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Review of Two Presentations on the Portfolio School Model

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Summary of Review

Representatives from the Recovery School District (predominantly, New Orleans) and the Achievement School District (Memphis) have created detailed presentations concerning the successes and challenges of implementing portfolio models. A portfolio district contracts with various providers to run schools and is responsible for holding those providers accountable. Although no rigorous research has yet examined the effectiveness of portfolio governance structures, the presentations are aimed at encouraging their adoption. While one should not expect citation of specific studies in PowerPoint presentations, policymakers considering such reforms should not act without a comprehensive and nuanced discussion of relevant evidence. Moreover, while the presentations both include strong assertions of positive results, they should acknowledge the thin evidence base on portfolio governance and consider possible alternative explanations for those asserted results. Specifically, the reported achievement gains are suspect and may be attributable to other unexamined factors such as the massive out-migration of New Orleans students. The Memphis data are too limited in scope and time to be conclusive. The purported teacher and administrator human-capital improvements that are reported in both presentations are not specified. Finally, the influx of unexamined federal and philanthropic funds may underestimate true costs, and the implications for community relations are not well developed. In conclusion, the presentations fail to provide the research base needed for policymakers.

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Review of Two Presentations on the Portfolio School Model

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I. Introduction

The Metropolitan Milwaukee Association of Commerce recently hosted guest speakers Patrick Dobard, superintendent of the 10-year-old state-run Recovery School District (RSD) in Louisiana, which manages the majority of schools in New Orleans, and Elliot Smalley, chief of staff for Tennessee's state-run Achievement School District (ASD), which will oversee more than a dozen schools in Memphis this year. These leaders presented PowerPoint slides touting New Orleans'[1] and Memphis'[2] performance under state-takeover district laws as evidence that this reform should be scaled up to urban systems nationally. Yet both presentations make unwarranted claims about the effectiveness of their portfolio systems regarding student achievement, school-choice processes, and human capital. Whenever a portfolio system is being contemplated, a more sophisticated and evidence-based discussion of the costs and benefits is required.

Typically, a "state takeover" district answers to a state authority rather than a locally elected school board. In addition to the Tennessee ASD and Louisiana RSD, Michigan has created the Education Achievement Authority in Detroit. And as these two presentations indicate, the idea is spreading to urban districts across the country. While the exact definition of a portfolio model is fluid, at least 25 other urban districts are already beginning to follow the "portfolio" model.[3]

The theory behind a portfolio model is that the district can decentralize accountability and contract with a variety of charter operators or networks, which may offer different services at different schools.[4] According to Lake,[5] the theory is to "hedge bets" about schools in a district by combining a variety of strategies, from contracting with private charter-school operators to keeping some schools under direct district control. Advocates of portfolio models contend that such an approach challenges the dichotomy between government and markets. They claim that the solution involves both government *and* markets.[6] The characteristics of portfolio districts are varied, but tend to include school-based decision making; free movement of students, money, and educators within the district; and a general openness to new ideas, people, and organizations.[7]

Policy studies of portfolio districts have been limited. New Orleans has the longest reform history, with the establishment of RSD in 2003, prior to Hurricane Katrina, yet there has

been no definitive study of its effectiveness. Studies claiming that post-Katrina reforms have improved student performance have had methodological challenges,[8] and most analyses reported by the RSD and various reform organizations simply show trends without considering other causal factors for the rising average student achievement, such as student attrition, changed demographics, or disproportionate resources.[9] In Detroit, researchers have found that, under similar state takeovers, policies have focused on fiscal over academic accountability.[10]

II. Findings and Conclusions of the Presentations

Overall, the presentations accurately depict the strategies employed by these two "districts," but do not address whether such strategies are effective or efficient. Neither presentation offers a sophisticated discussion of the data nor the claims made. While the RSD's presentation does introduce some challenges of implementing the portfolio model and offers some caveats, there are unsubstantiated claims in both presentations. Furthermore, there are vital *unaddressed* issues, including how the reforms have been funded and how to interpret the remarkable overall growth in student achievement they present.

The major claims include the following:

Recovery School District

1. Remarkable student growth has occurred since these reforms have been implemented.
2. Parents have more choice in their schooling options.
3. The key to a successful portfolio model is closing down failing schools.
4. Human capital has improved under the portfolio model.

Achievement School District

1. The ASD will move the bottom 5% of schools to the top 25% by the year 2017.
2. The reforms have increased the percentage of students who are proficient or advanced in math and science, by 5.2% in each subject, from 2012–2013, and have cut expulsion rates in half.
3. The "great people" hired contributed to the success of the model.
4. Based on survey data, parents and teachers are satisfied with their schools.

III. The Presentations' Rationale for Their Findings and Conclusions

Across both reports, the rationales were either unsubstantiated causal claims based on general trends or were not supported. In the presentation on New Orleans, for example, a causal relationship was assumed between the portfolio model and student achievement, but the data did not control for changes in student-level characteristics or selection issues, which were likely in play. No evidence was given for "improving human capital" or how the human-capital changes led to positive outcomes.

The presentation on Memphis schools was more focused on the policies implemented, but it, too, relied on descriptive data on student achievement from two years (2012 and 2013), as well as survey data from parents and teachers. While talent and "great people" were highlighted, there was no explanation of what that meant or how (or whether) it was measured.

IV. The Presentations' Use of Research Literature

Given that these two documents are presentations, not official reports, there was not a systemic use of the literature, nor was one expected. However, it is reasonable to expect claims to be grounded in evidence and research. It is these claims that we examine.

V. Review of the Presentations' Methods

As described above, both items were presentations and thus did not explicitly discuss methods. The reports provided descriptive data on the reforms, what had been implemented, and the challenges faced, as well as aggregate data on student performance gains.

VI. Review of the Validity of the Findings and Conclusions

Presentation on the Recovery School District

Context

Before assessing the claims in the Power Point, it is important for readers to understand several contextual factors about New Orleans reforms since 2005.

First, the overall population of New Orleans has changed substantially since Katrina, thereby changing the student population as well. Census data show that not only has the

city become smaller since 2000, the disproportionate loss of black families and children has shifted the overall demographics of the city.[11] People who did not own homes or lived with friends and relatives were less likely to return to New Orleans after Katrina.[12] These shifts are important for understanding whether the rising achievement rates in New Orleans are due to the educational reforms or to a broader shift in the student population.

Second, the large amount of government and philanthropic dollars that seeded New Orleans charter schools sets the district apart from most other urban systems. A federal i3 grant alone brought in $33.6 million. Also, support from private foundations has been essential to expansion of the portfolio model, both in New Orleans and nationwide.[13] Private dollars have funded charter networks directly and helped to elect local and state-level board members supportive of such policies.[14] A 2009 report by Tulane's Cowen Institute estimated private contributions to range from $272 to $407 per pupil, on average, or about 3% of total revenues, though these figures were as much as 29% for particular charter networks. Furthermore, as Cowen states, these figures might be under-reported due to the lack of systematic notation in school budgets.[15]

Third, New Orleans's teaching force is very different from that of most urban systems. New Schools for New Orleans reported in 2012 that 30% of the city's teachers came from either Teach for America (TFA) or The New Teacher Project.[16] After the RSD took over a larger number of schools post-Katrina, the schools' 7,000 teachers were laid off and had to reapply for their jobs, thus creating a shift in the teaching workforce and weakening the local union.[17] No evidence is available on the positive and/or negative effects of this massive change.

Finally, researchers' access to New Orleans data has been uneven. While the state shared data with CREDO researchers, it has refused to release it to others such as Research on Reforms, who filed a lawsuit over the lack of equitable access to state data.[18] Thus, there is no independent scientific replication or evaluation of the report.

Examining the Claims about New Orleans Schools

In this section, we examine the authors' claims about the portfolio model's effects on student achievement in New Orleans, their assessment of the successes and challenges of the reforms, and their discussion of school closures, human capital, and community conflict.

Gains in Student Achievement

The presentation makes several claims about student achievement in New Orleans, including the assertion that RSD schools outpace the state, displaying a graph with impressive growth from 2007 to 2013, and that New Orleans is closing the achievement gap. A greater percentage of African American students in New Orleans are proficient on state high-stakes tests than their peers across the state. However, whether these reported gains are due to the portfolio model or to demographic changes in the city overall is unclear. Researchers such as Gumus-Dawes et al. contend that the modest performance

advantages seen in the New Orleans community may be the result of student selection.19 Therefore, while the audience is led to assume that the improvements are due to the portfolio related educational reforms post-Katrina, it is not possible to make causal claims with these data.

Previous studies of New Orleans reforms have been limited. One often-cited report was conducted by CREDO in 2013. As stated in a recent Think Tank Review by Andrew Maul and Abby McClelland of a national CREDO study that used the same Virtual Control Record (VCR) strategy, the gains claimed in the CREDO study of New Orleans charters rest on questionable methods.[20] Maul and McClelland question the authors' methodological decisions, including the choice to use VCR when propensity-score matching is a more accepted method for making causal inferences.[21] Furthermore, McClelland noted in a follow-up statement that the effect sizes in New Orleans were very small regardless, with only one half of one percent of the variation in test scores explained by attending a New Orleans charter school.[22]

Research on Reforms also states that gifted and talented students were not separated out from the overall "special education" category, which includes students with severe disabilities.[23] This may, they argue, account for some of the claimed growth for special education students. Additionally, there are allegations by the Friends and Families of Louisiana's Incarcerated Children that many students were "pushed out" of RSD charters and into the RSD direct-run schools.[24]

Thus there are stark differences of opinion about the performance of New Orleans charter schools and about the way it is measured.

Furthermore, despite overall achievement score growth trends in New Orleans, it is important to note that over half of the schools are still failing. In 2012–2013, 35% of schools in New Orleans received a letter grade F, while another 22% received a D, and 13% were not given a letter grade because they had been open for less than three years.[25]

Without student-level control data, we cannot tell whether reported gains are due to student population changes, whether selection mechanisms are at play, and/or whether other policy shifts explain the results.[26] The achievement gains in New Orleans are impressive, but without more careful analysis we cannot attribute these gains to the city's portfolio model.

Successes and Challenges

While the presentation correctly identifies some of the challenges of the New Orleans portfolio model, including community and local district relations, some of what it identifies as "successes" are presented with little or no evidence supporting them. Given the autonomies described, the RSD does appear to have reduced bureaucracy and empowered school leaders, yet again there is no evidence presented on how such policies contribute to the operations or outcomes of schools.

As the RSD identifies under "Challenges," there are resource and sustainability issues due to the financial reliance on foundation funding and recovery money. In addition to the i3 grant, many of the charter networks in New Orleans and the human capital programs rely in part on national foundations.[27]

As part of their portfolio strategy, officials say they will improve student achievement by replacing failing charter schools with "proven organizations," yet it is unclear how they make this determination. There has been mixed evidence on KIPP, which has nine schools in New Orleans, due in part to attrition rates and the apparent exit selection bias with the lowest performing students leaving.[28] The presentation also claims to improve achievement by "increasing the number and percentage of students in charters," but evidence suggests that charter school impacts are far from even across the board.[29]

In the concluding slides, the authors emphasize "keeping a clear and consistent message" on student achievement, which is a commendable goal for any education system, but this focus is not unique to a portfolio model and thus raises questions about exactly what is the 'value-added' of this governance model.

School Closures and Accountability

The RSD has acted to close or transform low-performing charters. Since 2005, 11 charters have been shut down and two have changed governance.[30] Therefore, this essential piece of the portfolio mechanism—closing failing schools—has indeed been accomplished. Yet the problem of reconstitutions and closures is a great deal more complex than these slides portray.

The "shifting the bell curve" slide raises a larger question about the sustainability of continuous reconstitution by the RSD. Any district that accepts the portfolio/reconstitution and closure model must deal with the questions of where students go when schools are shut down and whether the educational quality will be higher. As Jennifer King Rice and Betty Malen wrote in their review of the literature on school reconstitution:

> Reconstitution may enhance the stock of human and cultural capital in schools, but the evidence we reviewed does not establish that reconstitution is a dependable or effective mechanism for attracting and retaining large pools of highly qualified educators in low-performing schools or for enhancing social capital in those settings. Indeed, some studies reveal that reconstitution may deplete those critical resources.[31]

School closures in 2012–2013 have been especially contentious and some reports by investigative journalists have reported that students are ending up in similarly failing schools.[32]

The one study cited in the RSD slides, CREDO's National Charter School Study, is quoted as saying that "the charter sector is getting better not because existing schools are getting

better but because bad ones are closing," but that quote was made about the national context, rather than New Orleans.

Improving Human Capital

The presenters do not define what they mean by "improving human capital," and it is thus a questionable claim. Given what we know about post-Katrina human capital shifts, and a greater reliance on programs such as The New Teacher Project and TFA, it is unclear whether these teachers are all qualified to work well with students and whether they have had any significant impact on student learning in New Orleans. In fact, there is no system-wide reporting of exactly who teaches in New Orleans, their background and qualifications, or their teaching practices, let alone impact studies. Furthermore, while programs like TFA bring college students with degrees from prestigious institutions, the research on their effectiveness is mixed, typically with small effects in either direction.[33]

Overstates Safeguards for Students, Downplays Community Conflict

The presenters caution prospective districts to ensure safeguards for students in the areas of school access, discipline, and special education. In the past couple of years, the RSD has taken significant steps to create some essential safeguards. First, it implemented the OneApp, a centralized enrollment system, which allows parents to more easily apply to schools and provides some oversight in the admissions process. Second, they have implemented a centralized discipline system, whereby the district now tracks expulsions in a unified way, establishing the specific infractions that may warrant expulsion. And yet, despite these steps, there are still concerns in the community about appropriate safeguards for students with special needs. There has been a lawsuit filed by Southern Poverty Law Center.[34] And as the Cowen Institute's 2013 report on the "State of Public Education in New Orleans" states: "No single entity is responsible for ensuring students with special education needs are served, making it difficult to track students across schools."[35]

The presenters also note that "community relations" have been a challenge, but they downplay the extent of community concerns regarding RSD reforms. Several groups have been formed to address a perceived lack of responsiveness of the RSD to community and parental concerns. These groups include the Coalition for Louisiana Public Education, the NOLA Educational Equity Roundtable, and the Coalition for Community Leadership in Education, whose website enumerates several concerns about the charter approval process, including that "all new local groups applying for charters were uniformly and unfairly denied charters; the charter application process disadvantages community groups; there is no formal appeals process to allow groups to respond to concerns regarding their applications; the charter application process is neither consistent nor transparent."[36] Therefore, while we commend the presenters for acknowledging community challenges, their assessment downplays the scale of community conflict surrounding the portfolio reforms.

Presentation on Tennessee's Achievement School District: "Building the Possible"

The reforms in Memphis are too new to have been adequately studied. The data cited are only from two years, and from only a small sample of seven schools. The ASD claims it will move failing schools to the top, and a chart on one of the slides shows movement of the bottom 5% of schools in Tennessee to the top 25%, but it is unclear how the projections

> *The presenters laudably claim that it is necessary for portfolio districts to do "careful data analysis," which should include ruling out rival hypotheses. Regrettably, they did not apply this sound principle.*

were determined. Such claims ignore the devastating poverty and isolation of students' lives, which would have to be rapidly overcome to move the schools to become competitive with Tennessee's more affluent public schools.[37] Less than 12 months into the reforms, they claim "level 5 growth." But again, nowhere was it explained what "level 5 growth" was or how it was attained. Similarly, it is claimed that expulsion rates were cut in half, from 3.5% to 1.3%, and there is no discussion of how that was achieved.

The presentation shows that the portfolio model has led to test-score gains in certain subject areas. One chart shows gains in math and science, but a drop in reading and language arts. Like the data from New Orleans, these charts are descriptive, and we cannot know what is driving the changes. As in New Orleans, these gains could be due other policy changes, demographic changes, or selection effects. Furthermore, in later slides, the presentation highlights one school's gains in reading and language arts proficiency, which appears to be cherry-picked given the previous slide's indication that overall scores in the subject decreased.

The presentation highlights its efforts to recruit "great people" and talent, without explaining what this means or how it is measured. Where these teachers are coming from and their professional qualifications are not defined. One-fifth of the teachers in the program were from Teach for America, an organization that has shown mixed results in other cities.[38] Moreover, the slides did not discuss the fact that Memphis only re-hired five of its former teachers and three administrators out of more than 50 teachers and seven administrators from the takeover schools in Memphis; all others were fired, although the district hired 50 replacement teachers from other Memphis public schools.[39] Finding and recruiting qualified teachers may not be feasible or culturally, politically, or economically desirable in cities seeking to adopt a portfolio model.

One of the slides appeals to "freedom," but the specific autonomies given to schools or parents are not defined. If it means freedom to choose schools, the *New York Times* reported that ASD schools must accept any student who lives in their zones,[40] so parents outside the attendance zone can gain access only if there is additional capacity. Similarly, the presentation claims that parents and teachers are very satisfied, but does not mention how these stakeholders were surveyed, the response rates, and the differences in

satisfaction rates from previous years. Again, these pieces of information would probably be addressed more thoroughly in a longer report, but because response rates matter for survey claims and sufficient response rates are difficult to attain, this is an important point.[41] The claim of greater satisfaction is an unsubstantiated change.

Unaddressed Issues in the Two Presentations

Finally, we note there are several substantive issues that were not adequately addressed in either report. These include governance, representation, segregation, and school finance.

The issue of whether RSD schools that are no longer failing will be returned to the locally elected Orleans Parish School Board (OPSB) raises important but unaddressed governance issues. Schools may elect whether or not to return to OPSB, yet charter school boards decide this, and the results have been contentious.[42] Professor Lance Hill of Tulane, for example, described the perceptions of some local residents who believe they have lost democratic control of the schools. He wrote in a local blog in 2011:

> The corporate education forces that advocate a free-market business model have developed a 'beachhead' strategy in New Orleans. Taking advantage of the evacuation of 90% of the population after Katrina, they set in motion educational changes that bypassed the elected school board and destroyed virtually all local democracy and accountability.[43]

Some researchers have contended that the charter reforms in New Orleans have resulted in higher levels of racial segregation than would naturally occur in a neighborhood schools system, based on residential patterns in the city.[44] Despite significant time and resources spent on busing students across the city, the portfolio model has not prioritized any type of racial or economic desegregation policy.[45]

The question of finance was also under-addressed by the RSD slides. With the exception of a bullet point under "Challenges" that mentions the imperative of finding sustainable funding sources, the amounts provided from outside the public system were not acknowledged. Foundation dollars have supported many aspects of the RSD reforms; administrator salaries in charter schools have been supported by the federal i3 reforms and the Teacher Incentive Fund grants to New Schools for New Orleans.[46] New Schools for New Orleans estimated that a mid-sized city would need to spend between $25 and $50 million for the first five years of a state reform district,[47] and philanthropy must play a substantial role. Any system considering adoption of a portfolio model needs to consider its true costs and how the state would pay for the reforms.

VII. Usefulness of the Report for Guidance of Policy and Practice

Portfolio models and school reconstitution represent potential strategies for intervention in low-performing schools, and are worthy of attention. However, adoption of this model

needs to be based on a careful, critical and comprehensive review of the research evidence on both the portfolio concept level as well as of the constituent parts. The evidentiary base presented is very thin for both Louisiana's and Tennessee's portfolio districts. There is considerable external evidence on some of the elements but it is not reflected in the presentations. The presenters laudably claim that it is necessary for portfolio districts to do "careful data analysis," which should include ruling out rival hypotheses. Regrettably, they did not apply this sound principle. The claimed successes of these two portfolio districts are questionable in themselves. But the greater problem is in the ascription of improvements to the presence of portfolio management structures. We thus encourage great caution by policymakers at every level of government in making high-stakes decisions based on such presentations.

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DOCUMENTS REVIEWED	**Building the Possible: The Achievement School District's Presentation in Milwaukee** **The Recovery School District's Presentation in Milwaukee** (PowerPoint Presentations)
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