of charter schools, charters are also increasingly integrated into—and reflective of—the changing form of public schools and public education more broadly. For example, growth in the virtual charter sector, in which students who may be spread across multiple jurisdictions work through online lessons, is happening alongside expansion of public virtual schools that are not charters; of the 528 such schools in 2015–2016, only half were charters (Molnar et al., 2017). Virtual charters have brought their own set of political and governance issues. As they cut across districts and entire states, authority over them can become blurry and the challenge they pose to the history of local school governance even greater than "brick and mortar" charter schools. While research has only begun to address the political role of virtual charters, an effort by advocates to protest the NACSA because of its opposition to low-performing virtual charter schools demonstrates another set of tensions within the charter sector (Huerta, d'Entremont, & Gonzalez, 2009; Molnar, 2015; Kamenetz, 2018).

Charters as a Part of Systemic Changes

In terms of governance, evolving integration of charters with broader reform efforts can be found in the case of PMMs, state takeover districts, and shifts to mayoral control. The old adage, "all politics is local," both resonates and is often missed in discussions of charter schools, where the emphasis around context is often placed at the state level. However, research is increasingly raising questions about the ways in which local actors shape decision-making via policies, oversight practices, and politics. Such research is particularly relevant where a substantial portion of local students attend charter schools.

Many such communities have shifted in the direction of PMMs, which involve "portfolio managers" (usually district central offices) who oversee their "portfolio" of traditional, semi-autonomous, and charter schools in order to address issues of both school quality and community/family preferences (Bulkley, Henig, & Levin, 2010; Hill, Campbell, & Gross, 2012) (see also Chapter 22 of this volume). This has led to explicit integration of charters in places like Denver, where a joint district/charter "Collaborative Council" plays an important role in system-wide decisions, or in New Orleans, Newark, Camden, and Washington D.C., which now offer unified enrollment systems that include both charters and traditional public schools. As with virtual schools, PMMs are another new organizational form that spans the worlds of traditional and charter public schools.

Closely related to PMMs is the expansion of state-run takeover districts, modeled on the RSD in New Orleans, in which a distinct state entity gains authority over persistently low-performing schools (Smith, 2013; Bulkley & Henig, 2015). State takeover districts often look to partnering with charter operators as a way to quickly infuse capacity, but the record to date is somewhat mixed; major charter networks have proven wary about taking over existing failing schools instead of opening new ones that can attract families that opt in to their model, build a school culture from scratch, and be responsible to a single oversight body (Jochim, 2016; Mason & Reckhow, 2016; Glazer, Massell, & Malone, 2018).

New York City highlights the links between charter schools and mayoral control of schools. While mayoral control has been presented as a way to generate momentum and focus around reforming traditional public schools, it has also opened doors to other nontraditional governance structures like charter schools. Mayors in cities such as New York, Chicago, and Washington D.C. have also been leaders in the embrace of charter schools, as they may be less constrained than elected school boards by teacher unions and are more comfortable with market and corporate approaches. What's more, mayors' broad interest in citywide economic and community development makes them interested in charter schools as a tool for holding and attracting highly educated young families that might otherwise decamp to the suburbs. Rather than natural and inevitable, the apparent alignment may simply reflect the fact that many of the first generation mayors in cities adopting mayoral

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control came into office when a pro-charter, pro-market approach to education was dominant. The transition from Michael Bloomberg to Bill de Blasio—and the sharp shift in political constituencies toward charters that followed—provides a critical case for assessing whether mayoral-control cities are inherently supportive of charter expansion.

Although these new organizational forms are most visible in terms of how charter schools are individually and collectively governed, they also have major potential impacts on the politics around charters. Some of these shifts may have made the politics more contentious, while other aspects contributed to an institutionalization of charters into more stable arrangements.

Political Actors in the Charter Sector

Proponents initially framed charter schools as a strategy for taking education decision-making outside of realms dominated by interest group politics. They argued that local school districts and school boards were riven by bureaucratic politics and beholden to teacher unions; thus, districts resisted educational innovations, protected regulations that made it difficult to enact meaningful reforms, and buffered themselves from parent and community demands for higher quality education. Charter schools would be freed from most constraining regulations, accountable to their own boards rather than district school boards, and need not be unionized or subject to collective bargaining, presumably leaving decision-making free to be guided by parent-consumers and evidence about what really worked in classrooms and schools (Finn et al., 1997). This initial framing, however, did not mean that advocates for charter schools could ignore politics, as they needed to get charter laws on the books and "protect" the charter sector from efforts by teacher unions and others to weaken those laws.

The political behavior of the charter sector has evolved over time, partly in response to changes in the political and governance landscape and partly in an effort to change that landscape in its favor (DeBray-Pelot et al., 2007; Henig, 2018). During the 1990s, as a new policy idea, charters did not have a natural constituency of providers and parents. As a result, early efforts focused on lobbying for support at the state level, where legislators and governors were less beholden to teacher unions than elected school boards in large cities (Holyoke, Brown, & Henig, 2012; Moe, 2016). Advocates had their earliest successes and managed to convince legislatures to pass the most supportive laws in states where teacher unions were weaker (Mintrom, 2000; Witte, Shober, & Manna, 2003; Holyoke, Henig, Brown, & Lacireno-Paquet, 2009). While teacher unions generally lacked the strength to kill charter proposals outright, they did appear to influence the provisions of the laws; strong unions were associated with laws that established more regulatory limits on charters, while there was some evidence that the presence of more EMOs was associated with laws with the kinds of flexibility charter proponents preferred (Holyoke et al., 2009).

Charter advocates also found some early success at the national level by framing charters in a way that could garner Democratic support by downplaying the emphasis on markets, vouchers and private sector providers, and counteracting fears that charters would exacerbate racial segregation and economic stratification. So-called "New Democrats," including President Bill Clinton, self-consciously attempted to create such a counter-frame. They argued that charter schools should be understood as examples of the "new" public administration, a more flexible and responsive approach for government but certainly not an alternative *to* government (Henig, 2008).

The charter sector both helped shape and benefitted from the federal emphasis on educational accountability, which NCLB catalyzed and Race to the Top further energized. NCLB put pressure on districts to close or reconstitute failing schools, helping expand the market for charter providers, and Race to the Top encouraged states to remove legislated caps on the number of charters. This period was characterized by a reshuffling of interest group access and influence at the national level. Teacher unions and associations representing traditional school districts lost influence while newly

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influential organizations included some with direct ties to the charter sector (e.g., CER, Fordham Foundation, New School Venture Fund) and others that included charters among the reform strategies they supported (e.g., American Enterprise Institute, Education Trust, Center for American Progress) (DeBray-Pelot & McGuinn, 2009).

By 2010, two related trends helped shift political maneuvering around charter schools back toward the local level. The first was the growing concentration of charter schools in some urban districts, noted above, creating a provider-parent constituency that combined intense interest with sufficient numbers to make a difference. The second was the growing institutionalization of charters into local school governance via mayoral control, portfolio management, contracting for school management, and the less formalized reliance of local districts on charters as a pragmatic option for meeting demand, seeding innovation, and diversifying schooling options. This put the charter sector into the position of regularized bargaining with local school officials, giving them the incentive to use their growing political power to influence the selection of supportive mayors, school boards, and superintendents (Bulkley et al., 2010).

Recent research has highlighted an array of local pro-charter advocacy groups. Even within a single city, there can be multiple groups with differing missions and political styles. In some cases, individual schools or networks can be the focal point for mobilizing, as with Success Academies in New York City. The New York City Charter Center, which bills itself as having launched "the country's first citywide charter support strategy," attempted to represent all charter schools in the city and relied on research, policy, inside lobbying, and public communications (New York City Charter Center, 2018). More recently, a group of standalone charters formed its own organization deliberately deemphasizing corporate models, appeals to competitive markets, test-based accountability, and "no excuses models in favor of a mission oriented around community, equity, collaboration, diversity, quality and innovation" (Coalition of Community Charter Schools, 2018).

Importantly, recent research has also revealed that many local advocacy organizations are embedded in networks including national advocacy groups, think tanks, and foundations. DeBray et al. (2014), for example, mapped connections between locally based, pro-charter groups in New Orleans (e.g., Educate Now!; New Schools for New Orleans), state-based charter and education reform organizations (e.g., Louisiana Association of Public Charter Schools; Stand for Children, Louisiana), and national reform groups (e.g., Teach for America, Black Alliance for Educational Options). These emerging networks incorporate actors oriented around a cluster of education reforms including charters, data accountability, and alternative teacher certification. They represent a large and increasingly muscular group running and servicing charter networks and standalone schools, and marketing educational and support services to traditional public schools, think tanks, and advocacy groups with influence on education policy at multiple levels of government and within both education-specific and general-purpose political arenas (Bulkley & Burch, 2011; Au & Ferrare, 2014). At times, those networks can activate to provide financial and political support for state and local candidates who back charters, choice, and the broader array of related education reforms (Reckhow, Henig, Jacobsen, & Alter Litt, 2017). Incorporated within this broader movement, the charter sector gained allies beyond its own parents, but possibly at the cost of having its specific set of interests less dominant.

Private Money for Leveraging Change

Private funding, via venture capital investment and foundations, has been important to the charter school movement from the start. As with the political behavior of charter sector advocates, the strategy and focus of private giving have evolved over time based on changing conditions and organizational learning. One key feature of that change has involved growing attention to governance and politics as necessary adjuncts to what was initially seen primarily as charitable support for innovation or for building an education market by seeding the expansion of charter operators.

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Private support for charters initially focused on getting charters up and running, with individual donors and smaller foundations seeking small bore change through creating and sustaining small schools, and larger foundations pursuing bigger aspirations, such as supporting an ideological commitment to free markets and family choice (e.g., Lynde and Harry Bradley Foundation, Walton Family Foundation) or using charters as a pragmatic tool in broader systemic reform (e.g., Bill & Melinda Gates Foundation). Just as some conservative foundations gravitated to charters after largely frustrated efforts to promote vouchers, private capital gravitated to charters after experiencing financial and political difficulties in establishing for-profit private school networks (Abrams, 2016). Some companies, like Edison, pivoted toward charters as a more politically viable vehicle and applied to run them directly (when allowed under state law), shielding themselves from criticism because these were formally public schools. More commonly, EMOs stayed one step further behind the curtain—providing management and other services to nonprofit charter schools in return for a fee.

Regardless of animating vision, the early efforts sought to "let a thousand flowers bloom" and get as many charter schools as possible approved in the belief that parents and others (policymakers and investors) would like what they saw. The Walton Family Foundation was among the most aggressive in seeding charters; in 2016, before it shifted to a more focused strategy, Walton claimed to have supported one-quarter of all charter schools in the nation (Rich, 2014). This was seen in part as a way to make charters less threatening to a public that was accustomed to a traditional vision of public schools and therefore wary of alternatives (Moe, 2004). It was also seen as a way to build an evidentiary base for the benefits of school choice; from the beginning, some supportive foundations funded research and evaluation as a strategy for documenting that charters and choice could promote educational quality without undermining educational equity (Henig, 2008). Compared to vouchers and chains of private schools, then, the step toward supporting charters was a first step away from the vision of a sector operating outside of and in opposition to government and politics to one in which political feasibility was recognized as a constraining force. As the charter sector evolved, its relationship to public sector governance and politics became even closer.

A handful of foundations played a major role in this evolution. First, they discovered that lobbying and interest group politics, particularly at the state level, could advance the expansion of the sector even before there was clear evidence of market demand. New Orleans became the most dramatic example of how supportive state action could rapidly inject charters into a big city environment where local politics was resistant (Buras, 2014; Burns & Thomas, 2015). And they discovered, through charter advocates' rapid success in convincing state legislatures to adopt charter laws, the advantages of political advocacy. One analysis of the role of foundations in promoting charter and voucher legislations at the state level concluded that new foundations, but not old ones, "behave like interest groups" acting strategically to target state governments where they have the greatest opportunity for influence (Finger, 2018, p. 312).

Second, foundations gradually recognized that local politics and governance were also valuable contexts for growing the sector. Charter advocates initially assumed that local districts would be irretrievably hostile, but they discovered that was not always true. Recall the New York City case. A governance reform—mayoral control—provided an opening in part because their broader constituency made mayors less beholden to teacher unions than was the typical elected school board. Seeing this, major foundations like Gates, Walton, and Broad targeted a disproportionate amount of their education funding to cities with mayoral control (Reckhow, 2012). While critics saw districts' growing ties to the charter sector as an undesirable expansion of privatization and corporatization, the contracting model on which it is based also elevated the importance of local public officials as the key grantors of access to local markets. This further drew the charter sector into the political realm (Henig, 2010). Walton's strategic reorientation in 2016, for example, saw them pull back on their broader efforts to concentrate instead on funding within a smaller number of localities marked by more conducive local government and politics.

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Finally, foundations shifted to incorporate grassroots advocacy into what had heretofore been primarily elite-oriented engagement with politics and governance. They found that, in places such as New York City and Washington State, elite support was inadequate. Recall that in New York City, charter advocates lost influence when their charter ally left mayoral office and a charter skeptic took over. And in Washington State, one contributing factor to the 2012 pro-charter initiative may have been the development of the network of groups that provided a coordinated strategy linking individual and foundation donors, charter advocacy groups, and other interest groups with broader education reform agendas. This transition toward incorporating a grassroots advocacy element also reflected general trends in the world of philanthropy that included a shift toward more strategic giving (Reckhow & Snyder, 2014; Tompkins-Stange, 2016; Callahan, 2017).

Concluding Thoughts: The Maturation of Research on Charter Governance and Politics

Early research on charter schools tended to be descriptive and animated by the notion that the charter sector was distinct from the traditional institutions and processes of public education, driven by markets rather than interest group politics. In contrast, the emerging literature highlights ways in which charters are part of changes happening within and to the traditional sector—including things like state takeovers and accountability interventions, mayoral control, portfolio management models, the influence of philanthropies, and racial and class politics. And rather than simply juxtaposing charters as representing markets and competition versus traditional systems driven by interest group politics and majoritarian electoral institutions, the emerging literature considers the charter movement as a sector that engages both internally and externally in coalitional and electoral politics.

As charters themselves are becoming increasingly integrated into broader dynamics relating to governance and politics, so too has the relevant research become more closely tied to a wider scope of focus. We see two consequences for the future of research in this area. First, we anticipate fewer studies and researchers narrowly focused on charter schools as a discrete phenomenon. Rather than specialists in *either* charters or traditional districts, we envision more scholars focused generally on education politics and governance and attending to both sectors, including distinctions between them and ways in which they interact and overlap. Second, we anticipate fewer studies framed in terms of sharply contrasting theories about markets versus government. Instead, we see signs that the emerging research increasingly draws on and applies theories and concepts that emerged in other areas of political, organizational, and social analysis, such as venue-shopping, policy feedback, and institutional isomorphism. We see this shift as a generally positive change that allows research involving charter schools to contribute to research on educational politics and governance more broadly. That said, although there are signs of convergence on some findings, the field is still highly contested and some important areas of inquiry are only just beginning to come under the microscope.

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