

EVALUATION OF THE WISCONSIN CHARTER SCHOOL PROGRAM

2000-2001

Introduction

Charter schools have become an important educational reform in Wisconsin as well as in most other states. In 2000-2001, 92 charter schools were in operation in Wisconsin. In the United States as a whole, over 1600 charter schools are currently being implemented.

The premise of the charter school movement is that when a school is freed from typical regulations, it will have the autonomy to create innovative programs that better serve its students and parents which will result in improved student performance. Further, the successful innovative programs that the autonomy produces will serve as models for broader educational reform.

For charter schools to justify the elimination of typical district and state regulations and to fulfill their promise, accountability is essential. Although individual charter schools and their chartering agencies are obligated to conduct evaluations of the innovative programs of the schools, a statewide, longitudinal evaluation of Wisconsin charter schools provides an understanding of the overall nature and impact of the charter school reform in Wisconsin.

Purpose

The general purpose of this evaluation is to provide a description of the innovative programs and intended accountability procedures in selected Wisconsin charter schools and assess the effects of Wisconsin charter schools in improving student achievement.

The specific questions that the evaluation addresses are the following:

1. What is the nature of the innovative program of the charter school?
 - a. What type of innovative program has been identified?
 - b. What goals is the innovative program intended to achieve?
 - c. What is the philosophical or empirical support for the innovative program?
 - d. How is the innovative program being implemented?
 - e. What are the perceived effects of the innovative program?

2. What academic accountability procedures have been established by the charter school?
 - a. Does the accountability focus on ends rather than means?
 - b. Does the accountability define and make clear the role of the sponsor?
 - c. Does the accountability result in specific and precise accountability agreements with the sponsor?
 - d. Does the accountability identify the sponsor's responsibility for insuring academic performance and sanctioning for failure to meet agreed upon standards?
 - e. Does the accountability insure that data about performance is publicly available and disseminated according to a plan?
 - f. Does the accountability provide a means by which the charter school can be used as a model of reform?

3. What levels of academic achievement have charter schools attained?
 - a. How do achievement test scores of charter school students on the required 3rd, 4th, 8th, and 10th grade state achievement tests compare with those of non-charter schools in Wisconsin?
 - b. What are the interactions between achievement test scores of charter school students on the required 3rd, 4th, 8th, and 10th grade state achievement tests and the variables of school location, race, disability, SES, and sex?

Methodology

Data regarding the innovative education programs, and their effects, of selected charter schools were obtained through questionnaires, observations, interviews, and document analysis. Data regarding achievement were obtained through achievement test analysis.

Selected Charter Schools

The longitudinal evaluation design specifies that five schools be evaluated each year and that the selected schools have been in operation for a minimum of two years. As a group, the schools should include all grade levels at which state achievement tests are given. Further, they should encompass a variety of enrollment sizes, minority enrollment percentages, chartering sponsors, and geographic locations.

Table 1 identifies the five charter schools that have been selected for evaluation and shows that the selection criteria have been met. All of the schools became charter schools in 1998 or before, grades pre-K to 12 are represented, school size varies from 32 to 289, and minority enrollment varies from 3% to 79%. One of the schools, Highland Community School, was a private school before becoming a charter school.

Data Collection

Data were collected from January through May, 2001. Questionnaires were distributed to charter school principals and teachers in January, school visits which consisted of classroom observations and interviews were conducted in February through April, analysis of charter school contracts and other documents was carried out in February through March, and achievement test score analysis was done in May. The specific instruments or procedures employed are the following:

Principal questionnaire. The administrator of each charter school was asked to complete an open-ended questionnaire that deals with overall goals, type of innovative program, assessment methods, school effects, and school influence. (See Appendix A.) Four principal questionnaires, with Core Knowledge Charter School the exception, were completed and returned.

Table 1
Charter Schools Selected for Evaluation

Grades in School	State Test Grades	School, District, Year First Chartered	Locale, Region	Enrollment	Minority Enrollment
Pre K-3	3	Highland Community School, Milwaukee, 1997	large urban, southeast	100	79%
1-5	3, 4	Spruce School, Oconto Falls, 1998	rural, northeast central	32	16%
K-8	3, 4, 8	Core Knowledge Charter School, Verona, 1997	suburban, south central	289	3%
7-12	8, 10	Affiliated Alternatives, Madison, 1997	urban, south central	225	54%
6-8	8	Paideia Academy, Kenosha, 1997	urban, southeast	63	32%

Source: Enrollment and minority enrollment figures provided by administrators as of January, 2001, except for Core Knowledge Charter School. Figures for that school provided by the Department of Public Instruction as of March 15, 1999.

Note: Minority enrollment for Affiliated Alternatives is based on only 185 students, for whom ethnicity totals were provided by the administrator.

Teacher questionnaire. Teachers in each charter school were asked to complete a questionnaire similar to the principal questionnaire. (See Appendix B.) The questions, again open-ended, focus on goals, type of innovative program, assessment procedures, and general charter school satisfaction. A purposive sample of teachers, reflecting the size of each school, was asked to complete questionnaires: two from Spruce School, two from Paideia Academy, four from Highland Community School, six from Core

Knowledge Charter School, and six from Affiliated Alternatives. All 20 questionnaires were completed and returned.

School visits. After the questionnaires had been returned, a minimum of one site visit was made to each school. The purpose of these visits was to (a) observe in at least two classrooms to understand how the program was being implemented; and (b) hold extensive semi-structured interviews with the principal and at least two teachers to expand upon their questionnaire responses, explain aspects of what was observed in the classrooms, and provide more in-depth knowledge of the charter school. All interviews were tape recorded and all were transcribed in whole or in part. Observation notes were reformulated into expanded narrative accounts.

Document analysis. Each charter school was asked to provide a copy of its charter application, its charter contract, and other documents which describe its policies and practices regarding accountability. These documents were examined using a plan developed by Molnar (1999) to assess charter school accountability procedures.

Achievement test analysis. Achievement test analysis consisted of examining spring 2000 data from the Wisconsin Reading Comprehension Test (WRCT) and Wisconsin Knowledge and Concepts Exam (WKCE) obtained from the Department of Public Instruction (DPI). The WRCT, administered at the 3rd grade level, assesses reading comprehension, prior knowledge, and reading strategies. The WKCE is a version of the CTB McGraw-Hill Terra Nova, administered at three grade levels. Fourth grade receives level 14, 8th grade receives level 18, and 10th grade receives level 20. The battery includes subtests in reading, language arts, mathematics, science, and social studies.

Report Organization

The remainder of this evaluation report is divided into three major sections followed by a conclusion. Part I: Program Analysis focuses on the education innovations of each of the five charter schools. Descriptive case studies are followed by a synthesis. Part II: Contract Accountability Analysis presents and critiques the accountability provisions revealed in the contracts and other documents from the selected charter schools. Part III: Achievement Test Analysis presents achievement test results of Wisconsin's charter schools and compares them to results from Wisconsin non-charter public schools at the 3rd, 4th, 8th, and 10th grade levels.

Part I: Program Analysis

Spruce School: A Rural Community Alternative

Background

Spruce School is a little, red two-room schoolhouse that sits among farm fields in rural Lena, northeastern Wisconsin. A short half-circle driveway and parking lot with room for several cars separate the building from the farm road. Behind the building is an unpaved playground of about a half acre, with several pieces of play equipment and a structure resembling a covered picnic area. The grounds are fenced off from an adjacent wooded area and farm fields. The original school bell remains in the belfry and is still rung every day by pulling on its rope.

The school has operated in this building since the late 19th century, accommodating generations of students, some of whose children and grandchildren attend today. It is one of three elementary schools in the Oconto Falls school district. It became a charter school in 1998. Spruce currently enrolls 32 children: one classroom with five 1st graders and eight 2nd graders; the other with seven, seven, and five in grades 3, 4, and 5 respectively. The ethnic mix is 27 white, 5 Hispanic. Last year's enrollment was 40.

According to the principal, the school board had been considering closing the school because dwindling enrollment was raising the cost per pupil to a level unacceptable to the district. Spruce must maintain an enrollment of 30 to remain viable in the eyes of the school board. The request for charter status had both a programmatic and a financial rationale. Programmatically, the building was important to parents who wished to maintain the tradition of the schoolhouse with its multi-age classrooms and who saw it as a way of supporting the endangered qualities of the rural community. Financially, charter grants could be used for capital improvements that would lower per-pupil costs.

Spruce is staffed by two full-time teachers and a half-time principal, all with state teaching licenses. A teacher who had been at Spruce for many years retired last year, so the current 1st-2nd grade teacher is in her first year at Spruce. It is also her first year to teach. The 3rd-4th-5th grade teacher is in her third at Spruce, her fourth year of teaching. A full-time aide divides her time between the two classes. She is licensed in physical education but has significant experience in the Spruce classrooms. She helps individual students, focuses on special needs, supervises lunch and playground, and spells the teachers. A guidance teacher and Title I teacher split their time among several schools. Parents, especially mothers, are apparently frequent helpers during the school day. The students travel to another school for music and physical education. Table 2 summarizes the teaching license status of the Spruce teachers and principal.

Table 2
Degrees and Wisconsin licenses held by teaching staff at Spruce School

Type of License	Number of Teachers
Regular license; teaching in area and grade level of license	2
Regular license; expired or teaching out of area or level	0
Charter license (in addition to regular license)	0
Charter permit	0
Unlicensed	0
<u>Degrees Attained</u>	
Bachelors - Masters - Doctoral	2 - 0 - 0
Total Teaching Staff	2

Source: Licensure information provided by DPI as of March 9, 2001. Spruce principal provided information on degrees and teaching areas.

Note: Figures include teachers that are full-time in Spruce building. Full-time aide has bachelors degree and lifetime license in physical education, with DPI assignment code as special education aide.

As modest as it appears from the outside, the school is surprisingly rich in its facilities. The building has been extensively refurbished outside, thanks in large part to charter school planning and implementation grants. Outside, vinyl siding covers the original walls. Inside, the classrooms appear to rank in size among the largest in American elementary schools, old or new. Their roominess is accentuated by tall windows, topped with decorative cornice fabric, reaching to ceilings that are approximately 14 feet high. In each room, four modern fans hang from the ceilings along with the fluorescent lights.

The classroom floors are carpeted. The many desks and tables give students numerous places to work. A big, round, comfortably cushioned chair provides a special place in a corner of the 3rd-4th-5th grade room. Both rooms have a modern sink, plenty of counter space, and a plethora of bookshelves that hold a surprisingly large library. The walls are similar to many classrooms, with greenboards, pocket charts, posters, number lines, pull-down maps, projector screens, and so on. Each room has two modern PC's and a printer.

The cloakrooms are used for storage and equipment such as the microwave and the copier. Coats are hung downstairs. The basement, which was also refurbished with charter funds, is the area of both classrooms and includes a kitchen, cafeteria/assembly room, and computer keyboarding lab.

Lena is a farm community whose social and economic patterns, like so many similar places, are gradually succumbing to pressures of modern society such as

agribusiness and suburbanization. The people are not affluent. Somehow, a number of residents have found time to articulate and implement a vision of: (a) continuing and sustaining some of the positive qualities of rural life for and through their children; and (b) preparing the children to thrive in the fast-changing world. The school seems to be a rallying point for that vision, its programs calling upon the community for assistance while it provides opportunities for the community to purposefully gather. Parents, prominently mothers who may work part-time and live on farms that are no longer or minimally worked, spend time helping at Spruce. An advisory committee of parents and teachers meets monthly. Others in the community volunteer skills and materials. Community Ties Nights, held four times a year at Spruce, draw substantial numbers of residents who have no children at the school.

Intended Innovative Program

The overarching purpose of Spruce School is the preservation of the heritage of public education as it was historically carried out in township schools. Three of the school's goals are integral to its purpose:

1. To reflect and support the special character and interests of its rural, agricultural community;
2. To focus on "outdoor learning" and provide a curriculum that is environmentally oriented;
3. To take advantage of the small size of its student body and the mixture of ages in its classrooms.

A goal less directly related to the school's heritage is:

4. To enable students to use technology appropriate to meeting 21st century challenges.

The special curricular practice that is intended to attain these goals is the science-oriented (particularly, environmentally-oriented) thematic unit. Such units are meant to incorporate a full range of skills and concepts in mathematics, English, and social studies.

The advantages of multi-age grouping are intended to be realized through the instructional method of "tiered" learning centers. Each center is to include activities that engage students at several different points on the continua of skills and understandings in a given topic. Field trips are intended to be strong experiential means of realizing Spruce's goals.

Embodying and supporting the community's values is the purpose of Community Ties Nights. At these events, students present or demonstrate some of their work, and particular adults share their special skills or distinctions with the students, parents, and other community members. To enrich the broader community's young people through interdependence and collaboration, Spruce invites students from other schools--

elementary, middle, and high school--to help Spruce students and to share in some of Spruce's activities.

Implemented Innovative Program

Classes are held in the two adjacent classrooms, one with 1st and 2nd grades, the other with 3rd, 4th, and 5th grades. One teacher is responsible for each class. Thus, assuming that the teachers remain at the school, students will have the same teacher for two or three years. One teacher noted that this arrangement forces her to work out, rather than simply wait out, personality conflicts that may develop between her and any of her students or their parents. The principal added, "What a huge advantage to have a child a second year, when you know exactly what that child's strengths and weaknesses are! You can pick up right where you left off." Referring to the teacher of the older class, he said:

By the time she even gets them in the third grade, she knows those kids.... She may not have been their teacher, but from the communication back and forth, we can do a lot of things together.... So, to me, the continuity's there, the stability's there.

The two teachers, along with the aide, coordinate their instructional programs and collaborate in their daily planning. Doing the same theme simultaneously in both classes enables the more senior teacher to help the novice teacher in planning. Each teacher and the aide knows every student. When the principal and a parent are present, as is frequently the case, the ratio of students to adults is only about 6:1. The teachers arrive early and stay late, often minding children who have done the same.

The Houghton Mifflin basal series is used for reading, supplemented by surprisingly large classroom libraries, including multiple copies of some of the books. In 3rd-4th-5th grade, the lunch hour is generally followed by fifteen to thirty minutes of silent reading. Writers' workshops and literature circles are mentioned in a letter (May, 1999) from Spruce staff to the Oconto Falls school board. However, neither activity was seen during the day of observation. For math, Spruce has chosen to use the district-wide adoption, Everyday Math, which they find to be a good fit with their multi-age grouping. Some of the observed math activities had game-like qualities.

On Wednesdays and Fridays the students all spend their first hour at another school in the district for music and physical education classes before being bused to Spruce. A Title I teacher works one day per week at Spruce with children who have difficulty reading. The school has access to district resources for special education. This year, there is one child diagnosed as having special needs.

The organization of the multi-age classrooms has been guided by staff development workshops the teachers have attended. In the 3rd-4th-5th grade room, students receive instruction and encounter learning materials: (a) in a small instructional group of all the children at their grade level; (b) in small, mixed-age activity groups that meet at "centers;" and (c) individually in centers. A center may be at a table, a cluster of desks,

or a counter. The designated center activities range from curriculum-specific games to puzzles to science experiments to report writing. Each child receives an individualized Centers Contract weekly that lists appropriate center activities in each subject area.

In one observed session, the 3rd-4th-5th grade teacher began class after morning recess by stating which grade-level group was to meet with her for group instruction and which center options were appropriate for children of the other grades and for certain individuals. Then, with the instructional group sitting around a large table, she presented a conventional lesson--an introduction to a concept or skill, a review, and an opportunity for guided practice. From that table, she monitored the work of the others, calling or walking over to individuals on occasion to guide them. The aide, when not in the other classroom, also guided children working at the centers.

Centers are said to be “tiered,” meaning that a student at a particular skill level does tasks or takes roles that are different from those of a classmate who is at a different skill level in the topic area. The teacher of the older children elucidated: “There’s no limit to the tier. You don’t say ‘You’re in 3rd grade. You can’t play the 4th grade level game.’” Clearly, students were engaged in differentiated tasks and roles at some of the centers observed. It was not possible to analyze the appropriateness of the tasks for individual students. However, the atmosphere was productive and orderly--almost resembling a well-planned birthday party--as small groups engaged in purposeful interactions ranging from jigsaw puzzles to math games to reading worksheets to preparation of reports. Smiles were common. The carpet was quite free of scraps. Older students willingly worked next to younger ones, readily assisting or quizzing them. Fifth graders who have completed available center work are given assignments reserved for that eventuality or encouraged to do research and presentations on topics of their choice. Their teacher added:

I tell my 5th graders, “If you want to...do a 3rd grade activity for review or because it’s fun or whatever, you go right ahead...” But it does build, so that they’re all learning the same concepts but from their own level.

The 1st-2nd grade class had a more conventional air. When observed doing math, the students were seated in rows, with 1st graders and 2nd graders not intermingled. They did not appear to be working at centers at that time. The teacher used a sort of low lectern on rollers, with a white marker board on its front at the children's eye level. She rolled the lectern to the front of the grade-level group she was going to work with and sat next to the lectern. While she taught them, the other grade-level group sat at their desks and appeared to be doing assignments related to the lesson they had just been given. Two children who had an opportunity to select an activity vacillated. They chose one, flirted with it, left it, and began another before the teacher suggested a third. It was not always possible to observe the extent to which the teachers in either room were aware of the appropriateness of students’ choices of work.

An element essential to the uniqueness of Spruce’s curriculum is the emphasis on science, especially environmental science. Charter funds have been used to purchase

science equipment such as binoculars and outdoor microscopes. Thematic selections are determined with an eye toward state standards and what the rest of the district is doing, sometimes with parental suggestions. The duration of each thematic unit is a month or more. Some of the thematic units have been: gardening and botany, bird study (including making feeders), rocks and minerals (including history of mining in Wisconsin), and fish study (including instruction at a stream from Wisconsin Department of Natural Resources staff and fly fishing taught by high school students).

The teachers attend to topics in state curriculum standards but are allowed to cover them over several years rather than in a specific grade. For some themes the school rents Einstein Kits, large bins of topic-specific science supplies. The teaching of skills and concepts in math, language, and social studies are folded into the science units. Science enrichment is offered in summer school at Spruce.

Field trips appear to be more frequent than in most schools. Trips seem to be planned to elicit participation as well as observation. The 1st-2nd grade was observed hosting a small class from another school on a morning snowshoe trek in the nearby fields. Along with the teachers of the host and visiting class and a parent, the Spruce 5th graders accompanied and assisted the young students. Most field trips include all grades and have been science- and environment-oriented. Destinations have included a national forest and wildlife sanctuaries; activities have included fish study, camouflage study, and dog sledding (led by the husband of one of the teachers). A social studies trip took the students and some parents to the municipal hall to participate in a dry run of the 2000 Presidential election.

The children are encouraged and expected to behave as a “family,” helping each other whenever possible. It is not unusual for individuals and groups to go to the opposite classroom for that purpose. Older children are held up as models for younger ones. The family atmosphere is reinforced by the frequent and welcome presence of parents who know many of the students and their parents. At lunch, children from the two classrooms sit amongst each other.

Parents appear to be particularly active as aides, chaperones, and resource providers. Their ideas are welcomed, as are their inquiries about their children’s work. Formal conferences are held in November and report cards are issued four times a year. The teachers seem very comfortable staying in close touch with parents.

The innovative program of this school extends beyond the school day. A “TV Turnoff Week” has been practiced. Evening programs for children and adults, held four times a year, are related to curricular themes and may include a guest speaker who is from the community and/or an expert in a relevant field. These gatherings, called “Community Ties Nights,” are said to be essential to Spruce’s curriculum and central purpose and to inspire a sense of pride. Invitations are distributed broadly to current and former residents of the Lena area. Attendees are said to frequently include persons who attended Spruce decades ago.

The family-community element of Spruce is further manifested in the utilization of students from the middle school and the alternative high school in several ways. The high school students have actually built Spruce's skeletal "outdoor classroom," a roof on posts that shelters tables and chairs on a concrete slab behind the school building. Students from both schools have come to serve as reading buddies and playground buddies and have instructed students on a fishing field trip. In the words of the principal:

When those two [high school] kids came out to do that Young Angler program... they were so afraid of being up in front of a group. And when [our] kids warmed up to [them]... I couldn't believe the job that they did.

The principal's personal commitment to developing a sense of community extends to overcoming the insular tendencies of other schools by inviting them to share in Spruce activities, such as the snowshoe treks and classes in the outdoor classroom.

Two PC's connected to the Internet are in each classroom. A digital camera has been used--mostly by the principal--to create a wall of photos prominently illustrating many of Spruce's activities. A child was observed using a CD-ROM encyclopedia for a research report. However, the teachers' knowledge of relevant websites and the extent to which such websites are used was unclear. Another child was observed being assisted by an adult to get to an educational website. Although the child was somewhat familiar with the site, left to his own resources he was unsuccessful at determining how to find screens relevant to his topic. In the basement sit enough Apple IIe computers to accommodate students from several grade levels at a time. These are said to be used for keyboarding practice.

Effects of the Innovative Program

Assessment plan. Assessment of goal attainment at Spruce is largely informal and anecdotal, based on means as well as ends. Preserving community heritage is assessed by attending to the degree and quality of participation by the school family in the interests of the larger community and vice versa. Informal feedback--comments, cards, letters--from that participation is welcomed. The goals of effective multi-grade instruction and of environmental learning are assessed by conventional methods of pupil evaluation such as teacher-made and text-based tests; by scores on 3rd and 4th grade statewide tests; by informal observation of stakeholder satisfaction and pupil participation in daily processes; and by wholistically noticing progress over the course of a child's two or three years in one class and five years in the school. Student portfolios are maintained informally but not systematically for assessment purposes. Assessment of the use and teaching of digital technologies appears to occur by informal comparison to what the staff has encountered in the media and in in-service training.

One teacher said that besides giving the written and oral tests that she creates and those from the reading series, she assesses by "a lot of just watching" and by talking with other staff members who come into the classroom. The principal espouses intuitive assessment: "Significant educational experiences can't always be measured.... To see the

expression on those kids' faces, you wouldn't need any more measurement." He holds that appropriate assessment of the program is based in "an emotion that comes from the heart and...the soul. There's something special here."

Assessment findings. Teachers, principal, and parents expressed general satisfaction with how well students' academic needs are being met. Spruce students' scores on WRCT and WKCE have compared favorably with the district's other schools.

Parents and staff seem pleased with the quality of students' social growth, as well. Several parents present during the visit expressed the desire to forestall pre-adolescent "boyfriend-girlfriend" behaviors. They pointed out that such behaviors, especially in the spring, are stopped short at Spruce. They noted that the 3rd-4th-5th grade teacher has spoken openly and directly to the children that those kinds of interaction are inappropriate at school and at their ages. The parents attributed the ability to maintain influence over the social-personal behavior of the students partly to the school's small size and relative isolation. They said that because of the mixture of ages, the younger ones hear what the older ones are told. They also believe that social pressure among older students is redirected because their attentions are so often directed on their younger peers. The principal concurred, saying:

In most elementary schools, if you're a 5th grader, you're too cool to hang out with a 3rd grader. In this school, we have 5th graders who are always the helping hands. They learn what community's all about, what cooperation's all about....They always look after the little ones. Like when we go...snowshoeing...you all have a little one for a buddy.

Community Ties Nights have been characterized as extremely well-received and well-attended, not only by parents and grandparents but by former Spruce students, their relatives, and persons who live or work in the vicinity. Science activities and outdoor learning experiences were described with pleasure by parents as well as staff members. The activities seemed varied and enjoyable, although no formal assessments of those experiences were discussed. The staff members believe it would be valuable to have more computers but also that they need more training to use them effectively.

Charter school influence. In addition to coverage in the district's newsletter, aspects of Spruce's program have been publicized "numerous" times in the local newspaper and twice by television stations in a nearby city, according to the principal. A presentation about the school has been made at a conference of the Wisconsin Charter Schools Association.

Conclusion

The mission of Spruce School is to preserve positive values that were embodied in the lifestyle, social intercourse, and education of rural Wisconsin from the late nineteenth to the mid-twentieth century, while at the same time teaching and utilizing current advances in science and technology. The school's interrelated goals are conscientiously

embodied in a distinct program of curriculum and instruction that is clearly articulated and the elements of which are quite readily observable. It may well be that small, multi-age classes, in a small school, situated in a relatively isolated locale, with parental involvement can encourage positive kinds of social conformity and deter premature sophistication.

The principal has stated that most elements of the school's program have not yet been fully implemented. Nevertheless, it appears that they are consciously pursued by teachers, principal, and parents. Except for the computer element, they seem well along in their implementation. Effective use of technology seems to be the goal least realized or integrated into the school's program so far. The teachers and principal are correct in saying that they need more training to use computers effectively.

Students appear happy and seem to work willingly and eagerly. No instances of negative treatment of younger students by older students were observed. In the only disciplinary incident observed, an older child who was not permitted to go on the snowshoe trek, apparently for lack of appropriate outdoor clothing, seemed satisfied to read and do worksheets in the classroom. Each child is likely to be well-known by both teachers, the principal, and the aide. Students appear to be given opportunities to work at appropriate levels without stigma and with peer support. The tiered learning centers appear to be a realistic method of providing differentiated instruction to meet individual needs. Their effectiveness should increase with the experience of the teachers.

Given the emphasis on science, it is not clear what aspects of other subjects might be prone to omission. Social studies appears to be covered more informally than other subjects, with reports and projects but less of a deliberately planned sequence. The boredom of textbook-based history and geography may be avoided by this approach, but the potential richness of the subject could be more productively tapped.

There appears to be a smooth working relationship among the parents, teachers, and principal. The teachers--by their collaboration, their efforts to implement a program that reflects Spruce's goals, and their willingness to put in long hours--appear to be fully committed to the intent of the charter school. They are relatively inexperienced, and staff development has been important for them. If they are to grow professionally, it should continue, perhaps including opportunities to observe and even to teach in other schools.

Although results on standardized tests in 3rd and 4th grades apparently have been satisfactory, the principal passionately contends that measurement cannot characterize the essence of a child's growth or a school's effectiveness. The extent and breadth of parent and community participation at Spruce seem to attest to an acceptance of that contention. The quarterly evening programs where students, parents, and community members all play roles are important as an organic activity of the community--somewhat as the square dance or quilting bee of times past. If standardized test scores were low, however, the school's effectiveness might be challenged. Because Spruce is such a small school, the instructional program is relatively clear to a professional observer. Therefore, from time

to time, ongoing assessment of the program could be strengthened by feedback from professional observers.

Spruce did not ask to be allowed flexibility over and above that of other schools in its district, permission to cover science curriculum without a year-by-year sequence was not a major concession from the school board, and the board did not demand more rigorous accountability. It appears that the crucial element in attracting both Spruce and the school board to the charter program was the financial incentive of the charter school planning and implementation grants. The grants were largely used to refurbish the building, making it more efficient and hospitable, and to purchase science equipment. Therefore, the charter agreement for this school does not appear to constitute an exchange of accountability for autonomy but rather an exchange of resources for economic efficiency.

Although the goals of the program are clear and parents play major roles in the ongoing character of the program, the vision and energy of the principal appear to be a significant part of the fuel that drives the program at the present time. Experience is likely to make the program easier to implement. It would seem, however, that keeping a clear record of how the essential elements of the program are carried out would be important for maintaining the program when key contributors leave. The current practices of (a) presenting written progress reports to the school board, (b) re-working goals before each new school year, and (c) printing the minutes of the parent-teacher advisory committee probably provide a significant part of that record.

Because Spruce is the only elementary school in the district without a kindergarten, and parents often maintain enrollment where their child begins, its absence may be a handicap to Spruce's enrollment. Even though residential construction in the vicinity is likely to increase enrollment applications, new residents may not share the communal interests of the Spruce family. With encroaching suburbanization and economic change, it is unclear how long a sense of community can survive in Lena or the school succeed at its goals. For the present, however, the staff and volunteers at Spruce have seen to it that their facility is extremely well equipped and that it uses the material, cultural, and human resources around it to the advantage of the children and the community. The unique and organic qualities of Spruce's program warrant dissemination beyond local media and charter school forums. It could inspire community-oriented schools in other locales, rural and otherwise.

Core Knowledge Charter School

Background

A study of the direct instruction method was carried out in a school in Verona, WI, by University of Wisconsin researchers, but the school decided not to adopt the program. The program attracted the attention of some Verona parents, however. Concerned about inconsistent curricula across schools in this rapidly growing district, the parents also became interested in the Core Knowledge program advanced in E. D. Hirsch's books on "cultural literacy." The two programs became the basis for the parents' application to start the Core Knowledge Charter School (CKCS).

Today the school includes grades K-8, with two classes per grade in K-5 and four middle school teachers. CKCS is housed in a portion of an operating middle school--a bright, modern building on a large plot of land. This is hoped to be its permanent site. In the course of its five-year existence, CKCS has been housed in available space at three different operating schools. At one time, CKCS was split between two sites. This odyssey and has resulted in various hardships. The present site provides sufficient classroom space but requires physical adaptations that are yet to be completed for the elementary children.

Direct instruction (DI), as described in the school's literature, is a teaching method in which "subject matter is taught by the teacher in a direct fashion." It is:

designed to teach learning strategies, rather than isolated bits of information or facts...by breaking all skills down into smaller component skills, which receive highly explicit, teacher-guided attention when they are introduced.... The emphasis of instruction shifts...to fully independent application...only when students master the skills at each phase, thus teaching to mastery is a critical component.

According to the school's literature, research in direct instruction has found that the method can result in long-term retention of high-level thinking skills.

Core Knowledge philosophy advocates that children should learn a particular set of facts and skills which are most important in American culture. According the school's literature, "the Core Knowledge Sequence is a detailed and systematic curriculum content guide for each grade level that can be taught consistently year after year." The curriculum is "spiral" in that topics re-emerge with greater complexity from year to year.

The faculty is very experienced, with many teachers licensed in special education. Nearly all have current charter licenses, permitting them to teach at all levels and in all areas. Prior to coming to CKCS, some of the teachers had had experience using direct instruction with special education students or had taken classes about DI and were attracted to it. Although three-quarters of the middle school teachers were new to the school this year, the elementary faculty has been more stable. The license and degree status of CKCS's teachers is summarized in Table 3 .

Table 3
Degrees and Wisconsin Licenses Held by Teaching Staff at Core Knowledge Charter School

Type of License	Number of Teachers
Regular license; teaching in area and grade level of license	3
Regular license; expired or teaching out of area or level	1
Charter license (in addition to regular license)	14
Charter permit	0
Unlicensed	0
<u>Degrees Attained</u>	
Bachelors - Masters - Doctoral	n.a.
Total Teaching Staff	18

Source: Licensure information provided by DPI as of March 9, 2001.

Note: The number for total teaching staff includes the curriculum coordinator. It does not include art, music, or physical education teachers, or the 3 instructional aides. The school did not provide information on degrees. DPI listing of the reported range of grades actually being taught does not in all cases include all grades stated in information provided by the school.

Parents have played strong, hands-on roles in the governance of the school. Some of the parents who started CKCS in 1996 have continued to hold positions on the school's governing council. The Verona school board recently renewed the school's charter for a second five years. In that process, friction over the appropriate degree of control parents should continue to have--in governance, administrative decisions, and financial decisions--led the board to change the required composition of the governing council, making it perhaps somewhat less subject to the opinions of the most active parents.

The school has been embroiled in political controversy and conflict from its beginning. Opposition from segments of the Verona community has arisen toward the school for various reasons. A CKCS faculty member suggested that there may be a sense among some in the district that the school is elitist because not all children can be admitted or because its enrollment of minority and disabled students remains low. A class-size cap of 20 in K-5 and 22-23 in grades 6-8 apparently limits CKCS's ability to enroll new students, but that cap applies to all Verona schools. Animosity may also be fueled by the unusual instructional methodology or the success of CKCS students on standardized tests. An active "rumor mill" was cited by a faculty member. CKCS stakeholders feel that there is a perception by some school board members, parents, and teachers in the district that the school is a competitor and an opponent to the concept of the common school. A second charter school in the district is apparently quite different

from CKCS in its curricular and instructional profile. However, it was suggested that some educators may feel threatened by the possibility that more schools might “go charter” and be subject to micro-management by activist parents. (District sources outside the school were not consulted for this report.)

Intended Innovative Program

The goals of CKCS, as stated in their informational brochure are to:

- Focus on academic excellence.
- Utilize proven curriculums, programs and materials.
- Prepare students to compete in the global economy.
- Provide all parents, students and teachers in the Verona Area School District with a choice in academic approaches.

“Academic excellence” and preparation “to compete in the global economy” are ends, or product goals. “Proven curriculums, programs and materials” and “a choice in academic approaches” are means, or process goals, which clearly suggest that Core Knowledge and direct instruction are at the heart of the school.

Questionnaire responses by faculty members revealed a somewhat different set of goals. The curriculum coordinator ranked those goals and considered the three primary goals to be:

1. Mastery of strong learning skills and academic excellence.
2. Broad knowledge in literature, history, science, geography, and the arts.
3. Parental involvement.

Goals also listed by faculty members are:

4. Enjoyment of school and the development of lifelong learning interests.
5. Values and character.

Implemented Innovative Program

The rules are the same in all classrooms, with a result that students cannot play off differences when they move from class to class. The entire school had followed the Core Virtues curriculum, focusing on a single virtue (e.g., diligence, honesty, compassion) for perhaps a month, then all moving on to another in identical sequence. After doing so for one year, the teachers decided to each follow a sequence that seemed to meet the needs of their own students. However, after a year, the original plan has been resumed, apparently because the faculty agrees that a mixture of virtues cannot not be adequately reinforced in common areas such as art, physical education, cafeteria, playground, or the library.

Elementary grades. The day is scheduled so that DI in reading, math, spelling, and written expression occurs in the morning. The rest of the curriculum--including music, art, physical education, and Spanish by specialists--is taught in the afternoon. According to a faculty member, "In-seat learning time...surpasses...other elementary sites in the academic areas. And we hold steadfast to the fact that that can only happen in the AM hours."

In order to group students homogeneously according to the level they have reached in each subject, all the elementary classes are scheduled to have the same subjects at the same time. Students might change rooms and teachers several times during the morning in order to be in the appropriate group for their level in each subject. The grouping is initially determined by pre-testing at the beginning of each school year. Scores on frequent skill assessments generally determine whether students will remain in their present group or move to a different level. (The actual flexibility of grouping could not be observed.)

Each elementary teacher works with one or more groups per class period. Aides trained in the methodology also teach groups in the morning. Trained parents often check and grade student work and administer reading fluency "checkouts." The elementary teachers collaborate as needed and meet weekly after school. One elementary teacher noted that the length of staff meetings is not limited by the teacher contract. "We're dedicated to what we're doing. And we do it because of the students. We're not told we have to meet and talk..." Additionally, the elementary teachers meet with the middle school teachers several times a year and keep in touch with them as necessary, sometimes via using paper memo, voice mail, and email.

The curriculum coordinator does three main types of work critical to the functioning of DI and Core Knowledge. First, she observes instruction and learning to see if students are mastering content or not. Second, she trains and coaches teachers on DI method, pace, and meeting students' needs. Third, every Friday each teacher of DI hands the curriculum coordinator four sheets of students' scores on the various mastery tests and checkouts. She takes them home over the weekend to analyze students' progress and determine their appropriate placement.

The K-5 curriculum in reading, math, and written expression follows sequences specified in direct instruction textual materials. Before introducing cursive writing in grade 3, D'Nealian italic handwriting is taught. Curriculum for K-5 in history, geography, science, music, and art is essentially that of the Core Knowledge Sequence. A teacher who does DI in the morning is likely to use its principles (e.g., frequent review) when teaching CK.

The goal of mastering strong learning skills and academic excellence is elaborated by one faculty member's description of the expectations for kindergarten:

Kindergarten turns out to be a vastly different experience and achievement level than [other schools], where it's a chance for kids to have fun and find themselves.

We're more concerned about kids learning to read at a higher rate, to calculate, problem solve, even in those early formative years.... It's kind of out-of-the-blocks learning versus letting the kids kind of feel their way around.

The curriculum after kindergarten similarly reflects a valuing of rapid progress. For example, book reports and reports on states--assignments generally characteristic of 4th or 5th grade--are part of 2nd grade at CKCS. The "reasoning and writing" program, which follows a text series published by SRA, has qualities unique to writing curricula. It starts in 1st grade, teaching reasoning skills before applying them to writing. In addition to encompassing grammar and writing with clarity, the program includes deductive reasoning.

A primary grade teacher noted that homework includes a certain amount of reading time every night, an amount that increases in the second semester. Homework assignments may be contextualized. For example, when studying the food pyramid, students were assigned to plan a balanced breakfast, lunch, and dinner. An upper elementary teacher explained that he has no Core Knowledge science or history textbooks. Rather, he is given the sequence of topics and goals. He often uses lesson plans shared by other Core Knowledge schools, as well as developing his own activities. Computers are used to teach graphics (beginning in 1st grade), keyboarding (beginning in 2nd), and use of the Internet (beginning in 3rd).

In DI, tests and check-ups are given very frequently. Student mastery of a concept is defined as answering correctly 70% of questions on material that is newly presented, 85% on mastery tests, and 90% on review material. Mastery is required in order to advance to other concepts.

The strikingly rapid pace and conformity that characterize DI may raise concerns about how individual needs are met. A faculty member explained:

The pace is really rapid, and that's what keeps it going.... I only wait til there's one person who's not finished. We just go on, because they seem to realize I'm not going to wait for them. And that really keeps people up to pace.

During choral response, a teacher may hear an incorrect answer or notice that a child seems to be drifting off. The student may be helped or at least brought back to attention during the frequent "individual turns." Faculty members argued that individual turns allow them to pick up any weaknesses. If students do not do well when they are focused on in that phase of the lesson, the teacher will work with them at another time, perhaps during silent reading. They might repeat lessons or go through a "remedial loop of some sort." Having to constantly wait for a child indicates that the work "may be too hard for them." They may be sent to a lower group. On the other hand, children who excel are given "skip lessons" or "fast cycle programs." In math, for instance, the steps they take are small, but the intent of group is that pupils are not bored or given work that is too hard.

One faculty member felt that except for students with “very, very low IQ,” there are none--even those with hearing disabilities--who would not learn the material by going back through the lessons. “I have never found somebody that didn’t get it after constantly going over the same [concept], because the way the lessons are taught, it’s a great way of [going from] small pieces to large pieces.”

Two 2nd grade classrooms were observed, a reading class briefly and a math class at length. Both were engaged in direct instruction. In the first class, four students worked at a table at the back of the room with an adult (presumably a parent or an aide), while eight stood at the front, responding together in a 2nd grade reading lesson. The teacher, standing close to them, held a large-print instructional book in front of them. She called first on her whole group to read parts of words--graphophones--and then the entire words. The group did so. Immediately, a girl was called upon to read the parts and words by herself. When the child erred, the teacher told her she was not correct and said the word correctly. The girl said it correctly, went on to another word, and was then directed back to the one she had missed. She made the same error, and the process was essentially repeated. It appeared as though the teacher was badgering her, but the child’s experience of this process and her feelings were known only to the child. During this lengthy turn, some of the children appeared to be attending and others did not.

In another 2nd grade room, a class of thirteen children included two or three minority students. Their desks faced the front, three and four abreast on the carpeted floor. A parent checked workbooks at a table in the back. Strips of sayings festooned the back wall above her. Stretching out above them was a timeline that ranged from 500 BC to 1000 AD. On the wall at the front near the chalkboard was a sticker or stamp chart of home reading for the 9-week period. About 99% of the squares were filled in. On a side wall was fastened a huge National Geographic world map, framed and covered with plexiglas. A dream catcher and one or two other small objects hung from the ceiling.

The teacher was at the front, moving around, writing on the board, stepping closer to individual students. Organization was stressed: “Let’s see who’s organized....Worksheet on top of workbook....Put your name on your worksheet....Raise your hand when your name is on it....Good job.”

A one-minute timed test of math facts on a printed sheet--addition for some, subtraction for others--was about to be given, but first: a one-minute timed *mental* test of the same facts using the sheet. Students have been taught and are expected to use their fingers to keep themselves in the right place. A middle school girl who was there to help would walk back and forth behind the students throughout the period, looking for any whose finger was not pointing properly.

Next came a review of a skill. The teacher asked a girl for the “rule” when adding nine. The girl spoke inaudibly and did not seem to know. The teacher gave her an example. The child still spoke inaudibly. The teacher asked another child, who answered correctly. The teacher wrote “5 + 9” on the board.

“Listen: Five plus nine. Get ready. Answer.”

“Fourteen,” most of them answered in unison.

The teacher gave individuals several similar examples, they answered correctly, and she responded, “Good,” or “Good job” to each. “What’s the rule for *subtracting 9*?” She called on another girl, who gave a specific example. The teacher elicited the generalization from her. The sequence was then the same as the previous one: readying the group to respond chorally, getting their response, then posing examples for individuals to answer. A girl answered incorrectly, and the teacher simply said, “No.” The girl corrected herself. “Why is it 5, dear?” The girl answered correctly.

Without further ado (except perhaps certain visual signals recognized by the group) the teacher told them to open their workbook. Rapidly she read the directions for a set of exercises in subtraction with borrowing.. “Now do them.... I know you’re ready when you have your red pen ready.” She demonstrated one at the board: “Seven minus eight. Everyone, can you work that problem?”

“No!” in unison.

A boy with sometimes atypical behavior said something extraneous. “No sounds, please,” she said to him.

A child caught a mistake she had made. “Thank you,” and she smiled. They did another example with her. “Now everyone do the third problem by themselves.” She asked for their answer. “Good job.”

The upper-grade assistant handed out rulers. The teacher cautioned matter-of-factly, “I’ll have to take rulers away if you’re touching them.” She followed a similar procedure for a brief set of mathematical reasoning problems. The pace was rapid, but her manner was not overbearing. “Oop! I have to take this ruler away, and this one,” she said as she swiped two and put them on her counter.

Three types of examples, different from those already encountered, appeared on their workbook page: greater/less, coordinates, and areas of rectangles. She directed the group back and forth among textbook page, workbook page, and worksheet. “You don’t have your text open, dear... Everyone touch the starting dart.... Everyone touch ‘d’.... Good touching here!” Nearly every student was on task. (One boy was touching his shoe. She tapped him and pointed to the place on the work page.

The teacher demonstrated the proper way and the wrong way of lining up addends in columns. She walked around checking individual work, helping with columns. Soon she initiated choral responses again. “You don’t have to yell, but I want to hear from everybody.... That was a little dead. Again. Get ready....” Soon she said, “I want all pencils and pens down.” A girl pointed out her page with only one error. “That’s wonderful,” said the teacher and announced the accomplishment to the class.

Math had been going on for quite awhile, with no blatant signs of restlessness. The group was directed to begin “independent work”--silent seatwork using their notebooks. “Don’t think you’re finished when you’re done with that.” The teacher walked around checking and pointing out errors. Seeing a page had been completed, she clipped off the corner and marked the page with a star or “Great.” Because DI incorporates review into the daily lesson, at least five different math concepts were practiced during the 45 minute lesson.

Although not all students answered every time in choral responses, the degree of participation seemed very high. The instruction was highly scripted and regimented, yet the teacher’s manner seemed natural and professional. Using words, pace, and sequence characteristic of DI, she managed to give personalized responses to children’s individual questions.

Middle school. In middle school, too, all students take the same subjects at the same times. In math, for example, there were three groups: one working at 5th-6th grade level, one at 6th, and one at 7th-8th. The upper and middle groups were expecting to reach algebra later in the year; the lower group was hoping to reach grade level. The upper and lower groups met in the same classroom, where the teacher worked with the lower and a highly regarded aide worked with the upper. The middle group met in another room. A typical middle school teacher’s daily schedule includes four different Core Knowledge preparations, one DI class in spelling or vocabulary, a tutorial (a study hall with tutoring), a period to meet with all the other middle school teachers, and a planning period. In addition, a middle school staff meeting is held one morning a week.

A faculty member noted that in the middle school, content differs from other schools more than does instruction. The Core Knowledge Sequence--using primarily materials produced or endorsed by the Core Knowledge Foundation or related organizations--is followed in grades 6-8 history, geography, literature, science, music, and art. Teachers do create some of their own materials, and their Core Knowledge lesson plans include the teaching of prior knowledge and vocabulary. Checklists of topics based on the sequence help them manage their instructional time. The new Baltimore Curriculum, which applies direct instruction to Core Knowledge subject matter, has been introduced as a resource, and some teachers have begun to use it. After completing 6th grade DI math, students are placed in Saxon math. Similar to DI, Saxon incorporates cumulative review and teaching to mastery, but it is not scripted. Instruction in word processing begins in 6th grade, and use of the Internet continues.

A 6th grade literature class was observed. In a carpeted room, about 25 high-school-type desks (the kind with writing surface on an arm connected to the seat) faced the front. On the walls were several instructional posters, a commercially made timeline of events, and a set of student-written haiku. A green chalkboard, shelves of textbooks and teaching materials, three computers, a printer, and various other artifacts filled out the room. Fifteen students, the most advanced 6th graders--none of color in this group--entered the room.

Although the class follows the Core Knowledge curriculum, this teacher feels free “to do something different so they don’t get bored.” She led them in a game to review for a test on a piece of juvenile literature they had recently completed. Three teams competed by answering factual and vocabulary questions posed by the teacher about the story. Team members were encouraged to first try to answer on their own, then to confer with their teammates, if necessary, for fewer points. A chapter and point value were selected and a question given:

“I would like chapter 15 for 30 points.”

“What was Karina making in this chapter, and why?”

Students appeared to be engaged, entirely cooperative, and highly successful. The teacher was in control, but her affect was friendly and sportive, conveying a sense of humor her students probably consider “cool.” She told them the game is “for those who can handle it. And we can all handle it, right?” At their desks, students displayed a broad array of bodily positions--sitting, kneeling, crouching, hanging. They were having fun.

When they got a bit loud, she said, “OK, welcome back. *Hello!*” The second time, she began to count down, “Five, four...” but she had to go no further. When one boy made an inappropriate remark, she gestured him to the front with her finger. Using a sheet of paper to hide her lips from the rest of the class, as a pitcher hides the ball from the batter, she spoke to him softly and briefly. He returned directly to his seat and resumed proper participation. “Can we handle this?” she asked rhetorically. “We can *write out* the questions,” she reminded them. When one player began to get upset, she reminded him, “It’s only a game.” No one was surprised when she opened the candy jar for everyone as they were leaving. “Study tonight for the quiz.”

The teacher defended the use of games, noting that young adolescents experience physical and social pressures and changes that compete for their attention. She feels challenged to keep her students engaged--to keep from losing them to monotony. She is not concerned that their game, which emulates a TV show, acknowledges popular culture while the Core Knowledge curriculum emphasizes the traditional culture. The game teaches them to collaborate, she feels, and to recognize that we learn from our mistakes. She finds the 42-minute periods long enough some days, and on others the students’ attention spans make it necessary to “move onto something different.”

Extrinsic rewards are commonly employed in the 6th grade. They include: reward tickets that are drawn periodically for prizes, “Caught You Being Good” coupons, candy, notes home, free time, and computer time. In a sort of “banking system,” points are awarded for doing the right thing, such as answering, being on task, helping someone, and sharing supplies; points are taken away for forgetting supplies, telling someone to “shut up,” etc. Students solicit merchants for prizes, getting experience at writing business letters and thank-you notes and at word processing.

Two rationales given for maintaining direct instruction with its scripted presentation in middle school were that it: (a) prevents ambiguity; and (2) helps to keep the teacher from wandering so far from the “basic information” that some students would be unable to “sort it out.” Because of the many changes and pressures experienced by CKCS students entering middle school--including changing classes and having several teachers--it was considered inappropriate to simply drop DI at that level but rather to continue DI as a transition. One teacher characterized middle school DI as a “safety issue.” It was felt that the middle school students have “the best of both worlds” with both DI and other types of instruction.

Accelerated Reader, a computer program which gives multiple choice quizzes on comprehension, recall, and interpretation of the contents of widely-read books, is used in K-8 and particularly through 5th grade. Its stated purpose at CKCS is to encourage students to read and to enable teachers to have a firmer grasp of students’ comprehension of the books. It was not clear whether, as in some schools, the program is used to engender competition at any level.

Accommodating diversity. Verona is a rapidly growing suburb, in its diversity as well as in numbers. According to the principal, diversity at CKCS is a significant concern in the Verona school district. A 7-8 percent minority population in the first year at CKCS has not risen appreciably, as in other sites in the district. Slots for ethnic minorities, special education students, and “new move-ins” have remained open. CKCS has been directed to actively pursue enrollment from communities throughout the municipality. However, according to the principal, the district does not have an overall plan to balance minority enrollments districtwide. One limitation on minority enrollment at CKCS is the fact that many of the original families have stayed with the school, and siblings have the right to enroll. Another limitation is the district-wide cap on class size.

The proportion of special education students enrolled at CKCS was described as one-third to one-half of the average among schools. However, it is felt at CKCS that several students who might qualify as learning disabled or ADHD in other situations are being so well accommodated that the labels cannot be applied. “They don’t manifest the same profiles as they would in a regular setting,” according to faculty members, “because they always have to be on task.”

Teachers at CKCS are aware of the accusation that its student population is not sufficiently diverse. One teacher pointed out a homeroom that has 20% minority students, which is higher than the district’s average. Although no minority students are in the top 6th grade literature group, some minority students are in the top 6th grade math and spelling groups. The composition of the top reading group is unclear. A faculty member explained the possible absence of minorities from that group: “The way that the sequence is, [students reading at different levels] need to complete the reading series before they mix in.”

Effects of Innovative Program

Assessment plan. Mastery of the school's goals was characterized as "ongoing." Fulfillment of the first two goals, those concerned with students' cognitive growth, can be assessed by reference to students' scores on standardized tests as well as on the skill tests required by DI. In addition to the Wisconsin statewide tests in grades 3, 4, and 8, CKCS pupils take the Stanford 9 Achievement Test annually.

In addition to daily evaluation of classwork for errors, which students then correct, testing occurs frequently in DI subjects. Students' oral reading is measured with regard to fluency rate every two to five lessons, as well as error rate and kinds of errors. Mastery tests in reading are given approximately weekly. A spelling test is given approximately weekly and a math test bi-weekly. Teachers report weekly to the curriculum coordinator via an array of quantitative progress charts in each DI subject, including lessons taught each day, mastery tests and checkouts completed, names of students who did not pass a checkout or who scored below 85% on a mastery test, and students who did especially well.

Many materials used in the Core Knowledge classes in science, American history, and some literature come with their own assessments, as does Saxon Math. Teachers create their own assessments, as well.

Students' enjoyment of their learning is assessed in student opinion surveys at every grade level. The surveys ask the degree to which students agree with items such as:

1. I like what I am learning in science.
2. I feel my classes are challenging.
3. When I have a question I think it gets answered.

A faculty member suggested that student enjoyment can also be assessed by the degree of extracurricular participation, which include activities such as science fairs, international nights, math meets, and student theatre productions. Such participation is assessed subjectively, and there is not a uniform sense that students have enough opportunities for drama and other creative activities.

Assessment of students' development of values and character would appear to be informal and anecdotal. Parental involvement is assessed informally in terms of the amount and quality of assistance rendered by parents in classroom activities, school events, and school governance. An annual parent survey gauges their satisfaction, asking their opinions about: curriculum, instructional effectiveness, assessment, communication, and school climate.

Assessment findings. According to the curriculum coordinator, the goal of academic excellence and mastery of strong learning skills is being fulfilled to the highest degree. "The kids are doing very well." The goal of broad knowledge is being reached but not to the highest degree "because we run out of time.... Not enough time in the day;

not enough days of school during the year. There's still a lot more that we want to do." Considering that both Core Knowledge and state of Wisconsin curricula are taught, the level of fulfillment is felt to be very satisfactory.

Results on the various standardized tests are given by grade in the annual report. The most recent report generally shows gains, some quite impressive. However, an in-house analysis accompanying the scores is quite self-critical in areas where they are less impressive and suggests programs within the DI realm to bring about improvement.

Anecdotal reports of student achievement tend to be very positive. A teacher who has been there since the school's inception is pleased with the growth she's seen in students. Elementary students are said to be making impressive progress in spelling, and examples of excellent handwriting were observed. On the other hand, students new to CKCS at middle school level were said to have some difficulty adjusting to the choral response of DI and to the requirement that most work be done individually, rather than in cooperative groups as in other schools.

In the area of enjoyment, most students tended to give positive or highly positive evaluations on the most recent survey. The only major deviations from this pattern occurred in middle school students' evaluation of their enjoyment in two subjects. A teacher noted, however, that students who are succeeding in DI and are performing at the expected level for their grade sometimes fear they have failed, because they see that they have not gone as far as some classmates. For lifelong learning, the quantitative assessment cited was the absence of dropouts. One anecdotal indicator was that students have returned from high school very grateful for the rigors they had been put through at CKCS.

There seemed to be no indications of problematic student behavior. Behavior problems are said to be lower in the morning, when DI is the rule, as compared to the afternoon, when instruction is not quite so teacher directed. Retentions--precipitated by recurring behaviors involving disrespect, inability to follow, and insubordination--have been rare. There have been no expulsions in at least the last two years. One teacher noted that the Core Virtues curriculum seems especially helpful at recess.

Parent involvement appears to be extremely high. Parents have played a continuing, major role in school governance. Parents are counted upon to coordinate schoolwide events. Some are trained to serve as teacher aides. Some help raise funds, writing grants, for example. Faculty members have expressed their appreciation for the parental support. It seems, however, that some parents are so unusually active that some stakeholders are at times uncomfortable with their influence. In responses on the most recent annual survey, a large majority of parents tended to agree or strongly agree with positive statements about the school. The only instances in which a majority expressed dissatisfaction were as to: (a) the instructional effectiveness of one teacher; and (b) whether the attitude of their middle school child toward school improved during the year.

Charter School Influence

Much of the school's effort to disseminate information appears to be within the school district, to attract new and diverse families. Teachers note that the school is "open to classroom observations" and that they have participated in "lots and lots" of informational meetings, some at other locations in the district. Information about CKCS is also spread by word of mouth, teacher to teacher, and through newspaper articles. A faculty member characterized the annual report as a "marketable piece to show to parents...public officials...or...the school board...to show success in learning."

CKCS shares program information at meetings of DI and Core Knowledge organizations nationwide. With a dissemination grant, a pamphlet and a professional-quality video have been produced to describe the school. CKCS informs the general public of its program through its dot-com website, which provides curriculum information and the annual report, as well as links to the Core Knowledge Foundation, the Association for Direct Instruction, and other sites.

Conclusion

Apparently due to unwillingness by stakeholders of the other Verona schools to accept DI and Core Knowledge into their schools, the district chartered a separate school incorporating the two programs. The DI component appears to be fully implemented at CKCS in an orthodox manner. According to the curriculum coordinator, the Core Knowledge component is fully implemented, but the observation schedule did not permit this assertion to be confirmed. The two components appear to be mutually compatible, and both are facilitated by the scheduling of all classes in the same subject simultaneously.

Both programs are controversial in terms of their instructional effectiveness, the values at their base, and their politically charged advocacy nationwide. The school's website links not only to the Core Knowledge Foundation and the Association for Direct Instruction but to two partisan political think tanks, the Fordham Foundation and the Manhattan Institute, that endorse both programs. The nature and impact of their connection with the school was not explored. Nor did this report explore whether links to such political institutions were envisioned when the charter school program was enacted.

The potential effects of an increased minority (i.e., ethnic and special education) enrollment on CKCS are unknown. Instances of inner-city schools succeeding with DI have been publicized. The principal noted that instructional methodology could become an issue if special education personnel unfamiliar with DI were assigned to the school.

Justifying the rigorous focus on mastery of skills, a faculty member said, "We teach the skills so they can play the game." Observation of a formal Core Knowledge instructional session could not be arranged for this report, and one period of classroom observation in each of two classrooms could not verify that high-level thinking skills are prominently taught. Middle school students were said to have opportunities for higher-

level thinking, including on tests. But the literature game observed in the 6th grade class focused on vocabulary and story facts. Analysis and interpretation were missing. According to the teacher, the purpose was “to get them to focus in on the comprehension and the details when they’re reading and not just skimming over things.” In light of the emphasis on speed and the counting of errors in the CKCS assessment system, the adequacy of opportunities for students to deal with higher-level questions deserves further exploration.

Similarly, the Accelerated Reader software emphasizes factual recall in terms of correct and incorrect responses. Its stated function at CKCS is to encourage students to read and to enable teachers to have a firmer grasp of students’ comprehension of the books. Whether Accelerated Reader is supplemented by interpretive discussions was not clear.

Much of the curriculum coordinator’s duty is to monitor students’ growth via their test scores. An additional half-time curriculum coordinator has been added for next year. Given the rigorous quantitative assessment integral to DI, it does not seem unreasonable to expect teachers and/or students to develop a pattern of considering scores more important than knowledge, skill, or enjoyment of learning. It would seem important to document how such patterns are avoided. It would also seem important to explore the extent to which assessment may broaden, narrow, or otherwise modify: (a) the curriculum; and (b) participants’ definition of growth or progress at CKCS or at DI schools as a group.

Students appeared well-engaged in their activities. Their questions seemed to get answered. Asked whether students could tire of the choral response routine, a faculty member replied, “It’s a really engaging form of learning. And if they tire of that, I can’t imagine what they would do in another setting, where they’re not engaged in the learning process.” This statement seems to assume that engagement requires continual oral or written responses. The concept that mental or emotional engagement can occur when other modalities or “intelligences” are employed--dramatic, artistic, physical, or interpersonal, inductive or intuitive--is not part of DI theory. Tracking appears to be avoided by the stated practice of changing instructional groupings a number of times a year, especially at the lower levels. It is unclear whether the historic problem of higher-level classes being less accessible to minority students has been encountered at CKCS.

As evidence that students are getting a "sense of achievement," one faculty member explained that they are constantly being tested, and when they are not, the teacher is checking their work and giving them feedback. However, an unspoken need to keep up with high-achieving peers has led some reasonably successful CKCS elementary students to fear that they have failed. Here, the consistency of the school’s goals may come into question. It is unclear whether pursuit of strong learning skills and academic excellence, especially in the lower grades, as carried out at CKCS, is consistent with the goal of enjoyment of school or development of lifelong learning interests. The constant feedback can foster intrinsic motivation, unless it is experienced as pressure to perform.

More than a marketing device, the annual report is a viable way of disseminating usable analytical information about the success of methods for a whole school and for its sub-populations. CKCS's report is commendable for including not only comparative test scores but analyses of their trends and recommendations for improving weaker areas. The annual report is also commendable for its unique surveys of parent and student opinion. While there is not a formal process by which the faculty examines the survey results and replies to the parents, such a process is envisioned by the principal. Currently, The principal acts as intermediary for concerns that come to light through the survey.

CKCS's video and brochures (as well as the annual report) are attractive, informative pieces. How widely they have been disseminated was not determined in this investigation. However, the CKCS dot-com website is a powerful medium for dissemination which obviously goes across the nation and beyond.

Two types of dissemination CKCS has attempted do not necessarily further the state's intention of spreading innovations to public schools. One is dissemination within the school district, to attract new and diverse families. The other is dissemination at meetings of DI and Core Knowledge organizations, where it is unclear whether the information reaches or benefits schools that do not already use these methods. Further, if diverse public schools attend these meetings, it is unclear whether: (a) adoption of successful pieces of the two methodologies is encouraged; or, in contrast, (b) the rhetoric tends to be ideological to the extent that anything short of adoption of the programs as a whole is discouraged.

CKCS teachers seem to be highly committed to the school's program and satisfied with its results. (They responded in great detail to the questionnaire for this report.) They generally agree with the DI and Core Knowledge curricula and feel they have sufficient instructional autonomy in both. Teachers have been satisfied with the number and quality of staff development opportunities, including conferences sponsored by the national DI and Core Knowledge organizations. Their satisfaction has been tarnished by the political pressures they felt during the time when the renewal of the charter school contract was before the school board. "The administration does not...believe in our program," said one teacher. Teachers' level of comfort has also been affected by the moves from one building to another, making it "hard to figure out where you belonged."

Assessment at CKCS has been characterized as "a lot of very close monitoring." Monitoring of students involves, in turn, monitoring of teachers. Teachers at CKCS willingly accede to such scrutiny, turning in sheets of their pupils' DI scores and their Core Knowledge topic checklists to the curriculum coordinator every week. Parents, through the annual parent survey, have a unique opportunity to critique teachers' performance. When parents express less than full satisfaction, the extent to which teachers' positions might be vulnerable is not clear. (The teachers' contract was not examined.)

This charter school appears to fulfill a strong desire in the community for high academic standards and consistency of curriculum. Hence, the charter law enables

parents who believe in the program to have it while parents who disagree with it can place their children elsewhere. The program is extremely well documented, both as a general plan for schools and as to its implementation and results at CKCS. CKCS appears to be assiduously carrying out its original plan. The staff is experienced, well trained, and committed. Lack of diversity has not been overcome but is being addressed. Parents and students are generally very satisfied. There is considerable evidence that CKCS is accomplishing most of its goals.

Paideia Academy

Background

Paideia Academy is located in the city of Kenosha. It is an instrumentality of the Kenosha Unified School District (KUSD). Paideia Academy rents space on two floors in a building that formerly was a parochial school. The school enrollment is limited by its contract with KUSD to a maximum of 75 students total and no more than 25 students per grade. Paideia Academy began serving students in grades 7 and 8 in 1997 and added grade 6 during their second year. A proposal to establish Paideia Academy was approved by the KUSD School Board in May 1997, and the school began operating in August of 1997. The most recent contract between Paideia Academy and KUSD commenced in July 1999 and extends for five years.

Students who wish to attend Paideia Academy must apply. Originally students were accepted on a first-come, first-served basis. Now, according to one of the teacher/directors, all applicants are part of a lottery for selecting the students. As stated in both the Paideia Academy Proposal from 1997 and the current contract, the application requires “a statement regarding learning goals and commitment to the academy, positive qualities, and how the positive qualities will help the school. Students will be asked to explain why they want to be part of a learning team.” Similarly, a written parental statement is part of the application process. “Parents...will explain why they would like their child to attend Paideia, indicate the strengths of their child both academically and non-academically, and describe the special needs of their child.” Nevertheless, the contract states that there are no special requirements for admission “with the exception that students will specify in a written contract...that the student is committed to the educational program standards of Paideia and agrees to meet attendance and non-tardy standards.” Parents also sign an agreement “pledging adherence to the standards and requirements of the academy.” According to the Proposal, parents are also expected to donate time to help with such things as field trips.

The school has a staff of three full-time teachers, two of whom also serve as co-directors. The Paideia philosophy sees the administrator of a school as a lead teacher. There is one part time teacher, as well. The teachers are employed by KUSD. The full-time teachers have Wisconsin licenses. The license and degree status of those teachers is summarized in Table 4. Paideia Academy contracts out for physical education, French (one day per week), and guidance services (one day per week). Other classes, such as music, may be taught by volunteers as part of a school activity rather than part of the formal curriculum. Students may also participate in activities such as orchestra or athletics at their “home” school, the school each one would normally attend. If the participation is part of the curriculum at the home school, the student will receive a grade which will then be given to Paideia Academy and considered in the student’s evaluation.

Table 4
Degrees and Wisconsin Licenses Held by Teaching Staff at Paideia Academy

Type of License	Number of Teachers
Regular license; teaching in area and grade level of license	3
Regular license; expired or teaching out of area or level	0
Charter license (in addition to regular license)	0
Charter permit	0
Unlicensed	0
<u>Degrees Attained</u>	
Bachelors - Masters - Doctoral	1 - 2 - 0
Total Teaching Staff	3

Source: Licensure information provided by DPI as of June 4, 2001.

Note: Figures include teachers that are full-time in Paideia Academy building, including both co-directors.

Intended Innovative Program

As stated in the proposal and contract, Paideia Academy employs the Paideia Program of Instruction based on the work of Mortimer Adler. For further explanation for the basis the co-director referred to the information that can be found on the website of the National Paideia Center. Information from the site explains that Paideia thought is built on the understanding that a student's education should accomplish three things: 1) preparation to earn a living; 2) preparation for citizenship; and 3) preparation for self-development. Three types of teaching are part of the Paideia Program: (1) didactic teaching of the subject matter; (2) coaching, that will result in the development of the skills of learning; and (3) Socratic questioning, that takes place in a seminar discussion format. The program is not intended to be prescriptive in regard to curriculum content; rather, specific content is determined by the specific educators involved, as they are seen as the main change agents in education.

The school's contract with KUSD reflects the Paideia Program of Instruction. It states that the "goal is to provide a rigorous, liberal arts education, and teach the skills of lifelong learning, successful employment, and responsible citizenship." The contract also reflects the local development of the specifics of the curriculum, which is based on the Content Standards set by KUSD. The curriculum expands the liberal arts to include technology and multi-media resources as part of the instructional program. The contract recognizes that the "ability to adapt curriculum materials that enhance and match the Paideia program will be available."

The goals of the Paideia Program in KUSD, as expressed by the faculty, are that each child receives the best education through the means of didactic teaching, coaching,

and Socratic seminars. According to the contract, the educational program is to emphasize mathematical skills, complex thinking, reasoning skills, writing, communication, and reading and analyzing literature. As one co-director wrote, the goals are to “provide an environment which fosters a positive self image, cooperative team concept, . . . develop a learner who sets goals and fosters a desire to be a life-long learner, recognizing learning takes place not only within the school but throughout one's life. . . .” The program is also intended to provide an environment in which students recognize their responsibility for their own learning and for successful teamwork.

Implemented Innovative Program

Observations were made in Team (which is like homeroom), a 7th-grade English class, an 8th-grade math class, a 6th-grade science class, an 8th-grade social studies class, and an after-school chorus class/activity. No seminars were scheduled for the day.

The Team is a fifteen minute session used for attendance purposes, announcements, and taking lunch orders. (A hot lunch from a set menu is brought in each day. There is no selection.) Most of the time in Team is spent in informal conversation between students and the teacher and among students themselves. One announcement concerned an upcoming meeting of the math team. Another was about the assignments for cleaning the building. This is a unique aspect of the program. Students, on a daily scheduled basis, are assigned to clean the building, except for the rest rooms. This cleaning is a way of attaining the goal of responsibility and teamwork. At the end of the day, students were observed emptying baskets, cleaning writing boards, vacuuming classrooms, etc.

Each student has a “day book,” called the “Paideian Personal Daily Planner” which is provided by the school. The planner allows the student to keep track of assignments in each basic subject area. There is also a space for the student to write goals and notes and a space for parent or teacher signatures. At the back of the book are pages with information relating to the four basic subject areas. Included are: a map of the world and of North America; common rules of spelling, punctuation, grammar, as well as a pronunciation key; conversion tables for fractions to decimals and Fahrenheit to centigrade, multiplication table; and a chart to show how to add, subtract, multiply and divide fractions; geometric formulas; and the periodic table of the elements. The front of the book is a student handbook that describes the school day, discipline policy, homework policy, and dress code. There is also a copy of the student and parent contract.

The English class, taught by one of the co-directors, demonstrated the didactic aspect of the teaching strategies. The class was teacher-centered. All students were engaged in the same activity and students responded on cue from the teacher. The teacher used an overhead projector to show an incorrect English sentence to the students, who were to rewrite it, correcting errors in capitalization, word usage, and punctuation. The sentence contained examples of figurative language. The teacher made a comparison to Chinese symbols, which are used to convey meaning. She showed some symbols and asked students to interpret them. She then reviewed previous vocabulary with students

and instructed them that they may use their notes. The students, when called upon, defined and gave examples of the words. The vocabulary words were terms for figurative language (simile, metaphor, symbolism, hyperbole, etc.) The students were then asked for their corrections to the original sentence.

The teacher again used the overhead to explain, define, and give an example of other figurative language to the students. The students all took notes. Their assignment was to use stories they had started the previous day, based on something that they had done in art class dealing with dinosaurs. They were to create an environment for their story and the story had to teach a lesson. In their writing they were to include an example of onomatopoeia, and use three to five alliterative words to describe the dinosaur. The students were then asked to take out a poem and directed to convert something in it to a simile and underline the figurative language. They were then told to take out their book dealing with critical reading and writing and to circle the words that signify time and place. The teacher went from student to student to check on what they were doing.

The class then shifted gear entirely to view a video produced by Allstate on fire prevention safety. Some students had apparently seen it before. Students were assigned, to draw a grid for an escape from their homes, including two ways to get out. At the end of class students were reminded of the due date for their grid and journal. Suggested journal topics were their escape plan, what they were doing in art club, and cooking.

Throughout the class the teacher consistently reiterated what it was they were learning and how it met the KUSD content standards. There were no significant discipline problems. Occasionally the teacher would refer to a student by name as a means of exercising control, and one student was threatened with a detention after the third time she had called attention to herself.

The math class, taught by the other co-director, was similar in operation in many respects to the English class. The teacher first went over the answers to the homework. She then presented orally a series of chain operation problems (e.g., $250/5 \times 3 + 25/7 =$) that students were to write the answers to. This was apparently a daily routine. The students corrected their own papers and the teacher recorded the grades. According to the teacher students correct their own work so that they can ask questions about what they did. Three students who were ahead of the rest of the class were then excused to go to another room to work together and independently on higher math exercises. The teacher then worked separately with them. According to the teacher, this practice is consistent with the idea that students are to become independent learners.

The class then went over the homework. Again, students corrected their own papers. The teachers solicited volunteers to put work on the board. There was no shortage of volunteers. This board work seems to be a common, non-threatening part of the class routine. The class was working with similarities, proportions, and ratios. It seemed difficult for the students, as though not many could understand or apply the concepts. At one point she responded to a student answer to an estimating problem, "Good educated guess, but we're not going to use it." She then determined that the

students needed rulers and calculators to help them get the correct answer, so these two items were passed out. In another problem, she drew a picture on the board as a scale drawing and wanted the students to find the area and perimeter. She cued the class by saying she wanted them to verbalize, " $1/16 = 1\text{ ft.}$ " She asked if it was clearer, and the students answered "Yes", but she had no system for monitoring if that was true.

At the conclusion she announced that the class would now have an assessment, meaning test. Students were allowed to use their book, and she encouraged them to draw pictures of the problems they were trying to solve. With ten minutes left, the students finished the test and wandered around the room. For the last five minutes of class, the teacher gave oral questions from a trivia book and students shouted out answers.

Lunch followed. Immediately after lunch, the entire student body was taken on the school's daily walk through the neighborhood.

The 6th grade science class began with sustained silent reading. The teacher then distributed a newspaper article relating to patient care in doctors' offices. This exercise was intended to link science with practices and issues in the broader world. As the teacher sat at the back of the room, a student led the class. Using individual cards with each student's name, the student called on others to read aloud. Some students read well and others did not.

Upon finishing the reading they were instructed to answer five questions on the back of the article. This was a timed activity. The answers were all facts from the article, except for one question which asked the student to extrapolate from the information what negatives might occur from the system of patient care explained in the article. Answers were to be three to five sentences in length. Students then read their answers. Clearly, this kind of activity occurs often and coincides with what the teacher wrote in her response to the questionnaire: "Daily science presentations by students. Students present current science articles daily to students. They address various topics at the higher level thinking levels such as synthesis and evaluation."

A review sheet was distributed for an upcoming test on heat, fusion, and vaporization. The teacher asked a question and called a student to put the problem and answer on the board. It seemed that not all the students were clear about what they were doing. This part of the review lasted about 10 minutes. Next, came a worksheet with problems requiring application of the skills already learned, as well concepts to solve a problem. Students worked in groups, which received points for a student's response. There was quite a bit of talking among the students as the teacher spoke, and there was some disagreement among the students about which answers were correct and why. The teacher often told which was the correct or most correct answer. At times she affirmed or reinforced an answer, but not often. There seemed no way at this point to know who knew what. The activity lasted about 25 minutes. Then, the teacher put problems on the board in what seemed to be openly teaching to the test.

The teacher divided the class into teams to go over the vocabulary for the test. In an exercise much like the game “hangman” she put a clue for the word on the board. The first team to get it correct would get points. Within the groups there was considerable arguing about who was to be the captain (spokesperson) for the group. There was some attempt to let the groups resolve the issue, but ultimately the teacher had to arbitrate and decide. This activity lasted about 10 minutes until the conclusion of the class. The activity seemed to be aimed at cooperative learning and coaching. The teacher wrote, “In cooperative learning groups, the higher ability students are paired with our learning disabled students. The success all of our students’ experience very much affects their self-esteem and performance in a positive manner.”

The same co-director who teaches math also teaches 8th grade social studies. This class was short, as they would soon disband to work on a video that they were preparing on the Revolutionary War or to go to the computer room. The class began with a quiz on map work. The students worked independently, locating places on the map based on a written description. For example, one of the questions was, “Which continent has the smallest border on the Atlantic Ocean?” The students graded themselves.

Following the quiz, the teacher went over an exercise the students did identifying information about the Revolutionary War and whether it was written in sentences. Students had a difficult time pronouncing some words correctly, such as “continental” and “Ticonderoga.” Before dismissing the students, she admonished them to find out when the war started for the essay they would have to write. In the computer room, students worked on their investments for the stock market game.

An after school activity, chorus, was observed in one of the classrooms. Students select this activity which is conducted by a volunteer parent. It does not meet every day. About eight students attended. The parent brought her own small keyboard. They worked on a short medley of American folk music dealing with the 19th century.

There are other aspects of the implemented program that are signatures of the school and are part of the curriculum. These are in the category of extending, involving, and giving back to the community. For example, student projects are shared with the community. As the director wrote, “Projects are shared with the community. Student projects are created and displayed. [They are] presented to other schools. Students present books, stories and visual displays to elementary schools. We travel there and give presentations.” On the day of observation, shadow boxes dealing with John Steinbeck's *The Pearl* were being prepared to take to an elementary school. The shadow boxes, as with all student projects, had to meet certain criteria--for example, the number of moving parts--in order to achieve a certain grade.

One activity had high school students evaluating the required end-of-the-year projects of the 8th grade students. As a co-director wrote, “Students need to develop an awareness their work has value to others; their work has an impact on the community; and peer evaluation is a helpful way to improve.” Another example of extension into the community is “Job Shadow Day.” Every student spends a half day at a job site in the

community. According to one co-director, “Students return and share what they gained discussing how learning content compliments job requirements.” Students also do volunteer service in the community. For example, they work at a soup kitchen, they adopt a family for Christmas, and they organize and run a “foodathon” to collect food for the Spanish Center each Valentine's Day. As one teacher wrote, “Our students volunteer at the homeless center. They are functioning as responsible students and responsible citizens and behave responsibly. They are prepared for the real world. They respect the diversity of class and cultures.”

Effects of the Innovative Program

By contract, Paideia Academy is required to include the “Wisconsin Educational Goals and Expectations” as part of the basic curriculum content. The school uses the Iowa Test of Basic Skills and the WKCE, the same tests used in the other schools of KUSD, to monitor student achievement. Each year KUSD sets goals in the areas of attendance and academics for each school. It was not clear how these goals are set, but over time the goals in virtually all areas are increased. For example, the average attendance goal set by KUSD for 1997-98 was 92.55% and for 2000-01 it is 93.51%. In 1999-2000, Paideia Academy exceeded the KUSD expectations in 78% of the goals. When asked what happens when a goal is not met, the director stated she did not know. In 1999-2000, 100% of the 7th grade students were above the national average in their math score. When the director inquired what would happen if that number went down, she was told not to worry, that the district looked at three years of performance in assessing whether goals were being met. There is, however, no such formal policy or documentation of this practice.

At the school level there are a variety of assessment strategies. By contract, a portfolio of each student's work is maintained throughout the student's attendance at Paideia Academy. Included in the portfolio are “projects, video taping of oral presentations, personal goal setting, and student achievement based on the growth of the learner.” Additionally, a report card with a grade for each subject is issued each semester.

Paideia has established a “Paideia Academy Scholar Program” which is detailed in the “Paideian Personal Daily Planner.” Students earn points for awards in four areas: citizenship, attendance, wellness, and grades. A total of 5000 points is needed to earn a letter, which is paid for by the school. A total of 4300 points is needed to earn a sweatshirt. (The student has to buy the sweatshirt but the school pays for the ornamentation.) Students, for example, earn one point for each half hour of community service. A medal is awarded if they accumulate 144 points. In the area of attendance, students earn a point for each half day present and receive a medal if they accumulate 340 points. Similarly students earn one point for each half hour of “wellness” and earn a medal if they accumulate 360 points. In the area of grades, students earn 1200 points and gold graduation numerals for a 4.0 average, 1100 points and a chevron for an average of 3.6-3.9, 1000 points and a star for an average of 3.1-3.5, and 900 points for an average of 2.0-3.0. Students receive point tallies each quarter so they can monitor their progress.

Each student maintains a portfolio for all three years for each class: math, science, social studies, language arts, and art. The contents of the portfolio are examples of the work the student has done, as well as the goals he/she has set. Parent conferences are held four times a year and are led by the student, who reviews the contents of the portfolio, justifies the grade, and reviews the goals with the parents. This is also the time to show which KUSD content standards were covered. As the co-director wrote, “students are able to articulate their accomplishments. Parents are part of setting student/child goals.

One of the unique aspects of classroom assessment at Paideia Academy is the use of student-generated test questions. In response to the question about how the charter is assessing whether charter goals are being met in the classroom, the science teacher wrote:

Test performance is based on student generated test questions. It is proven that students perform better at questions they have designed themselves. Other assessment strategies used are observation, . . . research papers, cooperative group processing, video assessments, and teacher made tests.

The social studies/math teacher wrote, “Assessments are used according to standards. They include real life applications, presentations and research. Assessments, daily work, warmups, vocabulary tests and group work.”

As a culminating assessment, each 8th grader prepares a “thesis.” This thesis involves identifying and researching a “hero.” The student must prepare a presentation board that incorporates math, science, social studies, art, and audiovisual skill. The presentation board is presented to parents and staff and evaluated by the staff. The evaluation becomes part of the quarter’s grade. Each student begins by completing a “Topic Focus Sheet” on which the student states the topic, reason for selection, and questions to be researched. To provide focus, the sheet defines a hero or heroine as:

“any person who leaves their level of comfort and safe life setting to go on a quest. The person may choose to do this or be forced. The person takes the quest and changes in a positive way. The person as a result of the quest brings back or gives to others a better chance and way of life.”

At the conclusion of the project, the student completes a “Reflection Of Final Project” form on which he/she states such things as what the goal was, what the student wanted the audience to learn, what the student is proud of, what the student would have done differently, what the student has learned, etc.

Charter school influence. Paideia Academy does not have a formal method expressly designed to share its program with others. According to a co-director, the school is a member of the National Paideia Center, and staff members attend an annual conference of the Center. This conference provides a means of networking and sharing, but not in the sense of promoting the expansion of the program into other KUSD or

surrounding schools. The co-director did say that there are occasional calls from other schools and districts inquiring about the program. On the teacher questionnaire, one teacher wrote that "information to the community" is the area in need of most improvement. Another wrote in response to the same question, "Our school needs to get more involved with publicity about its positive success rates and testing scores."

Conclusion

Students apply to attend Paideia Academy. They are admitted contingent upon their commitment to the goals and requirements of the school and their parents' concurrence with adherence to the requirements of the school. Failure to comply is a reason for dismissal. Although, according to a co-director, this is not an issue or a problem, the sanction could be invoked if the situation warranted. New students are admitted almost exclusively at the sixth grade. There are two reasons for doing so. First, because of the school's small size, there generally is not room in the 7th and 8th grade; second, there is a strong feeling that since Paideia Academy is a three year program, students who enter in the middle will have a difficult time succeeding.

The documents, interview responses, and site visitation confirm that Paideia Academy is focused on its mission. Evidence exists that the school has built into its program the aspects of the three major tenets of the Paideia Program: (1) preparation to earn a living--through shadowing, for example; (2) preparation for citizenship--through such things as working at a food pantry; and (3) preparation for self-development--through such things as the 8th grade hero project. Similarly, there is evidence that the pedagogical attributes of the Paideia Program are practiced in the school. The English lesson on figurative language demonstrated the commitment to the didactic approach, and this kind of teaching was observed, to greater or lesser degrees, in all the other classes observed. Time in both the math class and the science class was spent employing the elements of coaching, both by the teacher and among the students. Although no seminars were observed, an explanation of the seminar topics and how they are developed and used indicated a clear connection to the rest of the educational program. It was not clear, however, how it is determined that what is taught is learned as intended. In a number of instances there were indications that students did not understand what was being presented.

Paideia Academy, while developing its own curriculum, is held to the content standards of KUSD. Although the curriculum is not designed to teach to those standards per se, the teachers do make it a point to indicate to the students what it is in their lessons that addresses those standards. The teachers seem to have been able to blend the Paideia Program approach with the KUSD curriculum standards very well. In terms of achieving the outcomes required by the district and meeting the goals set for the school by the district, Paideia Academy and the students seem to have succeeded.

Overall, Paideia Academy appears to have put together an effective program to serve the needs of its students. In blending the Paideia Program with the KUSD Content Standards, the school has employed effective means--such as the final hero project and

the book project for *The Pearl*--for students to use the knowledge they gain in creative ways that not only benefit themselves but the community, as well. The school has designed means to supplement and complement its program by making use of the students' home schools for special courses and activities and by using part-time instructors, as with foreign language, and volunteer instructors, as with the chorus. It has made efforts, with the daily walk, to acquaint and sensitize students to the scope and nature of their immediate environment.

Although the contract allows the charter school to carry over unused funds, Paideia Academy received notice from KUSD that due to a change in procedure they would not be allowed to do so. The directors were concerned that they might not get the funds and that they would have to use some of their funds to hire counsel to protect their contractual rights. How this matter would be resolved was not known at the time of this visit.

Paideia Academy's accomplishments and unique characteristics notwithstanding, whether the school needs a charter to function is problematic. Charter schools' broader discretion in hiring staff has not been an issue, as the full-time teachers all hold regular DPI certification appropriate to what they teach. Each staff member interviewed was asked what benefits accrued to Paideia Academy as a charter school and whether those benefits required charter status in order to be attained. The two items cited as being significant were: (a) the freedom to do what they wanted; and (b) the benefits they derived from the grant monies made available to charter schools. They agreed that KUSD probably could grant the freedom without the charter but would be unlikely to do so. They also agreed that without the grant money they would not have been able to purchase equipment and other necessities to start the school.

Highland Community School

Background

Highland Community School is a Montessori school, situated in a mostly African American section of Milwaukee. Begun as a private Montessori school in 1968, Highland was housed for many years in a mansion that had formerly belonged to the family of a beer baron. Before becoming a charter school in 1996, Highland moved several blocks to its current site that includes a three-story mansion formerly owned by another of the beer barons, a more modern one-story classroom wing connected to the mansion, a two-story coach house converted to classrooms and offices, a parking area, and a small playground.

Montessori schools are based on the philosophy and methodology developed by Maria Montessori as she strove to provide meaningful care for impoverished young children in Rome, Italy, in the early 20th century. One of Montessori's essential principles is the "prepared environment," in which children are given ready access to materials that are carefully designed to satisfy developmental needs and demonstrate sensory distinctions. Although Montessori's writings are best known in connection with children six years old and younger, she recognized different developmental stages and needs as children mature, and she designed educative environments for children through adolescence. Her philosophy embraces the pursuit of peace, and her methods reflect that pursuit. The most widely accepted Montessori teacher training programs teach the methodology in detail and require internship experiences in Montessori classrooms.

Highland currently houses two primary (age 3-5) classes, one elementary (age 6-9) class, and a toddler (age 1½-3) class. The primary classes meet in the morning only, although many of the children continue their Montessori experience in a four-year-old "enrichment" program and a five-year-old "extended day" program in the afternoon. One hundred children are currently enrolled: 69 African American, 21 white, and 10 of other ethnicities. Six students receive special education assistance, including one who is considered learning disabled and five who receive speech therapy.

As a private school, Highland participated for several years in the Milwaukee Parental Choice Program, by which qualifying low-income families received tuition vouchers from the state of Wisconsin to pay for their children to attend. When Highland's parent body decided that the school should expand, they considered becoming a "partnership" school with Milwaukee Public Schools (MPS). But the parents determined that that status would not ensure stability of funding for it to expand in size. Their aim has been to add classes at the current grade levels, approximately doubling the enrollment. It was MPS that approached Highland to apply for charter status.

Highland presently receives about two-thirds of its funding from private sources. Ironically, once it began to receive charter funding, private sources began to dry up because of the assumption that there was less need for them. According to Highland's principal, the funding from MPS has been insufficient to allow Highland to expand in the

near future or to pay off its debts and mortgages. At the time of the interview for this report, the school was said to have a \$300,000 deficit for the year. Because the inclusion of three- and four-year-olds is essential to Montessori education, and funding for that age group is uncommon in the district, the parameters of funding for Highland has been a topic of recent MPS board deliberations. Under state statute, the toddler program cannot be part of the charter school or its funding. The status of the afternoon primary programs with respect to charter and funding was not clear or stable at the time of this interview. Still, Highland plans to keep its charter status. The main reason, according to the principal, is that:

charter is not just [for] our own self-interest [so] that our budget balances. Charter for us is a public policy issue that our whole organization has been a part of for a long time....We have an obligation to be on the cutting edge, to be a voice, to be a model.

Highland has long been closely affiliated with the Association Montessori Internationale (AMI) training program in Milwaukee. Over the years, many of Highland's teachers have come from the ranks of the school's parents, who eventually received Montessori training. One current teacher, for example, who had been a school parent and later spent a number of years as an aide recently completed AMI certification. In turn, many of the teachers in the MPS non-charter Montessori schools began their Montessori careers at Highland.

Each primary class has two teachers and an aide. The elementary class has one teacher and an aide. The toddler class has one teacher and an aide. Although only the elementary teacher and one primary teacher hold a Wisconsin teaching license for their age groups, all five teachers possess Montessori certification. The aides are neither licensed nor Montessori certified. The license status of Highland's teachers is summarized in Table 5.

Because Highland was a private school when it applied for charter status, the state charter statute required that it could only become part of a school district--in this case, MPS--as a non-instrumentality of the district. As a non-instrumentality school, not only does Highland have the right to select its teachers from outside the district's pool but to pay them without regard to the MPS union scale. Salaries are negotiated with individual teachers but apparently do not vary much across the faculty. The principal stated that pay is within a few percent of union salaries and that benefits are not so good as those received by union teachers. He said that because Highland comes from a liberal political tradition of activism and union organizing, there is an openness to the possibility of the teachers negotiating salaries and benefits as a group.

Table 5
Degrees and Wisconsin licenses Held by Teaching Staff at Highland Community School

Type of License	Number of Teachers
Regular license; teaching in area and grade level of license	2
Regular license; expired or teaching out of area or level	0
Charter license (in addition to regular license)	0
Charter permit	0
Unlicensed	4
<u>Degrees Attained</u>	
Bachelors - Masters - Doctoral	4 - 1 - 0
Montessori certificate	6
Total Teaching Staff	6

Source: Licensure information provided by DPI as of April 3, 2001. Information on degrees and permit applications provided by principal. Total teaching staff derived from both sources.

Note: Figures include program implementor. They do not include instructional aides. Three staff members have applied for charter permit.

Intended Innovative Program

Highland Community School has four stated goals:

1. To provide Montessori education and a nurturing environment for an economically and culturally diverse group of families on Milwaukee's west side.
2. To empower parents to become responsible for and involved in their children's education.
3. To improve the community by educating parents, promoting racial harmony, emphasizing respect on all levels, and introducing children to their roles in the community.
4. To develop capability and responsibility in the use of computers.

The first three goals are interrelated aspects of the school's historical relationship to its children, their families, and their community. The fourth does not appear to have been integral to that relationship in the past or at present but may anticipate its nature in the future.

One element of autonomy enjoyed by the school is the ability to hire teachers from outside the pool of MPS teachers. Highland can choose teachers with Montessori training and give preference to persons who have been affiliated with the school, such as former Highland parents. A second element is the freedom to limit enrollment to

students residing in the geographic area the school has chosen to serve. A third element is the freedom to enroll only those children whose parents seem willing to work for the school, their children, and the community for a minimum of 36 hours per year. In the words of one faculty member, “We don’t interview children; we interview parents.”

Implemented Innovative Program

Observations were made at Highland in a primary classroom and an elementary classroom. The primary classroom is pleasantly bright. Finely crafted Montessori instructional materials of wood and metal are neatly arranged on low shelves. Child-size tables and chairs are placed throughout the room. An open area at one end is carpeted for group gatherings. Plants are set at various places. Two pet doves peer from their cage. Ambient music spreads softly from a CD player.

On the day of observation, about 20 children (about two-thirds of the class enrollment) were present in the primary classroom. One young boy initiated a handshake with the observer. While several children snacked together on juice and crackers, others were engaged individually or together at work they had selected from the shelves. On the shelves, beside language and math materials, there are “practical life” materials that are meant to develop children’s “sense of order” and “sensorial” materials to validate their sensory discriminations. Most children were carrying out lessons that had previously been demonstrated to them. Some children gently tested the elegant materials by tapping or spinning them. For a child who was painting with water colors, the activity deliberately included carefully pouring off the used water and refilling the cup. He commented that the water in the bucket will change color when he pours his into it. Two children worked on a large drawing of a snake. It was apparently a “research” topic of theirs. Research, for children too young to be reading meaningful non-fiction, involves parents reading aloud from books on topics of interest.

The primary program was easily recognizable as Montessori by the orthodoxy of the materials, the activities engaging individual children, and the measured pace and tone of the teachers as they modeled the use of the materials. One teacher formally demonstrated Montessori language and math activities to individuals, involving them in the demonstrations, taking perhaps five minutes with each. At opportune moments during and between presentations, she answered other individuals who were checking with her as part of the activities they had selected from the shelves. A five-year-old read simple commands (e.g., “Hold a cube.”) on laminated paper strips and showed this teacher how he was carrying them out. Meanwhile, a three-year-old tried to get the older child’s attention. What he probably got instead was an object lesson in focusing on one’s work, as the older one ignored him and continued.

The other teacher had a somewhat different role, taking more than fifteen minutes to introduce an activity to a young girl. This teacher focused solely on demonstrating the material to that child, and the other children seemed to understand that this teacher was not to be approached at this time. The teacher explained her demonstration:

For the initial presentation--and I don't expect the child to do it perfectly, have [the red rods] lined up according to length--but just having a general, good understanding of how we bring the rods to the rug, how we set them at the lower quadrant of the rug so there's enough space for working, and showing them the very deliberate movements, allowing some time for them to take their hand and rub the rod from the top of the rod to the end of the rod, and just getting that concept of the length in their muscular memory, and then giving them the chance to repeat it.

In contrast to the teachers, the aide moved about the room. She noticed children's use of materials and their social interactions. Twice at the snack table she intervened when conflict occurred. She spoke assertively but softly, trying to resolve the problem. In one instance, she gently ushered a disputant away from a situation.

The elementary class consists of about 25 students, age six through nine. Nearly all were present. Their custom is to call their teacher by her first name. The classroom, which takes up two rooms of the house, feels rather crowded with furniture, materials, and students. The shelves are accessible and full of traditional Montessori materials for older children. Tropical fish, a guinea pig, a turtle, and a finch are taken care of and observed by the students. Although certain activities are to be performed individually, there are evidently many opportunities for pupils to collaborate, as is common in elementary Montessori classes. For example, a boy and girl had placed a small rug on the hardwood floor and worked together, forming shapes out of wooden cubes and making notations on graph paper. When their focus seemed to be flagging, the teacher suggested that they see how many different ways they could arrange eight cubes, and they proceeded eagerly. A common example of collaboration described by the teacher is a student helping a less skilled classmate to edit her report.

Math activities from the shelves are supplemented by small group lessons. A group of eight students kneeled on a rug at a semi-circular table about two feet tall that is also used for science demonstrations. As the teacher defined and illustrated geometric terms--parallel, divergent, etc.--they copied the terms and illustrations into stapled-sheet booklets. Some students did not appear to be grasping the concepts at this juncture. (Possible further opportunities to understand them were not discussed.) On several occasions, the teacher looked past the group to suggest steps to pupils doing other academic tasks. She noted that with the conceptual aid of Montessori math materials, such as cubes that assemble and disassemble to demonstrate binomial and trinomial equations, the class has been enthusiastically squaring numbers and was beginning to calculate the cubes of numbers.

Reading is taught by direct instruction with materials published by SRA. The teacher chose this method with the intent of overcoming the reading difficulty of one child characterized as "ADHD" while at the same time helping all the students. After looking into several methods, she decided direct instruction would be best and took a course in it. Materials were then purchased by the school.

A group activity for about 12 students, led by the teacher at the semi-circular table, followed the procedures of direct instruction. The group's attention was not attracted by her rhythmic claps at first. Only when the clapped pattern became complex did the students seem to consider them worthy of echoing. With everyone's eyes on the book she held in front of them, she pointed to the first group of letters: "Get ready. Together!" In unison they said the sound "ay." In a split-second she said, "Yes, ay." Then she moved her finger to the next group of letters and the process continued. Individual words were recited in a similar fashion. She pointed to "rabbit." She told them to say each of its component sounds first, then to put the sounds together--slowly first, and then rapidly. "Yes, rabbit," she confirmed. "A rabbit hopped through my garden." To one boy whose response anticipated the others, she cautioned, "You need to wait until I say 'together.'" There was a noticeable amount of extraneous bodily movement--squirming, etc.--amongst the participants, but they appeared to be quite focused. They would have an opportunity for large motor movement later that day at their weekly swim session at a local indoor pool.

Later, the teacher read a story to the whole class as they sat casually around the rug, some continuing to do their own reading or writing. Materials for geography and other social studies activities were present, but activities were not observed. In science, she was preparing a demonstration on evaporation and condensation using a hotplate. The degree of implementation of social studies and science is unclear. However, the students' "record sheets" contain spaces where completion of many specific activities in these areas can be indicated.

The record sheets, kept by the teacher, categorize and list the activities that a nine-year-old child is required to complete by the end of 3rd grade. The sheets include topics characteristic of the Montessori curriculum in all subjects. To mark off activities on the record sheets, the teacher often refers to the contents of each child's portfolio, or "work accomplished folder." Rather than receiving grades, students are required to go back and improve a piece of work until it has been done, in the teacher's judgment, to the best of their ability.

Ongoing formative student assessment is carried out in other ways, as well. Students keep their written work in bound composition books called their "journals," which are supposed to include the time they began a task and the time they finished it. Journals are checked weekly. Students who complete their journals properly earn privileges. Journals found inadequate are checked daily the following week and risk consequences. The teacher holds a weekly or bi-weekly meeting with each student. In addition to the journals, students each maintain a small, spiral-bound "goal book" in which they list "work they're supposed to complete" over the next week or two and check off each task as it is completed.

Assessment of students' progress is often done on the fly. The teacher described how, for example, with arms partially raised she might ask, "Am I an acute angle or an obtuse angle, Johnny?...Now what am I?" This type of check-up is a variation of the traditional Montessori "three-period lesson" that first makes the distinction, "This is X,

that is Y,” then asks the simple multiple choice, “Which one is X?” and finally asks, “What is this one?”

Regarding assessment standards, the teacher explained, “‘Satisfactory’ to [one child]...who is really struggling with his writing is so much different than ‘satisfactory’ to [another]. It is satisfactory for his level and his ability right now.” When a child does work that is not satisfactory for his ability, “then he goes back...It’s treated not as a low grade, but...an opportunity to go through this and re-edit. It’s time to redo this.... The energy that goes into something...is more what I’m looking for.”

In this brief observation, it was difficult to characterize the atmosphere of the class. The buzz of collaborative work mingled at times with sounds of minor conflicts and disagreements. The degree of students’ engagement in their tasks seemed quite varied. It appeared that those who were less well-engaged were behaving respectfully nonetheless, and there seemed to be general compliance with the rules and procedures.

Disciplinary procedures at Highland are required to be consistent with those officially followed by MPS. The language of “choice” seems to be in use, e.g., “You can choose what to do, as long as you don’t choose to talk.” In the elementary room, a conventional disciplinary sequence is employed, in which names of children who transgress the rules are written on the board. A checkmark after a name indicates recess will be missed, two checkmarks mean a week of recess, and three mean a parent will be contacted. A time-out bench outside the classroom and time in the principal’s office are also utilized, in instances such as conflicts between students. As teachers gave corrective instructions, their gentle hands on shoulders or tummies indicated that such measures tend to be exercised with sensitivity.

The principal explained how the developmental appropriateness of the school’s multi-age grouping had been crucial in helping several children settle into their student roles. Several children who had at times been unruly in the primary class last year became much better able to cope in the elementary class this year. Not having begun with their peers at age 3, they had entered the primary class with too few older role models. In the elementary class, however, older students modeled appropriate behavior, showed what kinds of work the new entries could eventually be ready to do, and made efforts to support their success. In the elementary class, individual students help maintain order by occasionally ringing a small bell that brings everyone to attention, then asking the class to lower their voices.

Highland’s staff wrestles with the conundrum that simple, elegant materials presented in explicit, precise ways that have always attracted young children may no longer be sufficient to engage those raised in homes that reflect the today’s fast-paced, hyper-stimulating society. Still, in their demonstrations and their demeanor, the primary teachers model the slow, exaggerated movement and clear, deliberate speech characteristic of the Montessori method. They might admonish, “We’re in Highland now, so we’re going to move very slowly.” Teachers maintain a soft voice even as they inform students of consequences for inappropriate behavior.

As in any school, teachers are responsible for planning as well as carrying out their students' instruction. The elementary teacher does not have a formal break during the school day. In addition to her responsibilities during class time, she dishes out lunches to her students and accompanies them to their swimming class. Teachers are welcome, although apparently not expected to take part, in most parent-oriented activities such as parenting skills classes.

Computers, as currently configured at Highland, are considered by staff as an add-on and an opportunity for enrichment. The Macintosh computer lab supplied by Title I is staffed by an MPS paraprofessional. There is no internet connection. Students age 5-9 use the computers for keyboarding and for typing up their research.

For special education services, Highland is paired with a nearby public school to share that school's personnel and resources. Beginning next year, MPS charter schools will contribute funds to a new high-risk insurance pool that will enable Highland and its counterparts to afford services for severely handicapped students who may enroll.

Highland from time to time receives assistance from older students. College students from nearby Marquette University have helped primary children in reading and language. Several football players from the nearby Jesuit high school were valued for their work with the toddlers. In the past, students from Milwaukee Area Technical College have come to Highland as part of a child care practicum.

The concern for families and the broader community is manifest in many ways at Highland. Each family is required to contribute 36 hours of time to the school each year. Parents are encouraged to visit classrooms and to contribute whatever skills they may have that are appropriate to the age of the children. "No TV Week" incorporates an overnight with sleeping bags at school in which the fathers tell their favorite stories and read aloud to the children. Parents are welcome to attend meetings of Highland's board, staff meetings, and curriculum meetings. New parents are given a parent mentor who attends meetings with them until they feel confident to serve and make decisions.

As part of the concern about cultural diversity, a different nation or culture receives schoolwide curricular focus including a parent evening approximately twice a year. The evening generally includes a meal, a visitor, and other things from that culture, such as dance or poetry. Although the student population is predominantly African American, the school is not Afrocentric, and the cultures studied are truly varied. Field trips at Highland are more frequent than in the public schools and tend to be participatory, including neighborhood clean-ups and helping out at a neighborhood facility for homeless families.

Highland provides workshops in parenting and discipline strategies. These sessions are described as mandatory, and parents who do not attend are reminded, subtly pressured, and helped to attend the next time. To summarize the process described by one staff member: parents are embraced, they thereby feel empowered, and they then

become involved. If someone were not putting in the time, “people would bend over backwards trying to get that person to fulfill the commitment time.” As a charter, they are constrained from expelling a family if the 36-hour commitment is not fulfilled. They state, however, that their interest has always been to encourage parents who have difficulty taking part. Rather than making the hours a hurdle that causes elimination, “we want to reward [participation], support it, address it at every level.... Can they come on weekends? At night? Morning?”

The small-school environment at Highland is said to facilitate frequent in-person communication between teachers and parents. About half of all parent-teacher conferences are held in the home rather than at school. During home visits, the agenda goes beyond the child’s work. Teachers take the opportunity to look at the home environment, ask questions such as where the parent and child read together and where there is quiet space for doing homework. Trying not to be overbearing, they may suggest ideas other parents have successfully used to provide a more consistent, nurturing home environment for the child.

To people at Highland, developing respect for others ranges from cultural sensitivity to lunchroom manners to a verbal commitment to principles of peace and respect. “We’re a bit obsessed about that kind of sensitivity.” Parents are asked to take part in two events each semester around the theme of respect. In a candlelight ceremony, they pledge how they plan to be peaceful as a family and at school, and they commit to working toward peace in the neighborhood or more broadly through any of several outside organizations.

Hot lunches, scrupulously prepared on site, appear to be nutritious. Because many students come from homes where proper diet is not always provided, one teacher took part in a nutrition class sponsored by a whole-grain baking company so that that her class could receive regular deliveries of breads. The children are welcome to eat them in the classroom and take them home.

Tragedy is not unfamiliar to Highland’s community of families. Dialogue among the four- and five-year-olds included, “My daddy’s in jail. The police shot him with a gun.” The teacher confirmed that a father is in jail and added that one Highland boy died in a house fire this year along with his sister. Two young children of Highland parents recently died of illnesses. The school community raised money and food for the families. Teachers broach these issues with students when appropriate, individually and in small groups. If a family needs social services, staff members and/or parent volunteers try to help them make that link. The parent coordinator position has been cut from the budget, although that person continues as school cook and would reclaim the position if and when it opens again.

Effects of Innovative Program

Assessment plan. Student assessment requires a great deal of record keeping. Because lessons are nearly always presented to individuals or small groups rather than to

the entire class, the teacher must be able to keep track of which students have received each presentation and which ones have pursued the activity on their own. Record keeping is crucial to the teachers' ability to be organized: "Sometimes you have to present a lesson in increments and know when they've practiced the first part...and when you can get back to it." In the primary classes, teachers jot down notes at the end of the day to remind themselves which children have done what tasks. In the elementary class, the record sheets serve that purpose.

The school's most recent charter contract requires that Highland meet five of six criteria that essentially compare the charter school to the average across MPS schools. The criteria include attendance rate, mobility rate, scores on state tests, achievement based on school-defined standards, and gains in scores on district-wide tests across all Highland pupils as well as specifically among pupils achieving below grade-level expectations. (See Part II of this report for details.)

Five-year-olds are assessed individually three times a year by their teachers using MPS diagnostic forms that include letter sounds, counting, rhyming, and printing. The assessment has been modified at Highland to suit the Montessori curriculum. The lab of Macintosh computers installed as an element of Title I includes software that indicates students' competency levels in reading and math. Highland recently gave the statewide 3rd grade reading test. At this writing, it is unclear whether 2nd or 3rd graders at Highland or other MPS schools will be required to take district-wide standardized achievement tests in the coming years.

Representative samples of students' work are maintained in portfolios. They are shown at parent teacher conferences and serve as evidence for grading. The grading scheme on the elementary level report card is process-oriented rather than outcome-oriented and includes the grades: Presentation (P)--"child was involved in that lesson;" Exploration (E)--"child was involved in further lessons and study" in the topic; and Needs Reinforcement (NR)--"child needs further support and understanding of the concept presented."

Assessment of Highland's attainment of its community involvement mission is largely informal. The extent of such attainment would seem to be reflected in the staff's dedication to working with parents, in the actual participation of parents at school, and in the parents' actions at home and in the community.

Assessment findings. The principal was highly confident that the school would have no difficulty meeting all six criteria set forth in the contract. He commented on the difficulty of quantifying something as intangible as the support experienced students provide for new ones. "Statistically I can't write that up in a way that looks great on a report, but I see it as part of the culture that's created within this building. Partly because of our size and...the interpersonal model." Anecdotal reports are also given credibility by staff. For instance, parents often report during conferences that their children apply things they've learned in school at home: "Oh, my daughter is putting her hand on my shoulder to get my attention. My son talks about how we use peaceful words in our

classroom.... My child is sweeping up after themselves...helping with the dishes...noticed that it needed to be dusted.”

Although classroom record-keeping methods were described to the observer, the care with which they are kept could not be ascertained in the allotted time. The results of direct instruction in the elementary class have not, of course, been systematically compared to other possible methods. The teacher reported, however, that the child for whom direct instruction was initially adopted “can retain his sounds....It’s not like starting over every day.” The other students are said to enjoy the group support of the method and to have benefited from it.

Charter school influence. According to the principal, information about Highland’s program has been disseminated in various ways. Staff of local day care centers have visited the school. Highland has encouraged MPS to form a “round table” of Milwaukee Montessori schools. Highland receives numerous inquiries from private schools interested in becoming charter schools. Tours to visiting educators and school districts are facilitated by the Institute for the Transformation of Learning at Marquette University. The school has participated in a number of graduate research studies. Various extensive surveys have been completed and returned.

Conclusion

Highland’s program is clear and coherent. Although unconventional, Montessori is practiced so widely in America today that it can no longer be called an innovation. Still, in its melding of Montessori with a commitment to the children’s families and community, Highland is both unusual and appropriate--and apparently successful. There seems to be no single person without whom the program would falter badly. Highland’s small size enhances relationships among parents and teachers and between teachers and students. Whether increasing its enrollment would affect those relationships is unknown. There is room inside to increase the number of classes, although the outside play area is rather limited.

The actions of teachers and students in the primary class were very much as would be expected in a Montessori environment, which is in turn highly indicative that the expected learning was occurring. The atmosphere seemed peaceful, even as some children’s interactions became contentious. In the elementary classroom, a rigorous record-keeping system was described; the teacher appeared patient, conscientious, and caring. The relationships among the students and the ways students relate to and use their instructional materials are more complex than in a primary class. How fully the elementary program is carried out and how effectively it meets the needs of its children--especially those who might have difficulty coping with a more traditional school environment--was not immediately evident.

Highland’s staff appear to be highly knowledgeable in Montessori education and committed to the aims of the program. They seem to act with consideration not only for the developmental levels of the students but also the sociocultural behaviors, negative

and positive, that the students bring with them. The presence of more than one teacher and/or an aide in each of Highland's classrooms enables them to discuss the students each day and bring more than one perspective to the assessment of student progress. Notwithstanding these benefits for the students, the teaching schedule for a full-day class at Highland does not include a formal break as public school teachers generally have. Furthermore, as a non-instrumentality school, Highland's salaries are lower than the district's scale. Despite the principal's suggestion that the teachers could bargain as a unit, it is uncertain how the budget or the sense of community at Highland would tolerate that kind of activity.

Staff members have visited other schools on professional development days. It was not clear whether they visit schools other than Montessori. Visits to other types of schools could be beneficial inasmuch as Montessori teachers can be susceptible to a parochial or insular perspective on curriculum and instruction. Short-term teacher exchanges with local Montessori public schools could be beneficial, as well.

Direct instruction, employed to teach reading in the elementary class, seems incongruous with the measured, calm presentations characteristic of Montessori method. It could be argued, however, that the rapid-fire unison recitation of direct instruction is consonant with the life experiences of the school's inner-city, mostly African American children. Furthermore, children of elementary age do not "absorb" the silent, almost mystical demonstrations as they did when they were younger. It could also be argued that the precision of direct instruction's form and expectations are analogous to the precision of Montessori materials. Direct instruction's injunction to go back and re-present a word to the child who said it incorrectly may be analogous to the ability of a sensitive Montessori teacher to adapt a presentation to cues in a child's attitude or verbalizations. Perhaps, though, there is a need to consider more thoroughly whether the aim of teaching a child with special needs to read warrants replacing constructivist pedagogy with behaviorist pedagogy for an entire class.

The capable and responsible use of computers appears to be more of an obligatory afterthought than an integral goal in Highland's overall plan. Computers are not seen by staff members as necessary for the development of the primary children. In addition, having the older students type their reports may conflict with the taught value of taking time to create work products that are beautifully handwritten and decorated.

Oversight from MPS, the chartering agency, was minimal until this school year. For the purposes of Title I, Highland had been considered a non-public school by MPS until this year. In Highland's four previous years as a charter, the staff felt the school was hardly noticed by MPS. It was difficult in those years to receive services or even to get answers about services. This year, however, they felt that with its new office for charter schools, MPS was well organized in its charter efforts, prompt in its responses, and paying Highland Community School sufficient attention. On the other hand, the principal was concerned that amount of paperwork required by the district and the time spent in conversations initiated by the MPS administration were diverting time and energy away from pursuit of the school's goals.

Highland has been disseminating program information to Montessori and non-Montessori schools. This dissemination appears to be a result of charter school alliances and Highland's association with Marquette University's Institute for the Transformation of Learning rather than the formal agreement with the school district. Non-Montessori teachers from K4 through 3rd grade, as well as administrators and parents, could benefit from observing at Highland. Highland's culture of community involvement is inspiring. How a school can attain what one staff member calls Highland's "level of intimacy" (e.g., coming into homes without being considered intrusive by either staff or parents) is a topic worthy of attention from other schools. This intimacy was achieved prior to charter status, but the ability to maintain the intimacy and teach others how it is done should be enhanced as a result of the charter.

The school deserves to exist. It could have continued to exist as a private school. As a charter school, Highland still hires teachers of its own choice, enforces a geographic enrollment area, and is selective about parents. But it enjoyed these same privileges before becoming a charter school. The ability to accommodate children with moderate to severe disabilities is increased through its charter status. It remains to be seen whether the increased funding and other elements of security provided by the charter agreement enable Highland to expand, which was the school's main reason for seeking a charter.

Affiliated Alternatives

Background

Affiliated Alternatives is located in the city of Madison and is housed in a building that has evolved from earlier office/industrial use. It is a charter school that serves as an umbrella organization for several distinct schools (programs). It is chartered as an instrumentality of the Madison Metropolitan School District (MMSD). As originally chartered, Affiliated served largely at-risk students in four programs in grades 7-12. The charter grew out of existing alternative programs. Currently Affiliated Alternatives serves students from grades 7-12 in what are essentially eight different programs. Each program has its own focus and its own admission criteria and its own goals, but all are included within the same charter. All the programs are classified as alternative programs. The programs of Affiliated Alternatives are:

- Accelerated Learning Academy (ALA), which serves students in grades 7-10;
- Work and Learning Center (WLC), which serves students at least 16 years of age and who should be in their third year of high school;
- School-Age Parent Program (SAPAR), which serves pregnant and parenting students;
- Cluster, which serves students in grades 7-8 as an alternative to expulsion;
- four School-Within-A-School (SWS) programs, one from each of the four Madison high schools.

ALA, SAPAR, and Cluster, and WLC are located at one site; WLC also has a second site. The SWS programs are each located in the high schools with which they are affiliated, except for one SWS that is housed in a church. The total enrollment indicated by the principal of Affiliated Alternatives for all the schools under its umbrella is approximately 225 students in grades 6-12. (It is not clear whether this total includes all the SWS programs.) Students apply to participate in these programs. Admission practices include an interview. According to the principal, "Students have to interview and express commitment to the philosophy, rules, and requirements to be accepted, and if they fail to meet expectations they can be exited back to their home schools of attendance." ALA, WLC, SAPAR and Cluster are unified under the aegis of the Stanford University Accelerated Schools. In 1997, staff members from ALA, WCL and Cluster participated in Accelerated School workshops at Stanford.

As explained in *The Accelerated Schools Resource Guide*, a product of the Accelerated Schools Project, Accelerated Schools embrace a philosophy and process as opposed to adopting a reform package. Three main principles posited by the project are, for the most part, absent from traditional schools. These principles are "Unity of Purpose," "Empowerment Coupled with Responsibility," and "Building on Strength," which will bring about "powerful learning." According to Affiliated Alternatives, the Accelerated Schools Project defines powerful learning as taking place when the

curriculum meets five criteria. A curriculum that leads to powerful learning must be:

1. authentic, i.e., it draws on learner strengths and interests;
2. interactive, i.e., there is collaboration among learners and with the real world;
3. learner-centered, i.e., students construct knowledge through exploration and discovery;
4. inclusive, i.e., all learners are engaged;
5. continuous, i.e., it builds on prior knowledge and uses a variety of disciplines and learning environments.

The total number of faculty members, as reported by the principal, is 26. However, it is not clear whether that number includes positions such as school social workers, counselors, or librarian or which ones are assigned to Affiliated Alternatives fulltime. For teacher licensure information, see Table 6.

Table 6
Wisconsin Licenses Held by Teaching Staff at Affiliated Alternatives.

<u>Type of License</u>	Number of Teachers
Regular license; teaching in area and grade level of license	8
Regular license; expired or teaching out of area or level	n.a.
Charter license (in addition to regular license)	7
Charter permit	0
Unlicensed	0
Total Teaching Staff	20

Source: Licensure information provided by DPI as of April 6, 2001.

Note: Information provided includes only the School Age Parent, Work and Learning Center, and Accelerated Learning Academy Middle School programs. School social workers (4), counselors (2), and librarian are not included. DPI coding does not in all instances clarify whether teacher is within or outside of licensed area, e.g., licensed in English but assignment code indicating school age parent program. Degree information and whether teachers were in or outside their grade/area were not requested from the school.

Intended Innovative Program

According to “A Guide to Madison's Alternative Programs,” which includes descriptions of the programs in Affiliated Alternatives as well as the other alternative programs in MMSD, the alternative programs are “designed to give a wider range of appropriate education options to students. These alternatives provide a continuum of

choices that allow students to develop skills and successfully transition to their next learning environment....”

Accelerated Learning Academy enrolls about 60 students in grades 7-10. Students choose to attend. They are residents of the Madison Metropolitan School District who are “at risk,” as defined by the state of Wisconsin. According to the principal, however, a student who is not at risk could attend ALA. Strengthening academic skills and establishing a pattern of regular school attendance are among the goals of the school. An aim of the school is to transition students back to a regular high school or another alternative program that will lead to the completion of secondary education and a diploma or GED/HSED. The program is designed to provide small classes and a community atmosphere that allows students to develop a sense of belonging. As one teacher put it, they want to provide “a more individualized approach to students who work better in a smaller school community.”

Work and Learning Center enrolls about 64 students who are at least in their third year of high school, in terms of time enrolled but not in terms of credits earned or progress toward graduation. Students choose to attend. They are residents of the Madison Metropolitan School District and meet the Wisconsin definition of being “at risk.” Students enter the program in groups of sixteen and remain together for the two years of the program. The school offers students the opportunity to earn a high school diploma by successfully completing a four-semester program that includes a half day of classroom instruction and a half day on a job site.

Each of the four semesters in the classroom and on the job site is organized around a theme. Establishing regular school and work attendance are among the aims of the school. Additionally, the school aims to develop the skills of students to be successful workers and to prepare them to pursue full time employment or further training in a vocational-technical college or some other institution of higher education.

The ***School-Age Parent Program*** enrolls approximately 45 students in grades 7-12 who are residents of the Madison Metropolitan School District. Most of the students meet the state definition for being “at risk,” with low achievement and truancy being at-risk factors in addition to pregnancy. The aims of the program are to strengthen academic skills, to provide support and education that will result in a successful pregnancy and successful parenting, and to prepare the student to return to her home school or another alternative school that will enable her to complete her secondary education with a diploma or GED/HSED. Students may attend SAPAR for no more than three semesters. For juniors and seniors the program may constitute their high school completion experience.

Cluster enrolls a maximum of eight students, who are referred by an assistant superintendent. Students attend as an alternative to expulsion, so it is not a school of choice in the manner of the other schools. The program is highly structured. Participation is limited to one semester. The students attend Cluster in the morning and participate in Project Bootstrap, which is sponsored by Dane County, in the afternoon.

The aims of the program are to strengthen students' academic skills and social and occupational development and prepare them to transition back to the home school or another alternative program.

In addition to the programs housed at Affiliated Alternatives, there are four School-Within-A-School (SWS) programs, one from each of the four high schools. (Enrollment figures were obtained for two of the four programs.)

East High School Crossroads serves 9th grade students who have earned fewer than three credits toward high school graduation after their first year as 9th graders. Students attend by invitation. At this writing, the enrollment is understood to be 26 students. The aim of the program is to improve academic skills, to improve attendance, and to help students develop the “work ethic” that will enable them to succeed in high school or an alternative school. Students can earn credits sufficient to give them junior standing in their third year. The school is housed in the lower level of the Christ Presbyterian Church, about one mile from East High School.

West High School-Within-A-School at Neighborhood House serves students who have been retained in 9th grade, regardless of the number of times retained. Students attend by invitation. At this writing, the enrollment is understood to be 30 students. The program is housed in the high school. The aim of the program is to improve academic skills, to improve attendance, and to help students develop the “work ethic” that will enable them to succeed in high school or an alternative school. For students who return to West High School after completing SWS-NH there is a second-year program that includes academic classes for credit with a Pass/No Pass option and work experience for credit. Students can earn credits sufficient to give them junior standing in their third year.

La Follette High School On Track serves students who have been retained in 9th grade, students “who achieved marginal promotion to tenth grade,” and current 9th graders who are not making sufficient progress to avoid retention. The program is housed in the high school. Students are mainstreamed in core classes and have some self-contained classes for skill building.

Memorial High School Connect serves 9th grade students who are having difficulty making the transition from middle school. Students are initially identified through mid-quarter teacher “status reports” as not being successful. Final determination for entrance in the program is based on performance at the end of the first quarter. Students receive “intensive instruction in core subjects.” There is also reading instruction and a career/vocational aspect to the program. Students are monitored after they leave the program and enter 10th grade. The program is housed in the high school.

The SWS programs, although part of the charter, are largely operated independently by the respective high schools. The Affiliated Alternatives principal noted that his responsibility with the SWS programs is to prepare the budget and provide staff development. An assistant principal at the respective high school carries out the other

administrative responsibilities as part of his duties with the high school. The SWS program existed prior to the charter school. The Affiliated Alternatives principal noted that the character of the SWS program changed in each of the high schools since they became part of the charter school. They are now different from each other, except that they all serve students who experience academic and/or attendance difficulties. West High School is in the third year of its program; East High School is in its second year; Memorial and LaFollette are in their first year.

The documents from MMSD do not identify a particular approach to education intended for SWS (such as Accelerated Learning), but do identify characteristics to be present in the schools. The "Petition and Agreement" states that at the time of the charter petition SWS offered a low (16:1) student-teacher ratio so that assignments could be geared to individual needs and more personal support and academic help would be available to students. Career development opportunities including career counseling, development of employability skills, tryout employment, and on-the-job training are also described as part of the program. The petition also states that upon becoming a charter school, at least one SWS site will develop, as a new mission, a program aimed at students retained in 9th grade.

The Accelerated Schools model is the antithesis of programs that emphasize remediation. The determination to move to an "accelerated" program was based on the literature on academic achievement of at-risk students. The literature showed that remedial programs essentially operate by "dumbing down" content with the result that students fall further behind. Accelerated takes the opposite tack, that is, that ways need to be found to make the curriculum more challenging. Writers cited in the documents, such as Pogrow, showed that a curriculum based on higher order thinking skills brought about improved academic achievement. Other research work cited in the documents, done by Newman and Wehlage, revealed the same thing: students in schools with "high pedagogy" achieved more than students in schools with "low pedagogy."

According to the document entitled "Taking Stock: Inquiry About Madison Wisconsin's Secondary Accelerated School Programs," the four programs have a common purpose: "to effectively serve students who were unsuccessful in mainstream school programs." Also common to all programs is the requirement that students attend 90% of the time in order to remain enrolled.

Implemented Innovative Program

ALA, WCL, SAPAR, and Cluster show evidence of the influence and attention paid to the concepts of accelerated schools. For example, the selection of job sites conforms to the concept of collaboration between the learner and the real world.

Several unusual characteristics are common to the four programs. One unusual is that student advancement is not based on seat time and credits earned but on work accomplished and on meeting certain criteria that the student has agreed to as a condition of participation. Although somewhat similar, each program has slightly different criteria.

All programs require that a student attend 90% of the time, based on minutes rather than class periods. ALA and SAPAR require that students pass five out of six classes and WCL requires that students achieve a 90% score on all assignments and tests. These are conditions that must be met in order for a student to remain in the program.

Another unusual aspect of the programs is the scheduling and organization. Again, although somewhat similar, each program is slightly different. ALA has regularly scheduled classes in the core subject areas of English, social studies, math, and science in the morning and elective classes in the afternoon. The students are divided by grade, 7th-8th and 9th-10th and remain with that group for the core subject classes. WLC students meet as a group of 15 students who have one class all morning with one teacher and then go to a job site in the afternoon. SAPAR students start their day in one of four “home bases,” allowing them to start with the same group of peers. Cluster students are maintained in one group. According to the principal, the purpose for this kind of scheduling and organization is to “increase the social bonding with peers and with teachers as a powerful way to counter the negative school experiences that have been a major part of the past for most at-risk students.”

A third unusual aspect of the programs, common to them all, is the half-day make-up time. Students “who meet all expectations of attendance, punctuality, work completion, and level of achievement...do not need to make up time or work...” and are released from attendance on Friday afternoon. The purpose is to provide an incentive to maintain performance and commitment to the program.

Accelerated Learning Academy. The Accelerated Schools model is the means for implementing the goal of increasing academic skills. The program is organized so that 7th and 8th graders are together as are 9th and 10th graders in cross-discipline classes in core academic areas. There is a staff of four teachers, two for the 7th and 8th grades and two for 9th and 10th. Within each team, one teacher teaches English and social studies and one teaches science and math. Because all students spend the morning in the core curriculum with the same group of peers and teachers, there is the opportunity for bonding and creating a sense of community. In the afternoon students may choose from a variety of electives such as physical education, cooking, creative writing, and a course that takes them into the community to study the characteristics and demographics of Madison.

The curriculum is intended to conform to the philosophy of accelerated schools by being based on real world matters. For example, one teacher wrote:

Curriculum in science class is based on themes likely to be of interest to a variety of students now, rather than of interest to a few students...[A]nimal biology is taught based on its relationship to humans with topics such as ‘animals we use for food’...rather than the traditional kingdom, phylum, etc.

Similarly, instruction is intended to be individualized. In this regard a teacher wrote:

Another way I try to accommodate students with different learning styles is to give students choices within the curriculum...[S]tudents need to do a cumulative research project. However, how they present it is up to them. It can be a written report, an oral presentation, a model that they build, etc.

In a math class observed, each student was engaged in a learning activity that was uniquely his or hers. The teacher consistently worked with each student, individually, as the student requested help. The math being taught in the class ranged from simple arithmetic to aspects of trigonometry. Materials ranged from pencil and paper worksheets to hands-on models that served to make the math concrete. The class was very informal. Students called the teacher by her first name and called out for her when they had a question. This is the case throughout ALA. The rationale for this practice as stated by one teacher, is to create “a more informal, relaxed, less threatening atmosphere for the students. This goes a long way in separating our program from the traditional setting of which these students have many bad memories.”

Conversation was common as students did their work. It did not seem to be a distraction and only once did the teacher feel it necessary to ask to have it toned down. Students remain in the same group for all these classes, as a way of creating a sense of community and bonding with each other and their teachers. One of the teachers put it this way: “Students develop a level of comfort in this atmosphere and are more willing to open up, ask for help and engage in the learning process.”

After the morning of core subjects, students are engaged in electives in the afternoon. They participate in the selection of electives by suggesting topics and then by voting on them. Selecting electives is intended both to exploit student interests and experience as well as to make them participants in determining their own educational needs. These classes are, as one teacher wrote, “carefully mixed to promote community building across grade & cultural & gender levels within the school setting.” Elective classes are scheduled in two hour blocks to provide opportunities for hands-on activities and field trips.

Work and Learning Centers. Work and Learning Center is a two year program. The curriculum is organized around four distinct themes that provide the basis for both classroom instruction and work site placement:

1. human interaction (child development, effective parenting, marriage and family);
2. consumer competence (how to rent an apartment, balance a checkbook, get a job);
3. citizenship and law (individual rights and responsibilities, government);
4. identity (discussion of difficult world issues, personal decisions, post high school decisions).

Students attend classes in the morning and go to work sites in the afternoon. Each semester, students have an individualized math program and literature that relates to the theme. Students spend the entire semester with one teacher who provides the classroom instruction around the particular theme and also supervises the site placement.

Two semesters of job placement are prescribed. The work may be voluntary or paid. Students must work with young children for a half semester, and with the elderly for a half semester. They must also work for one whole semester in the construction trades area, refurbishing homes for low income families. The other two semesters of job placement are intended to stress career development. A variety of instructional strategies are employed. One teacher stated:

I attempt to instill a team approach to learning in my classroom. In addition to individual writing activities, we do lot of small group learning activities. We also use formal discussion activities of issues important to our curriculum. These activities help students clarify their positions on specific social issues.

The teacher for the last semester stated, "My curriculum also focuses on career goals as part of [the theme of] identity. Our activities look at personality issues as they relate to careers. This is accomplished through various computer-based and paper-based assessments." Similarly, curriculum materials reflect the theme. The teacher continued:

The books we read in class are written by authors who, as teenagers, faced many of the obstacles our students have...to face. The content of these autobiographies also provides opportunities to discuss these issues in class. Other readings we do encourage students to formulate a philosophy on how they will enter life as a productive citizen.

The class observed appeared to embody the principals of powerful learning of the Accelerated Schools Project. The class was involved in a discussion of the book that they were reading. One aspect of the book involved the relationship of a teacher to students and the conflict of values and behaviors among the students, the teacher, and the authority figures in their lives. The teacher provided open ended questions (e.g., "What should that character have done?") and some interpretation. During the discussion, the student responses and interpretations led to consideration of the question of the difference between law and justice, which would be an aspect of the next day's reading. Students were also given a quote to write about in their journals as background for essays they would be writing. The discussion of the book led them through aspects of their own behavior and the behavior of others. Someone suggested, "If you come off too strongly, people won't listen." Comparison was made to the recent MMSD decision to hire a counselor for gay and lesbian students. "Who would be opposed to a gay counselor?...Does the counselor need to be gay?... Has anyone talked to [the counselor who works with the program]?"

This discussion led to further discussions on how decisions are made by the school board and about a recent case in another community where a mother had provided

condoms to her teenage son. “Can a person be pushed to be gay?” Eventually, they arrived at the issue of whether we are who we are because of nurture or nature. Student attention and participation was quite high, even as one student rolled cigarettes, one student slept, one applied her make-up, and one threw ketchup packets at the waste basket. Still, they participated in the discussions, and the teacher made a special point to compliment the students for being respectful to each other and each other's opinions.

School Age Parent Program. As one teacher wrote, the goal of the School Age Parent Program is “to prepare girls for pregnancy, childbirth and the role of parenting emotionally, physically and intellectually.” Pregnancy and parenting education are taught through formal courses of study. The formal course of study is complemented by the opportunity for students to work in day care centers. They also receive medical and social support services. The academic portion of the program employs a thematic and interdisciplinary approach. Students participate in determining the themes that then comprise the course of study, which includes English, social studies, and math. Instruction is project oriented. For example, students write a letter to the unborn child, write a birth plan, construct a baby book, and create a resource manual. They also do career searches and job shadowing. Guest speakers are utilized.

The aspects of being authentic, interactive, learner-centered, inclusive, and continuous were evident in the SAPAR classroom. Although very small and cramped, the room is a model of the kinds of things related to birthing and caring for a baby. There are baby furniture, toys, blankets, sewing machines, and other things, including reading material relating to the stages of pregnancy, childbirth, and child rearing. One teacher wrote:

Almost 100% of what I teach is directly relevant & important to these girls. How to take care of their bodies, their babies....This engages the girls in learning. It is meaningful to them. It pertains to their lives and their future.

Classroom strategies including the use of videos, note taking, the use of the internet, and a computer program called the Interactive Pregnancy Progression Program are used to teach the students what is happening to them and the developing fetus. As the teacher wrote, “They must evaluate their own pregnancy, where they are at, they must draw the actual fetus in the stage of development it is in themselves and describe in writing a report what is happening with their body & the baby.” One class of six students was observed discussing the ten reasons for postpartum experiences. An interpreter was present for one girl who did not speak English. Students then worked on their birth plan, entering it into a computer.

In an English class, students kept a journal “to reflect on various aspects of their pregnancy.” Students also researched their family backgrounds and “produce[d] several reflections of their research.” Students watched a video of the Jenny Jones TV show dealing with psychics. The purpose, as expressed by the teacher, was to generate a discussion about the “sham” of psychics. The video was stopped frequently to allow the students to analyze what was going on, why the people involved might have been

engaged by what the psychic said, and how the psychic used incidental information he/she received from the client. Student participation in the activity was very casual, however, with some students not engaged at all.

Cluster. The day for Cluster students is organized with four hours of self-contained instruction with a teacher and an assistant and six hours of activities provided in conjunction with community organizations. Instructional strategies include group instruction as well one-on-one feedback and assistance in both behavioral and academic matters. A program focus is on helping students learn how to be effective students. This focus includes instruction in practical life skills such as maintaining a healthy diet, anger management, and conflict resolution.

Students remain in Cluster for one semester or less. The group is very small, no more than eight students. The curriculum, according to the teacher, is to “teach basic life skill...basic grammar (noun verb agreement) math concepts, research skills with dictionary, encyclopedia and internet. Teach how to learn rather than providing answers.” He also wrote that classroom reflects the goals of the charter because he “make(s) useful, engaging assignments to instill ability and confidence so students learn how to learn.” The Cluster program was not observed.

East High School Crossroads. East High School Crossroads was the only SWS visited. Housed in the lower level of a church, it occupies two large rooms separated by a folding door that can be opened to create one very large, auditorium-like room with a small stage at one end of the room.

The class schedule focuses on the core subject areas of math, science, English and social studies. The morning classes are math, science, and guided study. In the afternoon, English and social studies classes are team-taught. Classes are 50 minutes in length with a 10-minute break between classes. The guided study time, during the mid-morning period, is dedicated to a particular subject each day. Monday is math, Tuesday is science, Wednesday social studies, and Thursday English. As in other programs in Affiliated Alternatives, Friday is not a prescribed day and students who are current are dismissed for the afternoon.

In the classes observed, science and team-taught English and social studies, the atmosphere was very informal. Students were allowed to have food and beverage in class. In the science class, half the students were in guided study, while half took part in both small group and individual instruction. Individually and in small groups, students were working on an assignment about the planets and were seeking information on the computer, using World Book Encyclopedia on CD. Two students worked independently from a text copy of the encyclopedia. The instructor worked with the individuals and groups on an as-needed basis as they sought the answers to the assignment questions. There was very little in the room to suggest that it housed either a science class or a school program. As the teacher explained, inasmuch as the program does not have exclusive use of the facility (it is also used by the church, from whom is rented) there is not much opportunity to set it up as a classroom on a permanent basis. However, there is

a very nice, but limited, plant solarium that is tended by the students as an adjunct to their biology study.

The team-taught English and social studies class was comprised of all the students in the program. Students sat in chairs at long tables. As with the science class, there was not much to suggest it was a school or a classroom, although there were some signs and posters on the wall. The class began with a current events activity. From newspapers or periodicals that they either brought with them or were available in the room, students identified a current event of interest on the local, national, and/or international scene. The teacher called on students to share the article and explain why they thought it was important. As one of the teachers conducted this part of the class the other monitored and answered individual student questions which may or may not have been related to the activity. There was also some reprimanding of students for not paying attention or talking. Students watched the end of a movie, *Animal Factory*, which they were to compare the short novelette, *Shawshank Redemption*. The students were given a short quiz about the comparison. The teacher helped some of them with the answers but warned others about keeping their answers to themselves. The atmosphere was not very test-like, with much talking.

Effects of the Innovative Program

The principal of Affiliated Alternatives estimated that in January about 22 of the 30 students in WLC received diplomas, and he expected the number to be about 26 in June.

The assessment of the four accelerated schools that are part of Affiliated Alternatives (ALA, WLC, SAPAR and Cluster) is contained in the document "Taking Stock: Inquiry About Madison Wisconsin's Secondary Accelerated School Program." The concept of taking stock is part of the process of being and becoming an accelerated school. The most recent and only existing completed assessment is from 1999. In addition to an overview of each of the programs, the document contains the results of surveys done with students, parents, and staff, as well as student interviews. Additionally, the staffs of the programs were divided into five "cadres" to explore five specific areas: (1) School Participation, (2) Curriculum and Instruction, (3) Student Achievement, (4) Community Relations, and (5) School Climate.

The student survey, administered in the spring of 1998, asked 27 questions covering a wide range of topics about student life in relation to the school. Students could select from five responses ranging from "strongly agree" to "strongly disagree." "Strongly agree" and "agree" were the majority of responses on all but four items. These items were "I regularly receive our school newsletter...", "I have homework every night," "My school is viewed positively by other students in Madison Public Schools," and "I participate in extra-curricular activities."

The parent survey, also administered in the spring of 1998, asked 33 questions using the same scale as the student survey. "Strongly agree" and "agree" were the responses on all but four items. These items were "I am interested in leading extra-

curricular activities,” “I am willing to lend my strengths/interests to my child's school as a guest speaker,” “I am willing to lend my strengths/interests to my child's school as a classroom assistant,” and “I am interested in chaperoning an extra-curricular activity.” These answers imply that parents of Affiliated Alternatives students are not interested in active participation at school.

The *School Participation Cadre* looked at attendance, data on involuntary termination from the programs, the results of the parent survey, suspensions and expulsions, and student leadership training opportunities. The cadre concluded that involuntary termination from the program was primarily related to attendance and failure to complete work as opposed to disciplinary problems. It also concluded that the interest and support expressed in the parent survey was a basis for believing that parental participation could be increased. Finally the cadre concluded that student interest in the leadership opportunities presented suggested that this interest could be developed further.

The cadre recommended that: (a) issues that deter attendance need to be addressed as to ways to involve parents in students' education and school decision-making; and (b) students need to be exposed to extra-curricular opportunities in their home schools and assisted in enrolling in these activities.

The *Curriculum and Instruction Cadre* surveyed staff, parents, and students across a variety of dimensions. The group found, for example, that the aspect of the Accelerated Schools Project teachers were most comfortable with was “authentic learning,” and the aspect they were least comfortable with was “continuous group learner-centered concepts.” The cadre concluded that based on the parent survey most parents feel that their children are receiving a good education, that communication from the school is satisfactory, and that the curriculum is meaningful and important. Parents were less certain that their child finds the school academically challenging. The student and teacher surveys both concluded that the characteristics of the accelerated school project matched what students thought was a quality education.

In light of Wisconsin's academic standards, this cadre concluded that there were both strengths and weaknesses in the charter school. For example, the WLC curriculum was found to address only slightly more than 20% of the science standards. On the other hand, ALA was found to address 100% of the language standards. Overall, ALA was found to address 88% of the standards, WCL 53%, and SAPAR 64%. The cadre recommended that the programs need to: (a) continue to examine their curricula to make them more challenging and engaging, (b) address their concerns in regard to the Wisconsin State Standards and the high stakes graduation test, and (c) continue to explore how technology can be integrated further into the curriculum.

The *Student Achievement Cadre* examined a wide variety of data including WSAS (precursor to the WKCE) test scores, other test results, grade point averages, job performance evaluations, graduation and transfer rates, and dropout rates. In a review of student job evaluations, the majority of students were rated “satisfactory” or “very good.” The majority of students had a grade point average between .1 and 1.9, on a four point

scale. Over five years, 33.9% of SAPAR students and 43.6% of WLC students graduated. This cadre recommended maintaining or increasing the focus on academic achievement and including means for measuring academic improvement while students are in the programs. The cadre also recommended that the programs develop alternative criteria and paths to graduation so as to recognize the skills and talents not measured by the state achievement tests.

The *Community Relations Cadre* gathered data from three sources: community agencies that work with the programs, professionals within MMSD who work with some or all of the programs, and teachers within the various alternative programs in MMSD. Within the first two groups there were high percentages of respondents who were aware of the programs, who thought the programs were important, and who had a favorable perception of the programs. Staff also had a high percentage of respondents who had a favorable perception of the programs. This cadre recommended that information about the alternative programs be part of the packet for all new MMSD hires and that twice a year, a mailing that describes the specifics of the programs should be sent to appropriate agencies, group homes, social workers, etc.

The *School Climate Cadre* surveyed staff and students. Thirteen of the 16 items on the staff survey had majority “favorable” responses. The responses that had a majority of “neutral” and “unfavorable” were for safety of belongings, parent involvement, and student influence. Eight of the ten items on the student survey had majority “favorable” responses. The two that had a majority of “neutral” and “unfavorable” were school rewards and student influence. This cadre also looked at ethnic and gender make-up of the staff and students and the number of incidents related to racism/sexism/homophobia. The cadre recommended that a gymnasium and a classroom be added.

Conclusion

The fact that Affiliated Alternatives encompasses eight different programs housed at several sites under one charter makes it different from most, if not all, other charter schools. Affiliated Alternatives may best be described as a group of programs that provide alternative learning environments for at-risk students. Although this arrangement is unique in its school district, the Accelerated Schools model is well-established. The feature that perhaps best qualifies as an innovation is the provision by the Work and Learning Center that students receive significant experience working with both young children and the elderly and renovating the homes of low-income families.

Clearly, each of the programs is focused on providing a successful educational environment for its designated population, and that focus is evident in the organization and implementation of the curriculum. The small size of the groups within each program allow flexibility to alter daily schedules. The grouping of students in a manner designed to allow them to develop as a community as well as individually, the flexibility in the curriculum that allows for student involvement in both the content of the curriculum and the manner in which it is to be implemented, the emphasis on personal responsibility, the focus on preparation for either continuing education or an informed career choice, and the

hands-on/real world/thematic aspects in regard to learning all attest to the commitment of the staff and the students to fulfilling the goals of the charter.

Because it has been organized as charter, Affiliated Alternatives has been the beneficiary of opportunities that it might not otherwise have had. For example, ALA, WLC, SAPAR, and at least one of the SWS programs have a selection process by which students apply to attend and are admitted based on an interview by the staff. Although, according to the principal, students who stumble are given every opportunity to right themselves, students who ultimately do not meet the program requirements are removed from the program. Affiliated Alternatives also has latitude in developing its daily schedule. As an incentive/reward for meeting work and attendance expectations, students (with the exception of Cluster), are released from school on Friday afternoons.

Although direct oversight on the part of the chartering entity (MMSD) seems minimal, the document "Taking Stock: Inquiry About Madison Wisconsin's Secondary Accelerated School Program" is a self-assessment tool that focuses on the issues that matter within the concepts of Accelerated Schools. The formation of faculty cadres to assess different aspects of the school seems to have been a valuable project, worth emulating elsewhere. The extensive data they sought and collected is instructive for the school and could be instructive for the community as well as other schools. Within the document are very specific recommendations. The extent to which recommendations have been addressed is unclear. The principal, who is in his first year, stated he had not had time to review it.

It is quite apparent that Affiliated Alternatives is functioning well to serve its identified population. There is commitment to an approach to meet the needs of at-risk students and commitment on the part of the staff to implement that approach. Whether the school's programs, results, and level of commitment require charter status is problematic. A number of other alternatives schools in Madison have been able to exist without charters. Indeed, much of the program of Affiliated Alternatives existed prior to charter status.

The benefits of charter status cited by staff members included the DPI planning and implementation grant monies which allowed them to be trained by Accelerated Schools, the flexibility in teacher licensing, the scheduling flexibility they enjoyed, and the alternative way for determining graduation requirements. Those interviewed were convinced that without charter money the training would not have been possible. They all felt that charter status has helped in some way.

Synthesis

These case studies reveal that, in general, each of the five charter schools has planned and is implementing a quality educational program. For the most part, each school has a cohesive, sound program with strong philosophical or research support. The programs are being used in pursuit of clear, compatible goals, and available evidence suggests that they are successful in achieving those goals.

Spruce's program consisting of thematic, environmental, outdoor curriculum with integrated skills and multi-age, individualized learning centers in a family-like atmosphere, is very consistent with their avowed focus on their rural heritage. The program fits the agrarian setting in which the school is located. Although the school's goals are matched by the program, they are stated in terms of what the school is attempting to do rather than in terms of what students are to come to know or to be able to do as a result of the program. Principal and teacher perceptions, as well as feedback from parents indicate a high degree of satisfaction with the program.

The E. D. Hirsch program installed at Core Knowledge Charter School, with emphasis on content and skills essential in American culture, and delivered through direct instruction, is based on a carefully argued philosophy, augmented with research evidence regarding teaching. The result is a cohesive, comprehensive educational program. It is a fitting complement to the school's goals of academic excellence, skills mastery, broad knowledge in literature, science, and other subjects, and life-long learning interests. Mastery tests, implicit in the direct instruction approach, as well as other forms of evaluation, indicate that Core Knowledge is achieving its goals.

That direct instruction has research evidence that demonstrates its effectiveness cannot be argued, however, more current research and educational thought has led scholars and teachers to question its use as a total teaching methodology. Its focus on reproduction and its group-paced nature have caused Brophy (1992), Rosenshine and Meister (1992), and others who originated the concept and provided data regarding direct instruction to abandon it in favor of a more constructivist approach that builds on the prior knowledge of individuals and emphasizes personal thinking and interpretation. Direct instruction procedures such as presenting information, modeling, and providing feedback are a part of all teaching, but current theory suggests that students are advantaged when these and similar acts are used in a constructivist context, not in a behaviorist context.

Paideia Academy's educational program, built on ideas of Mortimer Adler, also has considerable integrity and consistency. The context and methodology adopted from Adler form a unified whole as implemented at Paideia Academy. Acquiring knowledge in literature, mathematics, science, history and other subjects that compose a liberal arts education through didactic instruction, developing intellectual skills through coaching, and extending ideas through Socratic dialogue are practices that have firm theoretical bases. The broad goals of a liberal arts education, lifelong learning skills, and citizenship, are generally being achieved, according to data from the varied forms of

assessment used at Paideia Academy (e.g., standardized tests, state tests, portfolios, subject tests and 8th-grade theses).

Highland Community School offers a classic Montessori program with the addition of direct instruction in reading. Like the educational programs at Spruce, Core Knowledge Charter School, and Paideia Academy, the program as conceived and implemented is cohesive and comprehensive. Practical, concrete materials based on a child's level of development are used to acquire skills, gain responsibility, and increase self-esteem. Students learning through exploration, discovery, and cooperation with others. Montessori education has a carefully articulated theoretical basis of support. Although Highland's goals are not stated in terms of student outcomes and include attention to parents and the community, the student outcome goals of Montessori are implicit in the Montessori method. The detailed records on each child's development kept by Montessori teachers, the more formal MPS assessments, and state tests lead to the conclusion that Highland is achieving its goals.

Affiliated Alternatives, which differs from the other charter schools in that it focuses on at-risk high school students and is composed of eight separate schools, offers a less cohesive total program than the other charter schools. Its programs are unified in two ways, however. First, each of the schools focuses on improving the poor academic achievement of its at-risk students. For example, Accelerated Learning Academy and Cluster seek to move students back on track to a regular high school, while Work and Learning Center's goal is to help third-year high school students acquire needed credits to graduate. Second, except the four schools-within-a-school, the programs are unified through the adoption and implementation of the Accelerated Schools program. Through the program's emphasis on challenging curriculum and thinking skills (as apposed to remediation), on authentic tasks, on use of students' interests and prior knowledge, and on other more constructivist instructional procedures, strong support is provided for educational programs at Affiliated Alternatives. The goals of Affiliated Alternatives, which in addition to academic achievement include goals peculiar to each particular school such as job experience or parent skills and goals associated with the Accelerated Schools program, are being achieved in a limited way, as revealed by the evaluation required as part of the Accelerated Schools program, teacher comments, and other data.

Each charter school is providing a supportive and generally effective educational program for its students, but it remains to be examined whether each school is meeting the innovation, evaluation, and model provisions of its charter status.

A program can be said to be innovative if it is new or different, if it is a novel change from what typically exists. Given this definition, it is clear that none of the schools provides an educational program that can be called "innovative." Montessori education has existed in theory and practice for almost 100 years. One can find private and public Montessori schools throughout the world. Adler's Paideia Proposal was made nearly 20 years ago and has spawned a number of schools. Hirsch's prescription for education has existed for at least the same number of years and has also resulted in school programs nationally. Direct instruction, as has been discussed, reached the peak of its

influence in the 1970's. In some form such as Hunter's (1982) model or Good and Grouws' (1979) Missouri Math, it was adopted widely. Similarly, Accelerated Schools has spread to hundreds of schools after having been developed in the 1980's. Spruce's rural heritage community focus, although not adopted from prior theory or research, ultimately is not innovative either. There probably are many schools in rural areas that provide the same type of program. The educational program of each school, then, may represent a change in program for that school or the introduction of a program not previously offered in the school district, but a claim cannot be made about the program being innovative.

In addition to using their freedom from normal school regulations to explore and create new educational programs to better serve students and parents, charter schools are to engage in comprehensive school evaluation to demonstrate that their autonomy is producing intended results. Each of the schools is attentive to this evaluation requirement. They administer state and other tests, some compile portfolios, some use various forms of performance assessment, and some engage in self assessment (such as Accelerated Schools' self-assessment procedures). But neither the individual assessment techniques nor the total amount of evaluation in any of the schools appears to be unusual. What the charter schools do in terms of evaluation seems to be what one might expect to occur in any school.

Another expectation of a charter school is that it serve as a model for change. That is, the charter school, being free to experiment, can develop and test procedures that can be disseminated to regular schools. In varying degrees, each of the five charter schools has made efforts to share their educational program through speeches, visitation programs, newspaper and other written articles, conference attendance, and in other ways. Since the schools have not implemented programs that are innovative, it is doubtful that they can serve as models. Schools wishing to change probably would turn to the original proposals or models of Montessori, Adler, Hirsch, and similar theorists or researchers for guidance in developing programs.

A question that remains is, do these charter schools justify their charter status? There is no question that each school provides a strong educational program that is to a large extent reaching its goals, but is charter status the cause of the school's achievements? Charter school status may be helpful, especially in providing funding to launch the charter school, but the educational programs in each of the five schools could be implemented in almost any school. None of the programs is unique to the extent that it could not function in a regular public school. The schools, which really are types of specialty schools, may not appeal to all parents and children. However, in a district large enough to offer parents and children a choice in schools, the schools could exist in their present form without charter status. Charter schools may have other strengths that impact the educational program such as teacher collegiality, parent involvement, and student stability, but non-charter status does not appear to preclude the installation of these five programs in almost any Wisconsin public school.

Part II: Contract Accountability Analysis

Background

Academic accountability is central to the argument in favor of charter school reform. Hudson Institute researchers maintain charters represent a shift in thinking about accountability, from input to output. In their words, charter school accountability means being “clear, specific, and fairly uniform about ends while allowing wide diversity in the means by which those ends are achieved” (Manno, 1997).

Kolderie (1999) suggests that charters earn their freedom from “process controls” in exchange for accountability for results. This places considerable responsibility for insuring academic performance on the chartering agent. He asserts that responsibility for school performance rests with the sponsor and that a sponsor’s oversight and monitoring are critical aspects to determining if a charter school’s academic performance is adequate. Thus, accountability agreements need to be clear and precise in regard to accountability.

Although the charter contract is the key mechanism for establishing a charter school’s academic responsibility, Manno (1997) and Finn (1997) of the Hudson Institute have noted that some charter schools have opted for standardized testing programs that are not appropriate for their stated mission, purpose, or strategies. Consistent with this point, those researchers argue that there must be standards as well as assessments in order to determine if the standards are being met.

In 1998, UCLA researchers identified the loss of the charter for failure to achieve as one of the distinctive characteristics of charter schools posited by reformers (Wells, 1998). To insure that the academic accountability of the charter school is met, the sponsor must assume the responsibility not only for performance but also for determining and carrying out sanctions. Kolderie (1999) asserts, “The charter depends on sponsors acting courageously to enforce accountability. If they do, and schools know they do, then accountability should work at the school level.” Manno (1997), concurring with the need, notes that “the assessment emperor is still wearing few clothes.... Deciding how consequences will be integrated into the student accountability system is a task yet to be taken seriously.... We’ve seen a lot more accountability in the discipline area than the academic area” (p. 11).

Being more accountable to parents and students is also identified by the UCLA researchers as a major claim made by charter school reformers. This accountability is attributed to the fact that the schools are selected by the parents and students (Wells, 1998). As findings, however, they note that boards “often lack the necessary information or political clout to hold charter schools accountable for student outcomes.” As Manno (1999) observes, “Truth be told, they [charter school sponsors] are often content to leave charter school accountability agreements nebulous and undefined” (p. 2).

UCLA researchers also identified innovation as a major claim made by charter school reformers. They noted that reformers embrace the idea that charter schools will be

models of innovation (Wells, 1998). As such, charter schools, “free from constraints, will be more innovative and...innovations will be shared and will foster change in all schools” (p. 10).

Charter School Accountability Under Wisconsin Law

“Wisconsin Charter Schools 1996-97,” a publication of the Department of Public Instruction, states that charter schools are accountable to local school boards in three areas: student performance, fiscal management, and compliance to their contracts and with the charter school law. The publication notes that a school that fails in any of the three areas can lose its charter.

The introduction to the DPI report, “Wisconsin Charter Schools 1998,” describes charter schools as coming into being through a “business like contract or ‘charter’” consummated between an “operator and the sponsoring school board or other chartering authority” (p. vii). It goes on to describe how charters are intended to “foster...creativity” and to be “living laboratories” that will influence the rest of the public school system(s) and provide competition for the rest of the public school systems(s). The chartering authority is to hold the charter school accountable to its charter. In essence, charter schools are independent public schools that have agreed to a *quid pro quo*: “autonomy for accountability” (p. vii).

An attribute of charter schools is that other public school system(s) can observe and learn from the charter schools, which will enable them to make changes without suffering through the “growing pains” (p. vii). As a result, all public schools will be continually challenged to improve.

Wisconsin’s charter school law (ss118.40) was passed in 1993 and amended in 1995, 1997, 1998, and 1999. The current law treats Milwaukee differently from the rest of the state. Throughout the state, local school boards have the authority to grant a charter. In Milwaukee, the City of Milwaukee, the University of Wisconsin-Milwaukee, and the Milwaukee Area Technical College are also authorized to grant charters.

Wisconsin’s charter school law provides that “the joint legislative audit committee may direct the legislative audit bureau to perform a[n]...audit of the charter school program....” (ss118.40(8)). In December 1998, the Legislative Audit Bureau released *An Evaluation: Charter School Program*. In its report the Bureau noted, “The legislature did not include specific goals for the charter school program in the statutes” (p. 9). The statute does require an entity petitioning for charter school status to include in its petition data regarding 15 criteria (12 for the non-MPS entities) related to accountability (ss118.40(1m)(b)). However, the law does not require that a charter school contract’s accountability provisions be met or that a charter be revoked if they are not. The law states only that “a charter may be revoked [if]...[T]he pupils...failed to make sufficient progress toward attaining the educational goals under s.118.01” (ss118.40(5)(b)). The goals referred to in 118.01 are not student performance outcome goals but educational input goals related to the instructional program.

Chapter 118.33 as passed by the 1999-2000 legislature modified school law. By September 1, 2002, school boards must adopt a written policy that specifies the criteria for granting a high school diploma that is in addition to the current law requirements relating to the number of credits and alternative education. The criteria must include the pupil's score on the examination prescribed in ss.118.30(1r)(d), the pupil's academic performance, and the recommendations of teachers. Beginning September 1, 2003, a school may not graduate a student who has not met the criteria. These requirements apply to charter schools as well as regular public schools.

Currently, Chapter 118.30 requires school boards to administer the Wisconsin Knowledge and Concepts Exam in grades 4, 8, and 10. This requirement also applies to all charter schools. Beginning July 1, 2002, the school may administer tests of its own design in grades 4 and 8 but must provide the state superintendent with statistical correlation of those examinations with the state adopted or approved examinations. Chapter 118.33 also requires that each school board adopt a policy specifying the criteria for promoting students from 4th to 5th grade and from 8th to 9th grade. A pupil's score on the 4th or 8th grade exam is required to be included in the criteria (unless the student is excused from taking the test), as well as the pupil's academic performance, recommendations of teachers that must be based on academic performance alone, and any other criteria specified by the board. Beginning in September 2003, a school may not promote a student who has not met the criteria. These provisions also apply to all charter schools.

Finally, charter schools associated with the City of Milwaukee, University of Wisconsin-Milwaukee, and Milwaukee Area Technical College must administer the same tests as other charter schools as well as the 3rd grade reading test (s.118.40(2r)(d)).

Charter School Documents

Each of the schools studied was asked to provide any documents that would relate to the school as a charter school and to the chartering process. Suggested documents were applications and contracts. Administrators were free to include other documents and were encouraged to do so. The school administrator determined which documents to forward.

Spruce School

Spruce Charter School provided the following documents: (1) "Oconto Falls School District Spruce Charter School Presentation 9-22-98;" (2) contract with Oconto Falls Area School Board, dated November 16, 1998; (3) "Overview for Charter Renewal;" and (4) minutes of various meetings of the Spruce Charter Advisory Committee and the Spruce Partners in Education (SPIE) from March, 1999 to November, 2000. SPIE is a parent group.

The “Oconto Falls School District Spruce Charter School Presentation 9-22-98” describes the history of the building and its organization as a two class, four grade school. It describes the change to a multi-age and multi-year format and the planning process that will lead to integrated units in all subject areas using the surrounding environment and community resources. Attached to the document are excerpts from a publication entitled, “How to Manage Your Multi-Age Classroom.” The excerpts include a chart showing what multi-age programs are and are not and research findings regarding multi-age classrooms. The contract is a basic document answering, briefly, the information specified in the statutes. Attached to the contract is a renewal request dated August 9, 1999 and a letter dated May 6, 1999 from the administrator describing the curriculum for the following year. The contract provides only that mandated testing supplemented by authentic assessment activities will be employed. The Advisory Committee and SPIE minutes detail a wide range of activities undertaken by the groups including such things as acquiring equipment and materials, arranging and facilitating parent and community involvement, and helping with field trips. The groups seem very active with frequent meetings that appear to be well attended by the members.

Core Knowledge Charter School

Core Knowledge Charter School provided the following documents: (1) Final Proposal dated January 8, 1996; (2) 1999-2000 Annual Report dated August 1, 2000; (3) Bylaws for the Governing Council dated September 10, 1996 and revised on October 13, 1997 and September 8, 1998; (4) a “welcome” communication describing the background, mission, philosophy, curriculum and instruction, and accountability of the charter school; (5) minutes and agendas of recent Governing Council meetings; (6) description of the K-5 curriculum scope and sequence; (7)) description of the 6-8 curriculum scope and sequence; (8) a promotional pamphlet describing the school, its goals, content, and method; (9) a summary of its Spanish curriculum; and (10) a promotional videotape describing the background and program of the school.

The Final Proposal describes the parent group, Parents Advocating Student Success (PASS), as the petitioning group. The proposal describes the school’s goal and purposes, expected student results, the education program (Core Knowledge Sequence and direct instruction), staff qualifications, fiscal responsibility, the role of partners, accountability plans, parental involvement, and plans to restructure the instruction and curriculum. Appendices of the Proposal include: (a) discuss the philosophy, theory, and research related to the education program and a grade-by-grade scope and sequence; (b) summarize sections of the proposal; and (c) show a budget and the results of a survey. There is a letter soliciting partners and an agreement that would have to apply to partners. Finally, there is a page of amendments that have been incorporated into the proposal.

The 1999-2000 Annual Report, dated August 1, 2000, contains an updated version of the Final Proposal. Appendices show charts, tables, and graphs detailing testing results, the results of a student survey, student progress report forms, service provider information, budget reports, demographic information, the community outreach plan, and a list of community events held during the year.

Paideia Academy

Paideia Academy provided the following documents: (1) "Paideia Academy Proposal," approved by the school board on May 13, 1997; (2) a report that shows demographics for the charter and compares test scores with Kenosha Unified School District schools for 1997-98; (3) a five-year contract with KUSD commencing July 1, 1999; (4) "1999 Wisconsin Charter Schools Short Response Survey" from the DPI; (5) school statistics for the 1998-99 school year; and (6) a letter to parents dated December 15, 2000 detailing test results for the 1999-2000 school year.

The "Paideia Academy Proposal" responds to the information required in state statutes. The education program is based on the Paideia Program of Instruction. According to the proposal, the curriculum will conform to KUSD's Content Standards, stressing basic math skills, thinking and reasoning skills, writing, communication and reading, and analyzing literature. Electives will be integrated into the curriculum. The program is intended to provide a liberal arts education and teach the skills of lifelong learning, successful employment, and responsible citizenship. The teaching methods to be employed are didactic instruction, coaching, and seminars. Students will be evaluated through district and state standardized tests as well as ongoing portfolios. Parent and support groups that include community members will participate in the development of school procedures and programs. There is also to be a student advisory/government structure.

The contract incorporates and expands on the proposal. It specifies that the board may terminate the contract if it determines that students have not made sufficient progress under ss118.01. Attached to the contract is a chart showing building goals in math, reading, language, science, and social studies for the years 1997-98 through 2000-02.

Highland Community School

Highland Community School provided the following documents: (1) A proposal (undated) in response to RFP-266 from Milwaukee Public Schools with a return deadline of January 11, 1999; and (2) charter school contracts with MPS for the years 1997-98, 1998-99, 1999-2000, and 2000-01.

The proposal consists mainly of the "Program Narrative." Included are the Mission Statement and a description of the age grouped divisions within the Montessori program. The proposal also discusses matters such as discipline procedures, parent and student rights, the educational program, support services, parental involvement, and staff development. Included in the document are resumes of the staff and financial and audit information.

The initial contract period for Highland Community School was for three years (1997-1999). The contracts for those years are in most respects the same, with

differences due only to updating of numbers and dates. The contract was extended by agreement for an additional year (1999-2000.) On September 26, 2000, the MPS Board entered into a five-year contract with Highland Community School commencing in the 2000-01 school year and ending at the end of the 2004-05 school year. The current contract is similar to the earlier ones. All provide the information required by the statutes.

Affiliated Alternatives

Affiliated Alternatives provided the following documents: (1) a memo to the Board of Education dated June 6, 1995, regarding the dates for meetings to consider their application; (2) "Request for Board Approval of Charter Status", dated June 12, 1995; (3) minutes from a Board of Education Teaching/Learning Committee meeting, dated June 26, 1995, during which charter status was approved; (4) minutes from a special meeting of the Board of Education, dated June 26, 1995, during charter status was granted; (5) DPI "Charter School Subgrants Application", (6) "Board of Education Questions and Answers Regarding Affiliated Alternatives for Charter Status" dated June 13, 1995; and (7) "Petition and Agreement", dated January 1, 1998.

Originally, Affiliated Alternatives charter status was the umbrella for four distinct programs: Accelerated learning Academy (ALA), the Work and Learning Center (WLC), the Clustered Homebound Program (Cluster), and Community based alternatives [sic] (CBA). (Note: While CBA is part of the original request there is no mention of it in the petition.) The "Petition and Agreement" sought to amend the original charter to include School-Within-A School (SWS), the High School Equivalency Program (HSED), and the School Age Parent Program (SAPAR). Both documents detail the requirements enumerated in 118.40 of the state statute.

There are additional terms that address "different practices." These practices are related to either DPI or MMSD issues and are identical in all substantive respects in both the original request and the petition. In regard to the DPI, Affiliated Alternatives is to be exempt from the requirements of ss115-121 except as included in the charter school law. In practice the teachers will hold teaching licenses or charter school teaching licenses. Additionally, credits may be granted based on proficiency rather than hours of instruction and graduation requirements may be based on competency and performance rather than Carnegie units. In regard to MMSD, Affiliated Alternatives teachers will retain their rights with MMSD. MMSD will provide adequate space to the charter school, and if the space is located in a school the charter school will have access to the other services in the building such as the library and the computer center. MMSD secondary schools will honor Affiliated Alternative credits, and Affiliated Alternative students will retain their MMSD rights, including transfer and/or attendance on a part-time basis at their home school. Finally, the charter school's program evaluation will be based on multiple sources of data, including student progress.

The "Board of Education Questions..." explains what the charter status would allow that is different from a non-charter school. It also notes the exemption from the

DPI guidelines regarding staffing. Of particular note is the response to the question about how charter status will improve educational delivery of alternative programs: “No change in current delivery.”

The subgrant proposal requests funds to align the curriculum, instruction, and assessment of ALA, WLC, and Cluster with the new district standards. The proposal details expected outcomes in the areas of achievement, participation, and attitude/climate. The specifics are different for each program. The proposal also describes the research bases for the programs.

Academic Accountability in the Documents of Charter Schools

According to Molnar (1999), the literature on charter school reform suggests six elements of accountability associated with academic outcomes. Framed as questions, the presence of these elements in the documents provided by the schools is a basis to assess the charter schools studied.

Academic Accountability Question 1: Do the academic accountability aspects of the charter focus on ends not means?

Spruce School

There is minimal evidence that the accountability aspects focus on ends not means at Spruce School. The “Oconto Falls School District Spruce Charter School Presentation 9-22-98” states that the curriculum is “continuous progress” and that students progress “as they master content” (p. 2). The charter states that all state mandated tests as well as portfolios will be used to measure pupil progress.

Core Knowledge Charter School

There is some indication in the documents that there is a focus on ends and not means. The contract contains a section entitled “Expected Student Results.” Mastery of foundation skills is stated as a goal. Within the contract section entitled “Assessment and Accountability” is the provision that students will be pre-tested in order to provide a baseline for annual standardized tests to be selected by the school. In addition students will take the state mandated tests. The contract also provides that students will receive report cards at least three times a year and that the design of the card will show a student’s progress toward meeting the goals of the school’s curriculum. The school employs a curriculum called Core Knowledge Sequence. The bases for the curriculum are direct instruction, research based methods and materials, a “solid knowledge base” with academically challenging content, and good conduct (p. 9). Students will build a substantial knowledge base, develop their thinking and communication processes, be able to apply their knowledge and processes, and be able to communicate accurately and precisely. Appendix A of the contract contains a possible scope and sequence for all grades in the areas of reading, math, written expression, history, geography, science, music, art, physical education, and computer skills. The 1999-2000 Annual Report is a

comprehensive report that includes detailed group test score results. The contract provides that this annual report as well as a five-year report must be presented to the Board.

Paideia Academy

A focus on ends exists to some degree. The “Paideia Academy Proposal” states that the “Content Standards of the Kenosha Unified School District” will be the basis of the curriculum. Students will be evaluated in accordance with their own competencies and not solely in comparison to other students. Students will take all state and district standardized tests and “will be expected to demonstrate competency....” (p. 16). In addition to the testing, students will be evaluated using on going portfolios containing examples of a variety of their work. The “Paideia Charter School Contract” contains virtually the same language and states specifically that there are benchmarks for student achievement that have been established. Attached to the contract as an appendix is a chart showing the annual performance goals for the school. The “Statistics 98/99 School Year” includes a chart showing the percent of 8th grade students above grade level on the WSAS test compared to both other schools in the district and the goal that was set for the school. There is a similar chart showing comparisons to national percentiles for grades 6 and 7. The 1999-2000 data is contained in a letter to the parents.

Highland Community School

The contract does focus on ends. The current contract specifies that the school is to conform to the same district accountability measures and use the same district-wide assessments and proficiency measures as MPS schools that are not charter, unless authorized to do something different. If the school opts for an alternative plan to assess student achievement, the standards must be measurable and the results must “indicate if a pupil Meets or Does Not Meet the standard(s)” (p. 4). The school is required to define performance goals and methods used to determine pupil growth. A method for establishing baseline data against which student progress can be measured is required. In the initial year of the contract, standardized tests are required at each grade level at both the beginning and the end of the year. In subsequent years, standardized tests must be administered annually. Test scores must be reported both by class, disaggregated by gender, ethnicity, and economic status, as well as by individual scores showing the progress of each student. The school is required to meet five of six criteria in order to be considered to have made sufficient progress toward meeting the established educational goals. Included in the criteria is that the school must meet or exceed the percentage of students scoring at the basic, proficient, or higher levels at non-charter MPS schools. Also included is that students maintain or show improvement on the charter-determined measures, standards, and goals. Additionally, 80% must show a minimum gain of one grade level in math and reading, and a majority of the students who are below grade level must demonstrate a gain of more than one grade level. A greater percentage of students in grades 5-8 must receive a passing grade in at least four core area subjects than those students who achieve a passing grade in non-charter MPS schools. The school must also show a higher graduation rate than non-charter MPS schools.

Affiliated Alternatives

The documents show a focus on ends and not means. The “Request for Approval of Charter Status” details expected outcomes in three areas, “Participation,” “Achievement,” and “Attitude/Climate” for each of the programs. The students at the Work and Learning Center are expected to achieve 85% attendance. One hundred percent of the graduates are expected to demonstrate the attitudes and skills necessary to obtain and hold a job. While not all are as specific, there are similar goals for each of the other programs. For example, students at the Accelerated Learning Academy will have baseline for attendance based on the previous year and will be expected to have improved attendance. Cluster students will be expected to have 60% attendance. Similarly, ALA students will show “significant gains (.05 level) in reading and mathematics” (p. 5) and Cluster students will be expected to accrue .75 credits per quarter (p. 5). The “Charter School Subgrant Application” calls for the students at Affiliated Alternatives to “meet or exceed Madison school district academic standards” (p. 8). The “Petition and Agreement” retains specifics that focus on ends not means. During the period 1997-99, Affiliated Alternatives was to implement 18 standards across various classes. The stated goal is that students will attain minimal performance levels in at least 75% of the standards attempted. Additionally, at least 50% of those enrolled in the High School Equivalency Program will attain a High School Equivalency Diploma (p. 7).

Academic Accountability Question 2: Do the academic accountability aspects of the charter define and make clear the role of the sponsor?

Spruce School

There is very minimal evidence concerning the role of the sponsor in the documents of Spruce School. The “Oconto Falls School District Spruce Charter School Presentation 9-22-98” states that “The School Board plays an active role in this school community” (p. 3), but no specifics are included. The contract is signed by the board president and does require that “A year-end report will be developed...and presented to the Oconto Falls Area School Board” (p. 5).

Core Knowledge Charter School

There is minimal provision in the contract for the sponsor to have a role in the academic accountability for the school. According to the contract, the role of school board, which is the charter sponsor, “is defined by law to be that of an oversight body...no change in this relationship is anticipated” (p. 7). None changes were recommended in the Annual Report. As part of the contract the board is to receive annual and five-year reports to be presented in a comparative format. The contract does provide that the comparable data will be available to the school board.

Paideia Academy

The Kenosha Unified School District is the charter school's sponsor. The contract contains minimal language related to the role of the sponsor. The sponsor does have the right to terminate the contract if the contract has been violated. It also can terminate the contract if students do not make sufficient progress under ss118.01. The sponsor can honor a request to allow more time to the school to perform satisfactorily, but its decision in this matter is final.

Highland Community School

The contract contains a significant monitoring and oversight role for the sponsor. The school must notify the sponsor if it changes its methods of instruction, and the sponsor then can renegotiate or terminate the contract. The school must submit an audit that attests to the "accuracy, validity, and reasonableness of academic achievement... results reported by the Charter School..." The sponsor can terminate the contract based on the audit results (p. 12). Additionally, the sponsor has the right to review the records of the school at any time. The school is also required to supply any information and reports that the sponsor may request. Finally, the sponsor may hold the school to any representations or assurances it put forth in its proposal, whether they are in the contract or not.

Affiliated Alternatives

Affiliated Alternatives is an instrumentality of the Madison Metropolitan School District. There is nothing in the documents to indicate an active role for the sponsor with the school in regard to academic accountability. Oversight is the responsibility of an assistant superintendent and, other than a report to the board committee and the school board at the time of renewal, there is no indication of any role. Whatever role that is described is largely limited to funding, facility, and relationship to other MMSD schools and the rights of students in regard to those schools.

Academic Accountability Question 3: Do the academic accountability aspects of the charter result in accountability agreements between the charter school and the sponsor that are specific and precise?

Spruce School

Within the documents there are no performance standards set forth that must be met. The contract does specify that the curriculum will "complement the State Standards of Curriculum." It also specifies that the fourth grade WSAS and the third grade reading test will be used. For the first and second graders it states that achievement "will be assessed by the student performance and teacher assessments through the daily curriculum outlines following State Standards" (p. 2). An attachment to the "Oconto Falls School District Spruce Charter School Presentation 9-22-98" taken from "How to

Manage Your Multi-Age Classroom” states that authentic assessment strategies and standardized tests are part of the instructional strategies (n.p.).

Core Knowledge Charter School

Generally there are no standards specified in the documents that must be met. Nonetheless, the methods by which pupil progress is to be measured are detailed in the contract. The contract calls for students to be pre- and post-tested in order to establish baseline data and measure progress. The instrument to be used is norm referenced. Although not specified, the kinds of tests to be considered are the Iowa test of Basic Skills (ITBS), Comprehensive Test of Basic Skills, Stanford Achievement Test, and the California Achievement Test. In addition, students will take the state mandated tests. The contract does specify that “The relationship of emerging district standards, and their assessment, to CKCS will be determined by the board of education in conjunction with the governing body of CKCS” (p. 4). The Annual Report concludes that the “academic achievement of CKCS is excellent” (p. 12).

Paideia Academy

Although there are specific goals set forth for the school, there are no real performance standards included. The basis for the curriculum, the method of attaining educational goals and the methods for measuring student progress are all contained in the contract. The bases for the curriculum are the standards established by the school district. The methods to attain the educational goals include the Paideia Program of Instruction, which incorporates didactic instruction, coaching techniques, seminars. Students’ progress will be measured using ITBS and the WSAS. Benchmarks for performance are established by the district. The contract states, “The academy’s goals include achieving the benchmarks to the greatest degree possible” (n.p.).

Highland Community School

Within the contract there are no standards of performance that must be met. The performance language, as noted above, is written more as goals, albeit the failure to meet the goals can be considered as a contract violation. The only specific agreement is that the sponsor can renegotiate or terminate the contract if it so chooses, based upon the performance goals.

Affiliated Alternatives

There is some evidence of specificity in the documents. The programs operate from the philosophy described in the literature on “accelerated learning” and “authentic learning” which utilizes higher order thinking rather than remediation. The “Charter School Subgrant Application” calls for “authentic assessment” as part of the philosophical bases. The document does state that students will meet or exceed district academic standards and that the school will develop strategies for assessing student progress in higher-order thinking skills. Traditional tests will also be used in a pre-and-

post-manner as a measure of progress as part of the goal to use assessment as a “front-end tool...rather than just an after-the-fact estimate of what students learned” (p. 8). The “Petition and Agreement” states that between the years 1997 and 1999 18 standards will be established, but these relate to overall student performance and are not standards for the school. The “Request for Board Approval of Charter Status,” and the “Petition and Agreement,” while they do contain specific objectives, do not include any performance standards that would be used to determine the success or failure of the school.

Academic Accountability Question 4: Do the accountability aspects of the charter identify the sponsor’s responsibility for insuring the academic performance of the school and for sanctioning the school if it fails to meet agreed-upon academic standards?

Spruce School

The Oconto Falls Area School Board is the chartering entity. The contract, in the section on governance and parental involvement, states that the governance will be the under the control of the Spruce Charter Advisory Committee. Attendance of the superintendent and a school board member at the meetings is optional. Although the contract provides for annual extensions, unless one or both of the parties desire to terminate the contract, there are no standards or reasons specified as to why termination might occur. The renewal request, dated August 9, 1999, in addition to making the request, only explains the activities of the previous year and how the school will be different in the following year in regard to organization.

Core Knowledge

The documents do not address this question.

Paideia Academy

The contract does not articulate the sponsor’s responsibility for insuring the academic performance of the school. It does, however, give the sponsor complete authority to terminate the contract if it determines that students are not making sufficient academic progress under ss118.01.

Highland Community School

The contract specifies that the contract can be terminated if the students fail to make sufficient academic progress as determined by the School Board under ss118.01. If the sponsor does not immediately exercise its right to terminate the contract, that is not considered an amendment to the contract or a waiver of the right to terminate the contract at a later date.

Affiliated Alternatives

There is nothing in the documents that addresses this question directly. The “Request for Board Approval of Charter Status” and the “Petition and Agreement” do state that the program will be evaluated using multiple sources of data and comparing student attainment at the time of entry with attainment after time in the school. However, there are no indications of sponsor responsibility for the outcomes nor any suggestion of sanctions or potential sanctions to be applied.

Academic Accountability Question 5: Do the academic accountability aspects of the charter insure that data about the school’s performance be publicly available from the sponsor and disseminated according to a plan?

Spruce School

The contract provides that the Spruce Charter Advisory Committee prepare an annual report to be presented to the Oconto Falls Area School Board. The contract does not specify what is to be included in the report. The “Charter Renewal Request” contains no academic accountability data, nor is there any indication that the report is disseminated to anyone other than the Board members. None of the Charter Advisory Committee reports or the Spruce Partners in Education reports provided contain any academic accountability data.

Core Knowledge Charter School

The contract addresses this question in a number of ways. Parents receive report cards that show student progress toward goals. They also are to have the opportunity to attend conferences that include samples of student work and are to receive the results of standardized tests taken each year. CKCS is also required to provide the board with an annual report. The contract affirms that community involvement will be sought in the governance and operation of CKCS.

An amendment to the contract, dated October 7, 1996, that speaks to the relationship between the CKCS and PASS (Parents Advocating Student Success) details a somewhat different aspect to the question. PASS is a group of volunteers that sought to have the charter school established in the school district. The agreement states that quantitative research, except for action research, is not to be shared in any formal manner by PASS. After three years, the quantitative research and any other research conducted that conforms to Verona School Policy can be shared a formal manner.

Paideia Academy

The documents contain no specific language to address this characteristic. The only reference that applies to availability of data is in the contract, which states, “All records of the Paideia Academy shall be made available to and be made part of the records of the

Kenosha Unified School District” (n.p.). Test results as well as the goals for the school have been disseminated but not in any formally determined way.

Highland Community School

The contract requires the school to report all performance data to the MPS Division of Research and Assessment, but there is no requirement to establish a plan for disseminating performance data. The governance structure of the charter establishes a Board of Trustees comprised of citizens and representatives of the business, corporate, and non-profit community. One of the functions of the Trustees is to act in an advisory capacity to the charter school; however, there is no specific responsibility to make data available or to disseminate it.

Affiliated Alternatives

The only specific reference in any of the documents provided is in the “Charter School Subgrant Application,” which states that MMSD will provide both the DPI and the U.S. Department of Education a written evaluation of the program as a result of the grant. Any other plan or opportunity for dissemination about the school would be the result of a report to the Board, an example of which was provided as a document. There is, however, nothing in the documents that assures that there will be reports to the Board.

Academic Accountability Question 6: Do the academic accountability aspects of the charter provide a means by which the charter school can be used as a model for broader school reform?

Spruce School

The charter school as a model for reform is not addressed in the documents. However, the “Oconto Falls School District Spruce Charter School Presentation 9-22-98” does state that “the community is part of the educational process, dealing with brainstorming, planning and implementation of key educational concepts...” (p. 1). The contract states that the charter school works collaboratively with parents and the community in curriculum planning. Additionally, the frequent use of outside speakers, guests, and community resources probably provides greater awareness of the school than might otherwise be expected on the documents.

Core Knowledge Charter School

None of the documents establishes as a purpose for the charter school to become a model for broader school reform nor is the possibility addressed in the documents. However, the research issue addressed and discussed in the previous questions suggests some potential that the school could be used as a model.

Paideia Academy

The charter school as a model for reform is not addressed in the documents.

Highland Community School

The charter school as a model for reform is not addressed in the documents.

Affiliated Alternatives

The charter school as a model for reform is not addressed directly in any of the documents. The only reference that might suggest a means to use the charter school as a model is contained in the “Charter School Subgrant Application.” The application states the MMSD agrees to provide information related to the proposal the U.S. Department of Education and the DPI and to cooperate with both agencies by providing evaluations and any other forms sought by the agencies.

Contract Accountability Analysis Summary

The documents provided and examined in this evaluation show a broad range of attention in regard to the academic accountability characteristics put forth in the literature. While there is some attention, for example, to a focus on ends rather than means, there is, for the most part, a noticeable absence of comprehensive academic standards against which the performance can be measured. Affiliated Alternatives comes closest to establishing a standard. As well as establishing goals for students, the documents assert that Affiliated Alternatives’ students will meet or exceed Madison school district academic standards. Highland’s documents, too, have some reference to performance. Eighty per cent of the students, for example, must show a minimum grade-level gain in reading and math, and a majority of those below grade level must show more than one year of growth. Additionally, the school is to have a higher graduation rate than MPS. The documents of CKCS, Paideia, and Spruce generally speak only to goals, although performance of students at Paideia is compared to pre-established goals and other Kenosha schools. Overall, however, performance standards are neither explicit nor prominent in the documents.

The role of the sponsor ranges from significant oversight and monitoring to no role at all. In a monitoring and oversight capacity, Highland’s sponsor can terminate the charter on the basis of required performance audits that certify student achievement. Additionally, the sponsor can review records and demand information and reports. The Spruce charter asserts that the board plays an active role in the community, but no specifics are present. The Paideia contract simply gives the sponsor the right to terminate the contract for violations, and the CKCS contract simply states that the sponsor’s role is that provided in the law. There is no mention of a sponsor’s role in the Affiliated Alternatives documents. None of the charter documents prescribe an active role for the sponsor nor do they prescribe what level of academic performance would cause the

charter contract to be voided or cancelled. Highland's sponsor, however, can terminate or renegotiate if the school changes its method of instruction.

Although the documents for all the charter schools do include language on how academic achievement will be determined, there is an absence of language that gives the sponsor any responsibility for ensuring the academic performance of the school. The methods for determining academic achievement range from references to state-mandated tests, to use of pre- and post-testing, to use of portfolios, to use of "authentic assessment." Although the law provides the opportunity for sanctions to be applied, as in the failure of students to make sufficient progress under ss118.01, none of the documents states that sanctions will, in fact, occur. Highland and Paideia do make reference to ss118.01 as a reason to terminate, and Highland's sponsor reserves the right to use the statute at a later date if it is not immediately invoked. The documents for Affiliated Alternatives, CKCS, and Spruce do not make any references to circumstances for invoking sanctions.

None of the documents provided by the schools addresses the question of disseminating information about the charter school in any significant way. It is clear that there is no intent in the documents to provide assurances that performance will be disseminated other than in reports to the boards of education. It is not always clear, as in the case of Affiliated, that there will necessarily be reports to the board.

Each of the charters has a focus that employs a particular approach to the education of its students. None of the documents, however, indicates that any of the charter schools sees itself as a model for others to follow to promote broader innovation and improved student performance in all schools. The one exception may be CKCS, which has prepared a video that explains the history and current status of the school. While this may be seen primarily as a marketing instrument, it certainly can be useful as a means of promoting the particular approach to educating students as well as a model for organizing such a school.

Part III: Achievement Test Analysis

Design

To determine if there are any differences in academic achievement between charter schools and public non-charter schools, two-way ANOVAs were conducted using achievement test scores in reading, language arts, social studies, mathematics, and science for 3rd, 4th, 8th, and 10th grade as the dependent variables. The independent variables considered in the analyses were type of school (i.e., charter or non-charter), locale (i.e., large city, midsize city, small town), race, disability, SES, and sex. Table 7 lists each of the main effect independent variables considered in the analyses, as well as the associated levels. Each of the variables was defined by the state of Wisconsin. The table shows that students in large city charter schools were not found in 10th grade. Similarly, students in small town charter schools were not found in 3rd grade. Rather than including all interaction effects in the model, only the two-way interactions with each of these variables crossed with type of school (i.e., charter or non-charter) were considered.

The sample of charter school students was comprised of all students enrolled in a charter school that could be found in grade-level databases provided by the Department of Public Instruction (DPI). These charter schools, the number of students in each, and the grade levels tested are listed in Table 8. The databases used consist of the 1999 results of Wisconsin's mandated reading test (WRCT) in 3rd grade and mandated achievement tests (WKCE) in reading, language arts, math, science, and social studies in 4th, 8th, and 10th grade for all public school students in the state. There were 131 charter school students found in 3rd grade, 171 found in 4th grade, 800 found in 8th grade, and 95 found in 10th grade. In addition to test scores, the databases consist of demographic information, including information that identified the students' school. The sample of non-charter school students was chosen randomly from the remaining data in the databases to ensure an equal number of charter and non-charter school students. Randomly choosing non-charter school students also resulted in approximately the same number of non-charter school students as charter school students for each of the remaining independent variables. Therefore, it was not necessary to use a stratified random sampling plan to choose non-charter school students.

Results

Since the objective of this research was to determine the effect of charter schools, only significant main effects and interaction effects that pertain to type of school are discussed. Other main effect differences were found to be significant in many instances, however this was hypothesized a priori and was the reason for including the selected demographic variables in the ANOVA model. Including these variables as main effects in the model controls for differences that exist because of differences in the demographic variables.

Table 9 is the ANOVA table associated with the 3rd grade analysis. In 3rd grade, where only the subject of reading is tested, there were not enough charter school students

to warrant conducting the analyses by locale. Therefore, this analysis was conducted without this main effect. As the table illustrates, no statistically significant interactions were found between type of school and any of the demographic variables considered. However, a main effect was found between the two types of schools, with charter school students ($n = 130$) performing better than non-charter school students ($n = 124$). The mean reading scale score for each of these groups of students was 15.45 and 14.62 respectively.

Table 10 is the ANOVA table associated with all of the 4th grade analyses conducted. As the table illustrates, there were no significant differences between the two types of schools. The only statistically significant interaction found was between type of school and locale, and this interaction effect was significant for all subjects. Figures 1 – 4 illustrate this interaction effect for the subjects of reading, language arts, mathematics, and science. The interaction effect for social studies was comparable to that observed in reading and so is not presented.

As the figures illustrate, for all subject areas 4th grade students in large city non-charter schools outperformed their charter school counterparts, and this is the largest difference observed in all cases. However, in the large city samples, there were only 13 charter and 14 non-charter schools. The reverse was observed in midsize cities, with charter school students in this locale ($n = 103$) outperforming non-charter school students ($n = 96$). In small towns, the results are mixed. In the areas of reading and social studies, there is little difference between the performance of charter ($n = 44$) and non-charter ($n = 52$) students in small towns. Charter school students in small towns perform slightly better than non-charter school students in mathematics, while in science the reverse effect was observed.

Table 11 is the ANOVA table associated with all of the 8th grade analyses conducted. Once again, only significant effects related to type of school will be discussed. A statistically significant interaction was found between type of school and race for all subjects tested except mathematics. In all cases, minority students in charter schools ($n = 355$) performed significantly better than minority students in non-charter schools ($n = 391$). On the other hand, whites enrolled in charter schools ($n = 355$) performed either the same or worse than their counterparts in non-charter schools ($n = 391$). Table 12 displays the mean scale test scores for minority and white students in both charter and non-charter schools.

At the 8th grade level, a statistically significant interaction was found between type of school and disability in the areas of language arts and science. For these two subject areas, disabled students in charter schools outperformed disabled students in non-charter schools while non-disabled students in charter schools performed the same or slightly better than those in non-charter schools. In language arts, the mean scale score for disabled charter school students was 649.69 ($n = 68$), while the mean scale score for disabled students in non-charter schools was 636.09 ($n = 66$). The mean scale score for non-disabled students enrolled in a charter school was 679.53 ($n = 515$), while the mean scale score for non-disabled students enrolled in non-charter schools was 674.16 ($n =$

533). On the other hand, in science 8th graders tended to perform better in charter schools, regardless of disability status. In 8th grade, the average science scale score for disabled students in charter and non-charter schools was 663.49 and 654.08 respectively; the average science scale score for non-disabled students in charter and non-charter schools was 688.06 and 685.22 respectively.

A significant interaction effect was also observed for 8th graders in mathematics and science between type of school and locale. The effect is quite different from that observed in 4th grade. The interaction effects for mathematics and science are illustrated in Figures 5 and 6, respectively. As the figures demonstrate, 8th grade students in large city charter schools (n = 459) performed better than their non-charter school counterparts (n = 468); charter school students in midsize cities (n = 112) performed worse than those in non-charter schools (n = 103). Similarly, in small towns charter school students performed worse than non-charter school students. However, the small town samples contained only 12 and 24 charter and non-charter students respectively.

Finally, a statistically significant interaction was found for 8th graders between type of school and SES in social studies. Economically disadvantaged students enrolled in charter schools (n = 346) scored significantly higher than those enrolled in non-charter schools (n = 324). Students not at an economic disadvantage and enrolled at charter schools (n = 230) scored the same or slightly higher than their non-charter counterparts (n = 269). The mean social studies scale scores for economically disadvantaged students in charter and non-charter schools were 670.74 and 663.88, respectively, while those for non-economically disadvantaged students in charter and non-charter schools were 688.56 and 683.24 respectively.

Table 13 is the ANOVA table associated with all of the 10th grade analyses conducted. A statistically significant interaction was found between type of school and disability for all subject areas tested except social studies. Disabled students in charter schools performed either the same as or better than disabled students in non-charter schools. However, there were only 11 and 8 disabled students in non-charter and charter schools respectively. Non-disabled students in non-charter and charter schools numbered 118 and 107 respectively. In all cases, non-disabled students in charter schools performed significantly worse than their counterparts in non-charter schools. Table 14 depicts the mean scale scores for disabled and non-disabled students in both non-charter and charter schools.

In summary, analysis of achievement test results reveal the following:

1. At the 3rd grade level, charter school students outperform non-charter school students overall.
2. At the 4th grade level, there are no significant differences between charter and non-charter school students overall, but differences, albeit inconsistent, were found in relation to school location.
3. At the 8th grade level, charter school students outperform non-charter school students in reading and language arts, but not in mathematics, science, and

social studies. Also, differences were found in school location and race but only in relationship to specific subjects.

4. At the 10th grade level, there are no significant differences between charter and non-charter school students overall, but differences were found in relation to disability. Charter schools were found to be more effective with disabled students.

Discussion

Do charter school students outperform public non-charter school students? Overall, these analyses resulted in findings of statistically significant differences that are so scattered and inconsistent that it would be difficult to justify any strong conclusions. Findings that have yielded no consistent correlations among low-SES students, urban students, and minority students--groups that greatly overlap and could be expected to confirm one another--provide scant bases for explanation or prediction. In the majority of these analyses, students in charter schools performed as well as or better than students in non-charter public schools on the state standardized tests. But this finding is meaningless without knowing whether the differences can be attributed to students' levels upon entering the schools or student growth while attending the schools.

One can only speculate about the reasons for particular findings. In 3rd grade, for instance, students in charter schools outperformed students in non-charter schools in reading, the only subject tested. A speculative explanation for this difference is the possibility that parents of better 9-year-old readers have tended to choose to place their children in charter schools. This speculation seems to gain credence from the fact that among 4th graders from midsize cities, where most of the charter schools with 4th grades were found, charter students tended to outperform their non-charter counterparts. Perhaps the parents of higher achieving 9- and 10-year-old students have tended to choose charter schools.

Only a rather small minority of charter school students at the middle school level are attending programs dedicated to serving students at risk of dropping out of school. One could speculate on that basis that the scores of 8th graders in charter schools might be higher than their counterparts in non-charter public schools. Indeed, 8th grade minority students in charter schools tended to outperform minority students in non-charter schools. But 8th grade white students in charter schools tended to perform the same as or worse than their non-charter school counterparts.

In the upper grades, more charter schools than in the elementary and middle grades are dedicated to serving at-risk students. Hence, it might be hypothesized that in those grades charter school students would have significantly lower test scores. But the results of 10th grade testing do not confirm this hypothesis. Another 10th grade finding was that disabled students in charter schools generally outperformed disabled students in non-charter schools, while non-disabled students tended to do better in non-charter schools. This finding suggests that disabled 10th graders are being better served in charter schools, while non-disabled 10th graders are not. But this hypothesis is confounded by the fact

that an unknown proportion of at-risk 10th graders did not take the test because their programs are less academically oriented.

At this point, the statistical comparison of charter and non-charter school test scores provides no firm basis for conclusions about the ability of charter schools to increase student achievement. Even if the above speculations were strong, without examining individual students' scores, or at least aggregate scores, from year to year, it is not possible to know whether the differences in test results are due to achievement levels attained prior to entering the charter school or while attending the charter school.

Annual statewide administration of the WKCE does not occur in consecutive grades. But the testing is likely to continue as it is presently done. With the tendency toward an increasing number of students enrolling in charter schools each year, statistical findings of increased significance may emerge. Hence, continued yearly analysis of test scores is recommended. To facilitate this line of research, it is recommended that the DPI make minor modifications to its statewide test database of the aggregate scores of schools by: (a) identifying charter schools; and (b) in instances of charter schools existing within regular public schools, separating the scores of the charter school students from those of the other students.

Table 7
Main Effect Variables and Associated Levels Considered in the Analyses

Main Effect Variable	Number of Levels	Meaning of Levels
School Type	2	Charter vs. Non-Charter
Race	2	White vs. Minority
Locale	3	Large City vs. Midsize City vs. Small Town
Disability	2	Disabled vs. Non-Disabled
SES	2	Economically Disadvantaged vs. Not Economically Disadvantaged
Sex	2	Male vs. Female

Table 8
Charter Schools Used in the Analyses

Grade	School	Number of Students
3 rd	The Brompton School	16
	Classical Charter School	24
	Core Knowledge Charter School	40
	Coulee Montessori	6
	Highland Community School	7
	New Century School	21
	School of Technology & Arts	18
4 th	The Brompton School	16
	Chrysalis Family Charter School	2
	Classical Charter School	25
	Central City Cyberschool	8
	Core Knowledge Charter School	40
	Leadership Academy Charter School	3
	McKinley Center	53
	New Century School	4
	School of Technology & Arts	18
YWCA Global Career City Academy	8	
8 th	Beaver Dam Charter School	7
	Chrysalis Family Charter School	2
	Core Knowledge Charter School	20
	Gustav A. Fritsche Middle School	315
	Lancaster Academy	2
	Leadership Academy Charter School	9
	Paideia Charter School Academy	21
	School of Technology & Arts II	9
	Walker International Middle School	230
	Waupaca County Charter School	1
	Wright Middle School	60
10 th	Academic Center – High School	5
	Appleton Central Alternative School	7
	Beaver Dam Charter School	13
	Chrysalis Family Charter School	5
	Clark County Alternative Charter School	2
	Lancaster Academy	3
	Laurel High School	5
	Lucas Charter School	4
	Monroe Alternative Charter School	16
	Rock River Charter School	16
	SAPAR Program	10
	TEAMS	44
	Waupaca County Charter School	1

Table 9
ANOVA Results for 3rd Grade Reading Achievement Test Scores

Source	<u>df</u>	<u>F</u>
School Type	1	6.94**
Race	1	5.14
Disability	1	1.62
SES	1	4.80*
Sex	1	0.90
Race * School Type	1	2.03
Disability * School Type	1	1.92
SES * School Type	1	0.17
Sex * School Type	1	0.11

*p < 0.05 **p < 0.01.

Table 10
ANOVA Results for 4th Grade Achievement Test Scores

Source	<u>df</u>	<u>F</u>				
		Reading	Lang Arts	Math	Science	Social Studies
School Type	1	0.73	0.01	0.44	0.98	0.04
Locale	2	2.75	1.27	1.21	1.16	3.81*
Race	1	12.37**	3.36	9.51**	16.56**	9.67**
Disability	1	14.33**	11.40**	13.27**	4.89*	5.86*
SES	1	2.55	0.00	3.67	4.05*	9.95**
Sex	1	0.32	0.03	2.29	11.95**	4.59*
Locale * School Type	2	3.37*	4.33*	3.89*	4.11*	4.65*
Race * School Type	1	0.01	0.02	0.05	0.10	0.14
Disability * School Type	1	0.00	0.25	0.31	0.08	1.41
SES * School Type	1	0.01	2.30	0.04	0.01	0.15
Sex * School Type	1	1.78	1.12	1.28	0.13	0.93

*p < 0.05 **p < 0.01.

Table 11
ANOVA Results for 8th Grade Achievement Test Scores

Source	df	F				
		Reading	Lang Arts	Math	Science	Social Studies
School Type	1	0.80	0.97	0.00	0.15	0.05
Locale	2	3.73*	2.36	1.80	3.40*	6.66**
Race	1	99.30**	131.18**	133.60**	111.00**	88.15**
Disability	1	100.11**	111.91**	81.17**	106.25**	136.71**
SES	1	2.01	2.01	4.09*	4.97*	5.79*
Sex	1	10.06**	31.45**	2.73	10.83*	0.03
Locale * School Type	2	0.60	0.30	7.36**	3.90*	2.04
Race * School Type	1	8.55**	13.32**	3.34	4.37*	5.01*
Disability * School Type	1	2.70	4.43*	3.64	4.12*	3.15
SES * School Type	1	0.14	0.02	1.04	1.79	3.89*
Sex * School Type	1	1.40	2.24	0.12	0.54	0.88

*p < 0.05 **p < 0.01.

Table 12
8th Grade Mean Achievement Test Scores for Minority and White Students in Reading, Language Arts, Science, and Social Studies

	Reading		Language Arts		Science		Social Studies	
	Minority	White	Minority	White	Minority	White	Minority	White
Charter Schools	669.96	691.86	667.61	689.19	675.51	700.43	669.42	690.82
Non-Charter Schools	659.28	697.73	656.24	695.77	668.80	705.51	661.78	692.49

Table 13
ANOVA Results for 10th Grade Achievement Test Scores

Source	df	<u>F</u>				
		Reading	Lang Arts	Math	Science	Social Studies
School Type	1	0.30	0.05	1.04	0.02	0.53
Locale	2	1.35	0.29	0.26	0.13	0.17
Race	1	1.73	3.86	4.10*	6.79**	3.70
Disability	1	3.91*	1.37	3.87	5.34*	5.68*
SES	1	0.22	0.08	1.33	0.72	0.05
Sex	1	8.64**	12.44**	1.32	1.47	2.69
Locale * School Type	2	0.05	0.01	0.24	0.15	1.09
Race * School Type	1	0.71	0.05	0.08	0.46	0.00
Disability * School Type	1	5.23*	8.56**	6.88**	6.79**	1.93
SES * School Type	1	1.77	2.03	0.15	2.39	1.92
Sex * School Type	1	2.02	1.05	3.83	1.61	0.33

*p < 0.05 **p < 0.01.

Table 14
10th Grade Mean Achievement Test Scores for Disabled and Non-Disabled Students in Reading, Language Arts, Mathematics, and Science

	Reading		Language Arts		Mathematics		Science	
	Dis-abled	Non-Disabled	Dis-abled	Non-Disabled	Dis-abled	Non-Disabled	Dis-abled	Non-Disabled
Charter Schools	686.00	685.15	694.50	685.03	698.50	698.39	702.56	700.60
Non-Charter Schools	677.64	710.69	677.27	709.78	691.00	737.89	693.45	721.87

Figure 1. Interaction effect between type of school and locale for 4th grade reading achievement test scores.

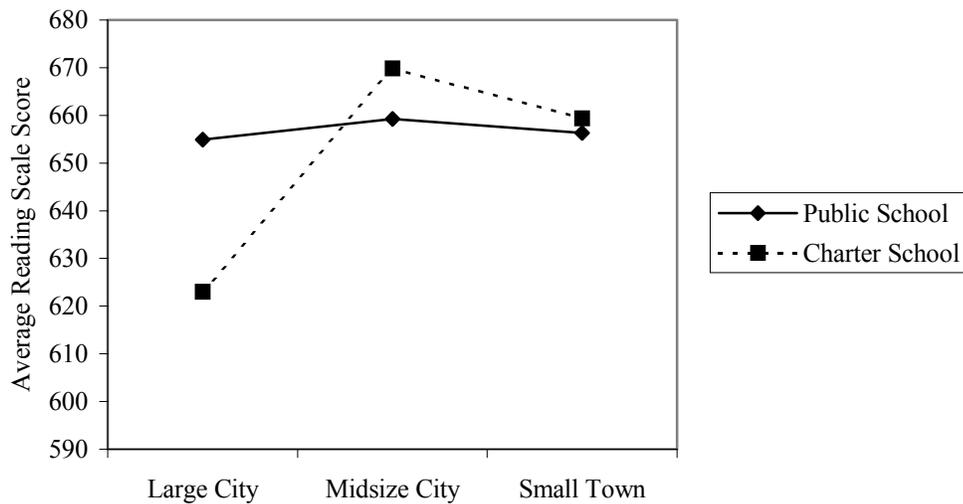


Figure 2. Interaction effect between type of school and locale for 4th grade language arts achievement test scores.

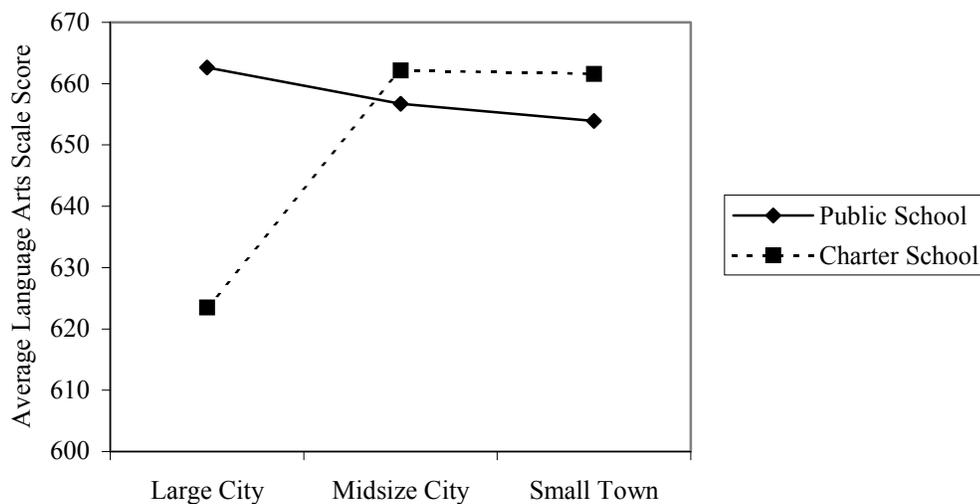


Figure 3. Interaction effect between type of school and locale for 4th grade mathematics achievement test scores.

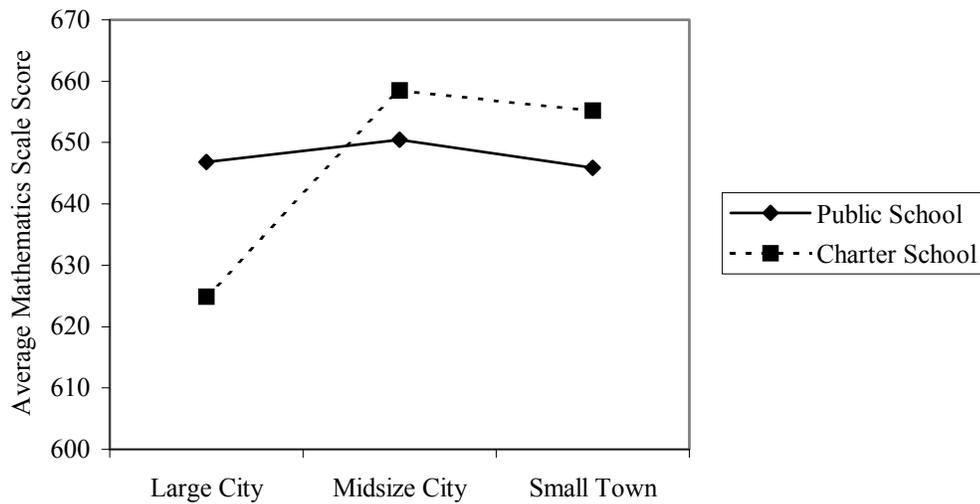


Figure 4. Interaction effect between type of school and locale for 4th grade science achievement test scores.

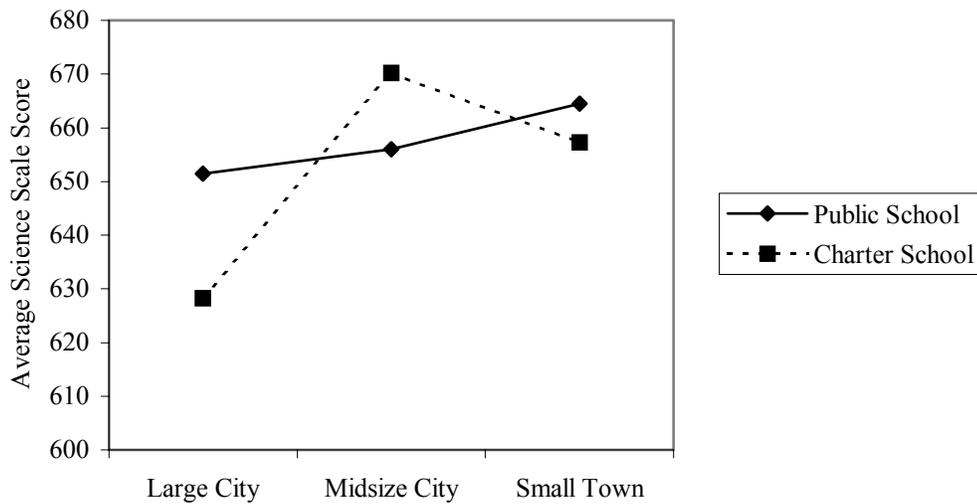


Figure 5. Interaction effect between type of school and locale for 8th grade mathematics achievement test scores.

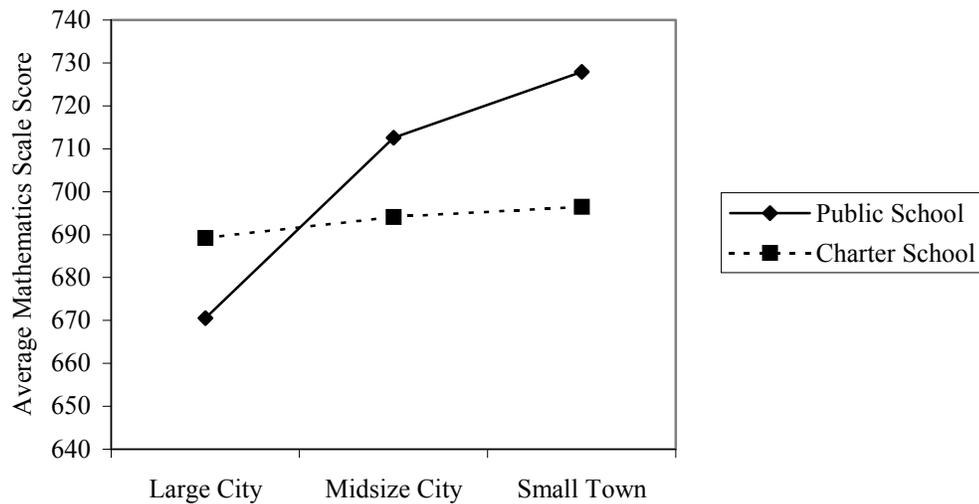
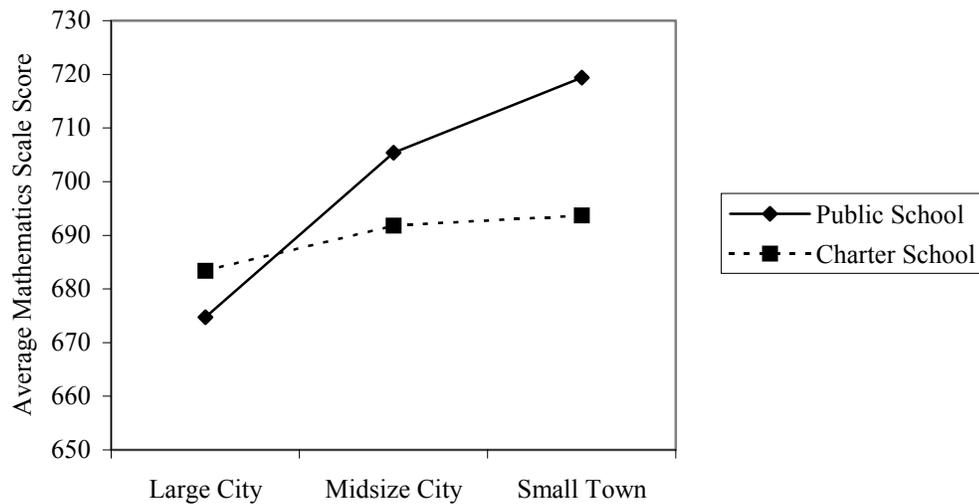


Figure 6. Interaction effect between type of school and locale for 8th grade science achievement test scores.



Conclusions

The results of the 2000-2001 evaluation of the charter schools in Wisconsin lead to several conclusions regarding the selected sample of five charter schools and the total population of charter schools in Wisconsin.

In regard to the innovative program and contract assessment policies of the five charter schools--Spruce, Core Knowledge, Paideia Academy, Highland, and Affiliated Alternatives--the following conclusions are warranted:

1. Supportable, cohesive educational programs have been planned and are being implemented.
2. The educational programs as planned and implemented are not innovative in the sense of being novel.
3. Education practices are similar to those found in non-charter schools in terms of types of assessments and total amount of assessment.
4. The schools have not had a demonstrable influence on non-charter schools in regard to serving as models for change.
5. Charter status may facilitate charter school development and implementation, but it is not essential to development and implementation of innovative programs.

In regard to student achievement in the total population of Wisconsin charter schools in comparison to a set of non-charter schools, despite some statistically significant differences between charter and non-charter school students in scores on state reading tests (3rd grade) and state achievement tests (4th, 8th, and 10th grades), there are no discernible patterns from which firm conclusions can be drawn.

Recommendations

The conclusions from the investigation of the five selected charter schools and the analysis of available test results from the broader population of charter schools in Wisconsin lead to the following set of recommendations for charter schools, charter school agencies, and DPI:

1. The charter schools should make greater use of the autonomy they have been given by their chartering agencies. They need to develop and implement more innovative programs that have the potential to serve as tested models of educational excellence that other schools can adopt. Unless the charter schools become experimental, their justification for existence will be eroded. Being experimental, being innovative, can take many forms in terms of educational programs. It can be curricula or instructional methods created by the charter school that have not been tried elsewhere, but it can also be a significant modification to an existing program. Programs such as direct instruction or the Paideia proposal which have been adjusted in major ways so that they meet the specific needs of the school's population, or the community's expectations

regarding content, can be considered innovations. For this type of innovation to occur, however, the charter school must specify precisely how the adopted program is being altered to fit the needs of the school. In addition, the change has to be of a more substantial nature than just aligning the program with district or state test requirements, although such an alignment change is important.

2. To justify the greater autonomy and the innovative program that the autonomy is to produce, the charter schools need more elaborate and systematic evaluation. The charter school would have a greater chance of serving as a model for change available to other schools if it employed a research mentality. A research design with clear objectives, a detailed data collection agenda, appropriate instrumentation, and identified data analysis procedures in place is necessary. The objectives, for example, must specify intended outcomes for students. These outcomes must have a clear relationship to the innovative program that has been installed, and they must be assessable. Random, isolated evaluation of various facets of the educational program can provide some information about program effects, but sufficient understanding of a program can only come from comprehensive longitudinal evaluation with instruments targeted to objectives, with variety in types of instruments or forms of data sought, with continual data collection throughout the year, and with data from a variety of informants. Evaluation needs to be valid and reliable if it is to produce educational programs that can serve as models for change. The “publishing” of findings, an obligation of all researchers, presently exists in some form in each of the five examined charter schools. However, when more innovative programs have been developed, tried, and tested, more deliberate and systematic methods of disseminating findings will be required.
3. To aid charter schools in their innovation-evaluation efforts, chartering agencies need to take their oversight role more seriously. They should issue charters only when intended programs are clearly innovative. They should monitor implementation of the programs and participate in the establishment of an evaluation schedule that requires progress and final reports at specified times. Finally, along with the school, they need to play a major role in publishing the successes and failures of the program.
4. Analyzing test data obtained from 3rd, 4th, 8th, and 10th grade state tests was difficult because test data were not available for all charter schools. In some districts, charter school test data are not segregated from the test data of the other schools in the district. In charter schools where only a few students at a grade level are tested, scores are not readily available in state reports. To develop a complete picture of student achievement in charter schools in the state, test data by school must be accessible. The success of the charter school program in Wisconsin can only be judged if test data are available and analyzed over time for all charter schools.

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Appendix A
Principal Questionnaire

CERAI

Charter School Evaluation

Principal Questionnaire

Please answer **every question** on this questionnaire. Please answer **as completely as you can**. Use the reverse side of the pages if you need additional space for your responses.

Please return the completed questionnaire in the attached envelope by _____.

1. Background Information:

School name: _____

Principal's name: _____

Grades served: _____

Student Enrollment:

Total enrollment: _____

Number of students of each ethnicity: Afr. Amer. _____ Asian _____
White _____ Native Am. _____
Hispanic _____ Other _____

Number of special education students enrolled: (If multiply disabled, include only the primary disability.)
LD _____ visually impaired _____
ED _____ hearing impaired _____
CD _____ orthop. impaired _____
other _____
Total _____

How many of the special education students are multiply disabled? _____

Teacher Certification:

Total number of faculty members: _____

Number of DPI licensed faculty: _____

Number of faculty with Charter School License: _____

Number of faculty with Charter School Permit: _____

2. Charter School Goals: What is your charter school trying to accomplish?

Describe the major overall student goals or intended student outcomes of your charter school.

Goal 1:

Goal 2:

Goal 3:

Goal 4:

3. Charter School Innovative Educational Program: How is your charter school trying to accomplish its goals?

3a. Does your charter school have an innovative curriculum (i.e., innovative content, subject matter, courses, programs, etc.)? Yes___ No___
If **yes**, please continue below. If **no**, skip to question 3b.

List your curriculum innovations. For each curriculum innovation:

- Describe it in detail.
- Discuss your justification--your reasons--for choosing each.
- Indicate its present level of implementation.

Curriculum innovation #1--description and justification:

Present level of implementation: (Circle one.)	Fully Implemented		Not Implemented
	1	2	3
			4

(3a. continues on next page)

3a. (continued)

Curriculum innovation #2--description and justification:

Present level of implementation: (Circle one.)	Fully Implemented 1	2	3	Not Implemented 4
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Curriculum innovation #3--description and justification:

Present level of implementation: (Circle one.)	Fully Implemented 1	2	3	Not Implemented 4
--	------------------------	---	---	----------------------

(3a. continues on next page)

3a. (continued)

Curriculum innovation #4--description and justification:

Present level of implementation: (Circle one.)	Fully Implemented 1	2	3	Not Implemented 4
--	------------------------	---	---	----------------------

3b. Does your charter school have innovative instruction (i.e., innovative teaching methods or techniques, innovative learning activities or experiences, etc.)?

Yes ___ No ___ If **yes**, please continue below. If **no**, skip to question 3c.

List your instructional innovations. For each instructional innovation:

- Describe it in detail.
- Discuss your justification--your reasons--for choosing each.
- Indicate its present level of implementation.

Instructional innovation #1--description and justification:

Present level of implementation: (Circle one.)	Fully Implemented 1	2	3	Not Implemented 4
--	------------------------	---	---	----------------------

(3b. continues on next page)

3b. (continued)

Instructional innovation #2--description and justification:

Present level of implementation: (Circle one.)	Fully Implemented 1	2	3	Not Implemented 4
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Instructional innovation #3--description and justification:

Present level of implementation: (Circle one.)	Fully Implemented 1	2	3	Not Implemented 4
--	------------------------	---	---	----------------------

(3b. continues on next page)

3b. (continued)

Instructional innovation #4--description and justification:

Present level of implementation: (Circle one.)	Fully Implemented 1	2	3	Not Implemented 4
--	------------------------	---	---	----------------------

3c. Does your charter school have other innovations (i.e., innovative student grouping, innovative educational materials or resources, innovative scheduling, etc)?
Yes ___ No ___ If **yes**, please continue below. If **no**, skip to question 4.

List your instructional innovations. For each instructional innovation:

- Describe it in detail.
- Discuss your justification--your reasons--for choosing each.
- Indicate its present level of implementation.

Other innovation #1--description and justification:

Present level of implementation: (Circle one.)	Fully Implemented 1	2	3	Not Implemented 4
--	------------------------	---	---	----------------------

(3c. continues on next page)

3c. (continued)

Other innovation #2--description and justification:

Present level of implementation: (Circle one.)	Fully Implemented 1	2	3	Not Implemented 4
--	------------------------	---	---	----------------------

Other innovation #3--description and justification:

Present level of implementation: (Circle one.)	Fully Implemented 1	2	3	Not Implemented 4
--	------------------------	---	---	----------------------

(3c. continues on next page)

3c. (continued)

Other innovation #4--description and justification:

Present level of implementation: (Circle one.)	Fully Implemented 1	2	3	Not Implemented 4
--	------------------------	---	---	----------------------

4. Charter School Evaluation. How is your charter school assessing its goals?

4a. Describe your school's overall assessment plan.

4b. For each goal listed on page 2, indicate the assessment method(s) being used and the extent to which the goal is being achieved.

Goal 1:

Method of assessment:

Extent achieved:	Achieved				Not Achieved
(Circle one.)	1	2	3		4

Goal 2:

Method of assessment:

Extent achieved:	Achieved				Not Achieved
(Circle one.)	1	2	3		4

Goal 3:

Method of assessment:

Extent achieved:	Achieved				Not Achieved
(Circle one.)	1	2	3		4

Goal 4:

Method of assessment:

Extent achieved:	Achieved				Not Achieved
(Circle one.)	1	2	3		4

5. Charter School Influence: To what extent has information about your charter school program and its effects been disseminated?

5a. List those aspects and effects of your charter school that have been shared with other schools.

For each aspect or effect:

- Name it. If you have not described it above, describe it here.
- Indicate with whom this information has been shared.
- Describe how this information has been shared.

Thank you for completing this questionnaire. We appreciate the time and effort required to answer the questions.

Please append any school documents that may clarify or extend any of your responses and help us to better understand you charter school. We will be contacting you to arrange a site visit to your school and to discuss your responses in person.

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Appendix B
Teacher Questionnaire

2. Charter School Goals: What is your charter school trying to accomplish?

Describe what you believe to be the major overall student goals or intended student outcomes of your charter school.

Goal 1:

To what extent do you agree with Goal 1? (Circle one.)

Strongly Agree	Agree	Disagree	Strongly Disagree
1	2	3	4

Goal 2:

To what extent do you agree with Goal 2? (Circle one.)

Strongly Agree	Agree	Disagree	Strongly Disagree
1	2	3	4

Goal 3:

To what extent do you agree with Goal 3? (Circle one.)

Strongly Agree	Agree	Disagree	Strongly Disagree
1	2	3	4

Goal 4:

To what extent do you agree with Goal 4? (Circle one.)

Strongly Agree	Agree	Disagree	Strongly Disagree
1	2	3	4

3. Charter School Innovative Educational Program: How are you trying to accomplish these goals?

3a. Does the curriculum (i.e., content, subject matter, concepts, etc.) in your classroom reflect the goals of your charter school identified above? If you answer **yes**, please provide three or four specific examples of your curriculum, and describe how each example reflects or incorporates one or more of those goals. If you answer **no**, skip to question 3b.

Yes? ___ No? ___

Example 1

Reflects/incorporates goal(s) # _____

Example 2

Reflects/incorporates goal(s) # _____

(3a. continues on next page)

3a. (continued)

Example 3

Reflects/incorporates goal(s) # _____

Example 4

Reflects/incorporates goal(s) # _____

3b. Do your instructional methods (i.e., teaching techniques, learning activities or experiences, etc.) in your classroom reflect the goals of your charter school identified above? If your answer is **yes**, please provide three or four specific examples of your instruction, and describe how each example reflects or incorporates one or more of those goals. If you answer **no**, skip to question 3c.

Yes? ___ No? ___

Example 1

Reflects/incorporates goal(s) # _____

Example 2

Reflects/incorporates goal(s) # _____

(3b. continues on next page)

3b. (continued)

Example 3

Reflects/incorporates goal(s) # _____

Example 4

Reflects/incorporates goal(s) # _____

3c. Do other aspects of your classroom (e.g., student grouping, scheduling, materials, resources, etc.) reflect the goals of your charter school identified above? If you answer **yes**, please provide three or four specific examples of other aspects of your classroom, and describe how each example reflects or incorporates one or more of those goals. If you answer **no**, skip to question 4.

Yes? ___ No? ___

Example 1

Reflects/incorporates goal(s) # _____

Example 2

Reflects/incorporates goal(s) # _____

(3c. continues on next page)

3c. (continued)

Example 3

Reflects/incorporates goal(s) # _____

Example 4

Reflects/incorporates goal(s) # _____

4. Charter School Evaluation: How are you assessing whether the charter school goals identified above are being achieved in your classroom?

4a. Describe your classroom assessment plan. Include:

- the methods you use to determine whether your goals or intended student outcomes are being achieved.
- the most important criteria you use to judge the extent or quality of a child's progress. In other words, what types of evidence (e.g., quantitative such as test performance or qualitative such as evidence of motivation) would you cite to verify that each goal is being achieved?

4b. Based on the methods and evidence in your assessment plan, describe the effects that the educational program you provide in your classroom is having on students.

5. Charter School Satisfaction

5a. Overall, how satisfied are you with your charter school? (Circle one.)

Very Satisfied	Satisfied	Unsatisfied	Very Unsatisfied
1	2	3	4

5b. What do you believe are the primary strengths of the charter school?

5c. What do you believe are the most important areas in which the charter school needs to improve?

Thank you for completing this questionnaire. We appreciate the effort and time required to answer the questions.

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