Charter School Evaluation: Trends, Challenges, and Prospects

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Abstract

Over the past two decades, charter schools have grown from a concept to a small movement to an established constituency in public education. The increasing number and importance of charter schools provide both opportunities and challenges for evaluators. Much evaluation work is needed for analyzing the effectiveness of charter school policies, assessing the success of individual charter schools, and promoting charter schools' improvement. Challenges include charter laws and practices that vary from state to state, the difficulty in establishing appropriate comparison groups, the uniqueness of individual charter schools, and evaluators' preparation to work in these dynamic educational settings. This review will address these opportunities and challenges at three levels: summative evaluation of large-scale charter school policies and the charter school movement, high-stakes evaluation of individual schools by authorizers, and formative evaluation of individual schools. While addressing past developments and current trends, this paper will also provide prospects for the future of charter school evaluation.

Charter School Evaluation: Trends, Challenges, and Prospects

Over the past 20 years, charter schools have developed from a concept into a powerful force in education reform. Recent estimates place 1.4 million students in 4,700 charters schools across 40 states and the District of Columbia (CREDO, 2009). Charter schools have been the subject of more student-achievement evaluations than have other school-choice models (Miron, Evergreen, & Urschel, 2008). Given the two decades of growth and President Obama's campaign commitment to charter schools, both the charter-school sector and the number of evaluation studies are likely to increase in coming years.

Large-scale evaluations of student achievement have received much attention in the press and the K-12 education field—especially with two major studies published in 2009 (CREDO, 2009; Zimmer, Gill, Booker, Lavertu, Sass, & Witte 2009). Evaluation of charters schools, though, has multiple facets. For individual charter schools, local evaluation activities can have much more significance than do national studies.

AEA conference programs from recent years include a small number of presentations related to charter schools. Often, these presentations focused on a specific evaluation project. Presentations speaking to larger issues of theory and practice have been rare. This paper is an attempt to begin filling the gap. It provides an overview to significant evaluation activities in the charter school arena, including high-stakes evaluation at the local level and formative evaluation.

Charter Schools

A charter school is a public school established upon the basis of a charter. The charter is an extensive, performance contract with an authorizer.[1] Authorizing entities vary by state, but commonly include local and county school boards, public universities, and mayors' offices. A school's charter typically includes descriptions of plans for its educational program, measureable student outcomes, assessment procedures, admissions policies, governance, personnel policies, health and safety procedures, and many other elements. Authorizers approve charters for a limited term (often five years). Based on accountability standards, the authorizer usually renews the charter at the end of its term. A school can earn an unlimited number of renewals to its charter.

Minnesota enacted the first charter school legislation in 1991 and other states followed. Although the purposes for authorizing charter schools differ somewhat between states, there are some common purposes. These include improving student achievement,

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[1] Charter laws differ from state to state. The statements in these paragraphs are general and might not apply to every state.

promoting innovation in curriculum and instruction, creating new professional opportunities for teachers, increasing parent and community involvement in education, providing options for parents and students, and improving traditional public schools by providing a source of competition.

The three central dynamics in charter reform are autonomy, accountability, and choice. Charter schools have greater *autonomy*. They are exempt from many of the laws and regulations that apply to other public schools. School leaders have broad choice in terms of curriculum, textbooks, pacing, class schedules, and instructional methods. Charter schools also have greater control over financial and personnel decisions. These areas of autonomy are intended to reduce "red tape" and allow schools to focus on performance rather than compliance. In exchange for increased autonomy, charters accept high levels of *accountability*. In addition to being accountable for specific laws and regulations, a charter school is accountable for fulfilling the commitments in its charter. Thus, a charter school is accountable for its performance in student achievement, fiscal management, and school operations, as well as providing a safe and appropriate educational environment. If a charter school consistently fails to meet performance standards or the terms of its charter, it can be closed by the authorizer or state. Charter schools provide a prominent means for school *choice* within the public education system. State laws typically prohibit school boards from requiring any student to attend a charter school or any employee to work at a charter school. Thus, families can choose a school to meet their educational needs and teachers have choice in where and how they practice their profession.[2]

Charter School Evaluation

Charter schools comprise an educational sector surrounded by controversy. Although many of the controversies are political and/or philosophical in nature, many others can be addressed through program and policy evaluation. The most fundamental of these issues is whether charter schools are outperforming traditional public schools. A significant challenge to evaluations of charter-school performance involves the characteristics of charter school students and parents. Are students and parents at a school of choice in some (potentially unmeasured) ways different from those who stay in traditional public schools? How do these differences influence student achievement? Other prominent controversies and questions relate to concerns about charter schools

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[2] For broader and deeper information on charter schools, see the web sites of the National Association of Charter School Authorizers www.qualitycharters.org , US Charter Schools www.uscharterschools.org , the National Alliance for Public Charter Schools www.publiccharters.org , and the Center for Education Reform www.edreform.com .

"creaming" or "skimming" the top students from traditional public schools, demographic imbalances between charters and traditional public schools, and the potential effects of competition on traditional public schools. Also, how does resistance from authorizers and teachers' unions affect the development of charter schools? Similarly, funding imbalances and factors related to facilities can affect charter school development and performance.

Working within this politically intense environment, evaluators face many technical challenges. Charter schools are—by design—unique. Many of the typical measures for evaluating district schools do not apply to charters. Improving standardized test scores, the overriding goal of public schools in the age of *No Child Left Behind*, may be one among many goals for a charter school. Specific academic capabilities, college acceptance, and positive youth development might be just as important for individual charter schools. Toward achieving these goals, charter schools will make local choices on course offerings, curriculum, instructional techniques, pacing, instructional minutes, extra-curricular support for students, professional development, and parent involvement. Evaluators working with charter schools must take explicit steps to implement evaluations that are responsive and useful.

This paper is a small step in summarizing theory and practice in charter school evaluation. With attention to current practices, ongoing challenges, and prospects for the future, this paper addresses three facets of charter school evaluation: large-scale evaluation of charter school performance, high-stakes (renewal) evaluations of local charter schools, and the use of formative evaluation for program improvement.

Large-Scale Policy Evaluations

"How are the charter schools doing?" This is a question—phrased in various forms— that is asked on a daily basis by the public, parents, and policy makers. Betts and Hill (2006) refined this question to "whether students in charter schools are learning more or less than they would have learned in conventional public schools" (p. 1). The simple answer to this question is "neither." Although the question is far from settled, recent studies have indicated that charter school students are neither learning more nor less than they would have learned in traditional public schools. Similarly, student achievement patterns for charter schools are not significantly different from those of traditional public schools. It is beyond the scope of this paper to provide any new answers to this complex question. The following section will address issues related to methods, results, and prospects for evaluation practice.

Improvements in Methods

As a multi-state movement of almost two decades, charters schools have been a prominent subject in school-reform studies (Miron et al., 2008). The quality of these studies has improved greatly since the early 1990s. Early studies tended to offer simple comparisons of standardized test performance between charter school students and their peers in traditional public schools. These studies did not adequately address gains across time or the many factors that might affect test scores.

Current studies have employed much more sophisticated methods and statistical models to address the relative performance of charter schools. These include hierarchical linear modeling (Braun, Jenkins, & Grigg, 2006), the student fixed-effect approach (Zimmer et al., 2009), value-added models (Booker, Chaplin, & Isenberg, 2008), lottery-based random assignment (Hoxby, Murarka, & Kang, 2009), and matching via a virtual control record approach (CREDO, 2009). Although each of these methods has some limitations, they provide much more trustworthy estimates of relative performance than did earlier studies. The growing literature also includes critical analysis of methods used to assess the performance of charter school students (Betts & Hill, 2006; Hoxby & Murarka, 2006; Miron & Applegate, 2009).

Challenges and Complications

Even with the many advances in sampling and analysis in recent years, there are still many factors complicating the estimation of charter school performance. Although "there are many bad ways to analyze charter-school performance" (Zimmer et al., 2009, p. xviii), there is no single "best way." Statistical complications include addressing both observed and unobserved effects on performance, assessing change across time, analyzing data of students who change schools within the data collection window, and estimating predicted scores.

Conceptual challenges relate to the diversity across charter schools. Studies often attempt to determine the "typical" or "average" effects for a group of schools that are intentionally unique. Not only do different schools set their own policies and priorities, but they operate under different conditions. These conditions include state laws, authorizer policies, and the evolution of charter school reform in the school's community and/or state (Miron, Coryn, & Mackety, 2007). Finally, charter schools develop and show improvement over time—especially in the early years of the charter.

The most challenging issue continues to be selection bias. Because charter schools are schools of choice, there are likely to be important differences between charter school

students and traditional public school students in areas that are not measured in current student data (e.g., student motivation, parent involvement). This issue is relevant to any voluntary educational reform model, but charter schools offer the best of potential solutions to this challenge: lotteries. If a charter school has more applicants than seats available, the typical—and often legally prescribed—method for selecting students is a randomized lottery. Studies comparing the performance of those students "lotteried in" to those "lotteried out" have been deemed the "gold standard" and comparing "apples to apples" (Hoxby & Murarka, 2006; Hoxby et al, 2009). Although this is currently the most rigorous design available for charter school performance studies (Betts & Tang, 2008; Miron & Applegate, 2009), this design also has serious shortcomings for large-scale evaluations (Hassel & Terrell, 2006; Zimmer et al., 2009). First, many charter schools are not oversubscribed and would not have a lottery. A foundational tenet of school choice is that parents will choose to send then children to better schools. Thus, it is reasonable to infer that undersubscribed schools are of lower quality. Large-scale studies relying solely on lotteries would likely over-represent high-quality charter schools. Second, many parents of students who were "lotteried out" are likely to look for other options outside traditional public schools (e.g., other charter schools, magnet schools, private schools). Thus, a number of the most motivated and resourceful families would not be among the "lotteried-out" students in the control group, artificially inflating positive effects for charter schools.

Another confounding factor with serious implications is underperforming charter schools. Multi-state studies of charter-school performance have found that underperforming charter schools can greatly reduce the overall effects for charter schools (CREDO, 2009; Miron, et al., 2007). While acknowledging that Illinois has raised charter-school performance by closing some underperforming schools, Miron, Coryn, & Mackety (2007) lament that "the weaker charter schools in the other [Great Lakes] states continue to overshadow the successful charter schools" (p. 2). Nationally, there is an epidemic of failing charter schools that deserve to be closed (CREDO, 2009). When charter policy implementation catches up with plans and promises, notable gains in overall charter-school performance should result.

Recent Results

This year has seen the release of two multi-state studies applying sophisticated methods. A RAND Corporation study addressed charter schools in 8 states (Zimmer et al., 2009) and a Stanford University study included 16 states (CREDO, 2009). Although using different statistical models and including some different states, the two studies

produced results that overall were similar. Charter schools did not outperform traditional public schools.

The RAND study, in addition to assessing student achievement, addressed other questions important for evaluating charter school policies (Zimmer et al., 2009). There were four major findings: (1) On average, test-score gains of charter secondary schools are similar to those of traditional secondary schools. (2) Charter schools are not "skimming" the top students from traditional public schools. (3) Charter schools are not substantially affecting achievement scores at nearby traditional public schools. (4) In states with available data, secondary charter school students were more likely to graduate and attend college.

In widely disseminated results, the Stanford study found that almost half of charter schools posted math gains that were highly similar to those of traditional public schools (CREDO, 2009). About 1/6 of the charter schools outperformed traditional public schools and more than 1/3 "posted math gains that were significantly below what their students would have seen if they enrolled in local traditional public schools" (p. 3). Overall, the study found a small, negative performance effect for charter schools in both reading and math. Although statistical significant, the effect for reading was of no practical meaning. The effect for math was both statistically and practically significant.

In a review of the CREDO report, Miron and Applegate (2009) stated that the study supports a well-established literature indicating that charter schools are not outperforming traditional public schools. They also summarized two recent syntheses of charter school impact (Betts & Tang, 2008, Miron et al., 2008). In both reports, the overall effect size for charter schools approached zero. Across time and with the use of more sophisticated analytic methods, charters schools have performed similarly to traditional public schools (Miron et al., 2008).

There are some studies, though, indicating positive results for charter schools. Hoxby (2004) found that charter school students—in comparison to students at the nearest traditional public school—were more likely to be proficient on their state's reading and math exams. Also, the differences increased when the charter school and the nearest traditional public school had similar racial compositions. More recently, in a study approximating random assignment, Hoxby, Murarka, and Kang (2009) found a number of advantages for students who were in New York City charter schools for multiple years. These included progress toward closing the "achievement gap" in math and English, higher Regents examination scores, and increased likelihood of earning a Regents diploma. Charter schools in six Great Lakes states posted noteworthy

achievement gains across time (Miron et al., 2007). In a literature review of studies meeting specific quality standards, Betts and Tang (2008) identified many areas in which charter schools outperformed traditional public schools. Finally, student gains in charter schools increase over time; as a student spends more years in the same charter school, her or his gains become greater (CREDO, 2009; Hoxby et al., 2009).

<u>Implications and Prospects</u>

Researchers with some of America's top institutions are expending great efforts to find better methods for determining whether students in charter schools are learning more or less than they would have learned in traditional public schools. Others, however, argue that they are asking the wrong question or, at least, not enough of the right questions. Berends, Watral, Teasley, and Nicotera, (2006) stated that the proper question addresses the conditions under which charter schools work (rather than how well charters school—as a sector—work). They advocated opening the "black box" and exploring the reasons that some charter schools work better than others. Similarly, Hassel & Terrell (2006) noted that studies of a diverse educational sector will inevitably produced mixed results. The question of how charter schools are doing is an "overall generalization [that] will mask the great diversity within" (p. 3). Instead they offered a set of questions to address how well a charter-school policy serves a specific state.

The journey to develop better methods for measuring charter-school performance is both beneficial and inevitable. Still, these methods are likely to return "mixed results," which are of little use to policy makers. The following are four prospects for making-large-scale evaluations of charter-school performance more useful to policy makers.

Conditions within charter schools. Current large-scale studies pay limited attention to the within-school dynamics that could explain could explain variance between students and charter schools (Betts & Hill, 2006; Berends et al., 2006). Relevant data would include curriculum and instruction, teacher qualifications and compensation, academic focus, years in operation, and organizational factors. Incorporating these and other data would help to determine what contributes to successful charter schools' performance.

Conditions surrounding charter schools. Policies and practices vary greatly across states and authorizers. Also, each school operates within diverse local conditions. Just as within-school factors can affect a school's performance results, so can contextual factors. These include the specific regulations to which a school is exempt, a school's level of independence from a district/authorizer, public funding, political support for charters at the local level, accessible education alternatives for families, the number of years the state and/or authorizers have had charter schools, state caps for charter

schools, and the number of authorizers in a state (Betts & Hill, 2006; CREDO, 2009; Miron et al., 2007).

Non-test student outcomes. Large-scale evaluations of charter-school performance have a definite emphasis on test scores. Although standardized test scores are the most widely accepted indicator of student performance, most charter schools do not have test scores as their sole commitment. Many take pride in focusing on the whole student. Three recent studies have honored charter schools' commitment to academic goals broader than improving test scores. One national study addressed the likelihood of graduating from high school and attending college within a sub-sample of schools (Zimmer et al., 2009). An evaluation of charter schools in New York City included likelihood of graduating high school with a Regents diploma (Hoxby et al, 2009). The authors also expressed a hope to include post-graduation outcomes (e.g., college, jobs) when an adequate number of students in their sample have graduated. The CREDO (2009) report acknowledged its narrow focus on test scores and identified other areas in which charter schools might contribute to their students' academic development. These were increased attendance, reducing drop-out rates, and providing a broader curriculum.

In addition to academic focus of current evaluation, many charter schools have an explicit commitment to students' social development. This could be an important subject for future evaluations of charter-school performance.

Non-student data. Stating that evaluations focusing only on student achievement are bound to produce mixed and indeterminate results, Hassel & Terrell (2006) consider evaluation questions addressing larger policy issues:

> Is it [the policy] producing new and better schools? How are the schools being chartered different from district schools? Are good charter schools expanding and being copied, while poor schools close or stagnate? Is the quality of chartering getting better over time? (p. 3)

Consistent with the RAND study (Zimmer et al., 2009), Hassel & Terrell (2006) also note the importance of examining charter schools' contribution to potential improvement at traditional public schools. Such questions would lead to information vital to evaluating the effectiveness of state-level charter school policies.

Finally, evaluation of charter schools extends far beyond large-scale studies to assess the effectiveness of the charter school movement. Evaluation is vital to improvement of individual charter schools and charter sector. Two specific functions—high-stakes

evaluation for individual charter schools and evaluation to promote improvement—are the subjects of following two sections.

High-Stakes Evaluation

While researchers have been busy developing and debating better designs and analysis techniques for studying the charter school sector, local charter school leaders face a more pressing concern: renewal. A charter has a limited term, typically five years, but potentially as short as one year. A charter school's survival depends on its success in the renewal process.

Renewal requirements vary across states and between authorizers within the same state. Typically, though, they involve accountability for student achievement on standardized tests, fulfilling unique commitments made in the charter, and meeting other standards set by authorizers.

This section addresses requirements and processes in charter-renewal evaluation. Drawing on published materials from many authorizers,[3] it focuses on categories of performance, data collection, scoring, and use. It concludes with a brief discussion of major issues challenging the effectiveness of renewal evaluation.

Renewal Evaluation Categories

As renewal procedures and requirements reflect states laws, they differ from state to state. Still, categories tend to be very consistent across the nation. Three basic questions summarize the predominant concerns (Oakland Unified School District, 2008, p. 7, *capitalization in original*):
1. Is the school an Academic Success?
2. Is the school an Effective, Viable Organization?
3. Has the school been Faithful to the Terms of its Charter?

Success of the school's academic program. There are two dimensions to assessing a charter school's academic program. The first is student performance, which is used by each authorizer in this review. The second, applied by a fraction of the authorizers involved evaluating the academic program itself (e.g., curriculum and instruction).

Charter schools, as public schools, are required to participate in state testing programs. Typically, charter schools are expected to meet state-specific criteria as well as federal

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[3] The sample includes requirements at city and state levels from authorizers in different geographic areas of the country. Although the sample is not statistically representative, it is useful for identifying and illustrating common issues in renewal evaluation. A list of documents may be found in Appendix A.

Adequate Yearly Progress (AYP) requirements. In addition to these requirements, a small number of authorizers also apply techniques similar to those used in large-scale policy evaluations. These may include value-added analysis of test-score growth at the student level, comparisons to the schools the charter school students would have attended, and comparisons to nearby and/or demographically similar schools (Indianapolis, New York city, Oakland, San Diego). Most authorizers also include school-specific measures of academic performance, as stipulated in the charter. These may involve, for example, student performance on standardized tests other than those required by the state, results of alternative assessments, and progress on particular academic outcomes of importance to the school. Other academic-program outcomes included by charter schools and/or authorizers include rates of graduation, college acceptance, attendance, and students transferring out of the school.

Although most of the reviewed authorizers treat academic-performance results as the evidence of an academic program's success, some also evaluate the process of instruction. Through charter-school self-reports and/or site visits, some authorizers rate academic programs in terms of the learning environment; curriculum; textbooks and other materials; instructional practices; student engagement; services for at-risk students, English learners, and students with special needs; other types of student services; assessment and data-driven decision making; and instructional leadership (Florida, Massachusetts, New York city, New York state, North Carolina).[4] Many of the specific criteria are determined by the authorizer. This is also where an authorizer can assess a school's fidelity to the education program outlined in its charter.

Organizational viability. In addition to creating and implementing its academic program, a charter school also has financial and operational responsibilities beyond those of a traditional public school. Although charter schools' financial independence can differ between states and types of charter schools, the typical charter school has much financial independence and accountability. The most common requirements for charter schools are to submit to regular audits and to use "generally accepted accounting practices." Authorizers also seek to ensure financial health and sound financial management. Specific topics include budgeting and planning, internal controls, staff and board capacity for financial management, maintaining an adequate source of income through enrollment and attendance, and meeting financial obligations (i.e., paying bills on schedule).

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[4] Other authorizers classify some of these factors under organizational viability.

There are also governance and operations responsibilities unique to charter schools. Most charter schools have a board (independent of the authorizer) and full responsibility for personnel decisions. An authorizer might evaluate a board in terms of its membership and capacities (e.g., educational administration, legal, financial), frequency of meetings, board agendas and minutes, and involving parents and/or teachers. As instruction is the core activity of a school, instructional leadership, faculty qualifications, and human resources are other common criteria for evaluating a school's organizational viability. Parent satisfaction with the school also is a common criterion.

Faithfulness to the charter. The most fundamental issue should be the school's faithfulness to the commitments and agreements in its charter contract. Although much of charter's content is unique to the school, many details are imposed by an authorizer. These can include compliance with specific federal and state laws, authorizer policies, and reporting requirements. Often these items are provided by the authorizer and listed in the charter. School leaders sign the list of "assurances" or "agreements." Specific topics can include practices for enrollment, school facilities, health and safety, special education, financial management, and conflict of interest.

In addition to legal and regulatory compliance, this category is where some authorizers assess the school's pursuit of the unique commitments it made in the charter. By the nature of chartering, it is difficult—if not impossible—to spell out these criteria in a renewal policy or protocol. Each charter school makes its own commitments, and accountability criteria must respond to those commitments. Specific commitments in charters can include the vision and mission, educational program, governance structure, parent involvement, student services, and enrollment.

Data Collection

The trade-off between thoroughness and costs is an ongoing challenge in renewal evaluation. Both authorizers and schools seek to have renewal evaluations based on multiple criteria and multiple sources of data, but need to work with available resources. The best case for both parties is when extant data can be used for renewal evaluation. These data can include standardized test scores, student file data, attendance records, and mandatory audits.

As part of the renewal process, charter schools usually submit a petition and/or self-study. Some charter schools chose to contract third-party evaluators, either on a regular basis or specifically for renewal. These steps provide charter schools with an opportunity to tell their own story and begin steps for correcting deficiencies. Costs, in terms of money and time, for developing these documents can be burdensome. Another

downside is the authorizer may question the credibility of a school's self-report data or the data produced by a third party hired by the school.

The authorizer's data collection process begins with ongoing monitoring. At minimum, this includes enrollment and attendance, financial practices, and health and safety. Most jurisdictions include site visits, whether annually or specifically for the renewal. Site-visit teams may consist of authorizer staff members, state board/department of education staff members, and/or consultants hired for the renewal. These steps provide authorizers with data they consider credible, but at notable expense. Also, charter schools might not trust data produced by members of the district and state educational bureaucracies. Some authorizers have contracted third-party evaluators, such as Cambridge Education (Oakland) and RMC Research or SchoolWorks (Massachusetts), to perform program reviews as part of the renewal process.

<u>Rubrics and Recommendations</u>

During the renewal process, authorizers amass large collections of numeric and narrative data. Their challenge is to convert the data into a concise and reasoned recommendation to the officials who ultimately make the renewal decision. The process can become opaque here, with none of the reviewed authorizers providing a clear set of steps for moving from data to recommendation.

Scoring rubrics. About half of the authorizers offer some form of rubric scoring. These rubrics range from three to five levels. The most basic are "high, middle, low" (Chicago, New York city) and "meets the standard, partially meets the standard, does not the meet standard" (Florida, San Diego). Oakland offers a five-point rubric: "excellent, proficient, underdeveloped, inadequate, unsatisfactory." Typically, these levels are anchored by descriptions. For example, New York City Department of Education (2009, p. 12) offers the following:

1. High - Clearly meets/exceeds expectation
2. Middle - Meets the minimal expectation and/or is inconclusive and may require further evaluation
3. Low - Clearly does not meet expectation

Oakland (2007, p.5, *emphasis in original*) offers an extensive description for each point on the rubric. For example:

An evaluation of **(4)** applies to schools where efforts to improve student achievement are characterized by a number of strengths. There are a few weaknesses, but neither singly nor collectively, do these have a significant adverse impact on the student experience. An evaluation of **(4)** may be appropriate in circumstances where the organization may make for a productive

student experience; but it may not apply consistently to some students. There is strong evidence that this element can be sustained at a level that positively impacts student experiences. Typically, the school's academic improvement practices will be characterized by strengths but one or more weaknesses will reduce the overall quality of the practices. The Quality Indicator (QI) for this element is *proficient.*

Some authorizers present numerical cut points when applicable. For example, to earn a rating of "High Performance" for one of New York City's academic achievement criteria, at least 75% of students must score "proficient" on state English Language Arts and Math exams. For a charter school in Indianapolis to earn "Exceeds Standard" for parent satisfaction, at least 90% of surveyed parents must report overall satisfaction with the school. Each of these authorizers also includes descriptive anchors for criteria less appropriate for simple quantification.

Renewal Recommendations. After compiling the data—and potentially scoring them—authorizer staff must make a recommendation to decision-making officials. The basic recommendation is either renewal or non-renewal. Some authorizers offer a middle road by recommending renewal for time period that is shorter than the standard number of years (North Carolina) or recommending renewal with conditions (San Diego). New York State has four levels: Short-Term Planning Year Renewal, Short-Term Renewal, Full-Term Renewal, and Non-Renewal. Any of these recommendations can be accompanied by conditions when a school otherwise deserves renewal, but has a "material deficiency" that be must corrected quickly.

The reviewed authorizers are not forthcoming on how they convert ratings into a recommendation to decision-making officials. San Diego is unique in presenting a rubric for its recommendations. To be eligible for renewal without conditions, a charter school must meet all eight of the renewal criteria (three academic performance criteria and five operational viability criteria). Schools not meeting all of the criteria, but meeting most criteria—including some specific ones (performance on state tests and financial stability)—are eligible for renewal with conditions. A recommendation of "non-renewal possible" can come when a school meets very few of the eight criteria.

Realities of Renewal

The ultimate purpose of the renewal procedures discussed above is to identify charter schools that are consistently failing, so they can be closed. Despite the articulation of these procedures, charter schools rarely close. This is not primarily a technical matter, but a matter of evaluation use. The closing of a charter school is fraught with political

and practical difficulties (CREDO, 2009; Rotherham, 2005; Upton, Bachofer, Scott-English, & Barker, 2009).

Although data on charter school closures are neither clear not consistent, a picture is beginning to emerge. By 2004, approximately 300 charter schools had closed, representing less than 10% of all the charter schools that had opened up to that time (Vanourek, 2005). Since that time, charter school closures have risen. More than 200 closed during the 2005-06 and 2006-07 school years (Christensen & Lake, 2007). Some commentators have noted that an increase in closures—rather than being a cause for concern—could be a sign of the charter movement's maturation. It is a foundational tenet that bad schools will close (Christensen & Lake, 2007; Rotherham, 2005).

Of the charter school closures that do occur, few are due to academic reasons (CREDO, 2009; Vanourek, 2005). A recent report attributed only 10% of closures to academic reasons, but 33% and 31%, respectively, to financial reasons and mismanagement (Upton et al., 2009). Others have noted that many more schools with academic problems officially close due operational difficulties (Rotherham, 2005; Vanourek, 2005). Politically, it is much easier to close a school for corrupt governance or financial mismanagement (CREDO, 2009). If an authorizer believes it needs to close a school, it is likely to use the most expedient means available.

Referring specifically to how rarely charter schools close due to academic reasons, authors of the CREDO (2009) report proclaimed "an authorizing crisis in the charter school sector" (p. 8). Charter schools that consistently underperform hinder students' academic development and deflate the performance figures of the charter sector as a whole (CREDO, 2009; Miron et al., 2007). The CREDO (2009) authors stated,

> If the charter school movement is to flourish, or indeed to deliver on promises made by proponents . . . , authorizers must be willing and able to fulfill their end of the original charter school bargain: accountability in exchange for flexibility. When schools consistently fail, they should be closed (p. 7).

Improving accountability for individual charter schools requires concerted effort among many parties. Evaluators should develop better and more consistent measures for renewal evaluation. Authorizers, states, and the charter school movement share a responsibility for addressing schools that consistently underperform—whether through closure or alternative steps identified by Rotherham (2005). Authorizers must step up to their responsibilities in developing and applying appropriate methods for charter school accountability (CREDO, 2009; Rotherham, 2005). States must enact the policies and provide the funding that makes this type of accountability possible (Rotherham,

2005). As has already begun in some states (Rotherham, 2005), charter school advocates must work to create conditions under which schools deserving closure can be closed (CREDO, 2009). The National Association of Charter School Authorizers (NACSA)—through its *Principles & Standards* and *Authorizer Self-Evaluation Instruments*—is taking the lead improving all aspects of charter school authorizing, including renewal evaluation and school closures.

Accreditation

Accreditation is an additional area where charter schools potentially face high-stakes evaluation. At the high school level, accreditation can affect transferability of credits and admission to post-secondary education. For elementary and middle/intermediate schools, accreditation can provide certification of quality and/or legitimacy.

As of this writing, the use of accreditation criteria unique to charter schools is limited to one of the six regional accrediting bodies, Western Association of Schools and Colleges (WASC), and only one state, California. Under the accreditation category of "organization," WASC (n.d.) offers two criteria on management and accounting of financial resources. Overall, regional accreditation procedures have yet to become responsive to the distinct responsibilities of charter school governance.

Controversies and Challenges

Renewal is an extremely controversial area within charter school evaluation. There are many challenges to appropriate and effective evaluation for renewal. These challenges—reflecting both technical matters and evaluation use—provide evaluators with many opportunities for advancing evaluation theory and practice in this context. The following items comprise some of the most important challenges and opportunities.

Data collection. Data collection is resource intense for both schools and authorizers. Evaluators have a role in reducing costs and raising credibility of renewal evaluation data. Ways of reducing costs include helping the parties distinguish data that are truly necessary from those that are merely nice to have, and finding ways to build renewal data into ongoing oversight and required reporting. Also, there is important role for third-party practitioners who provide credible and cost-effective reviews.

Data analysis. There is a vital need for methodologists to improve the analysis of renewal evaluation data. Overall, the trail from data collection to rubric scoring to renewal recommendations is more of a thorn-tangled maze than a path to a clearing. Current rubrics can be very vague, but highly detailed rubrics can force authorizers to

make regrettable decisions (e.g., a technicality requiring the authorizer to recommend non-renewal of a good school). There is important and painstaking work for evaluators in improving rubrics to forge a better path between data and recommendations.

Test-score analysis presents a more specific challenge. Many authorizers move beyond the state's minimum requirements to analyze a charter school's improvement and/or performance relative to traditional public schools. This type of analysis raises many of the difficult issues found in large-scale policy evaluations. Analytic methods currently lag behind the performance questions that authorizers are asking; this gap provides another opportunity for evaluators to contribute to renewal evaluation.

Scope of evaluation. A fundamental controversy involves the scope of renewal evaluation. What are the appropriate areas for an authorizer to consider when deciding to renew a charter school? The charter is the school's performance contract, yet many authorizers impose additional requirements for performance (e.g., outperforming similar districts schools, meeting specific financial standards). A second—and deeper—issue relevant to scope is the question of results versus process. Given the ethos of "accountability for autonomy," many jurisdictions limit renewal evaluation to specific outcomes in the academic, organizational, and financial realms. Some others evaluate processes (e.g., instructional practices, business-meeting procedures).

There are no simple answers to these controversies of scope. Many charter schools want to limit the scope of authorizer involvement and many authorizers want to be as hands-on as possible. The best and practical answers to these controversies will differ across states and authorizers. Individual evaluators and teams can work with existing state laws and authorizer policies to develop appropriate criteria and procedures. They can endeavor to create steps that are rooted in those laws and policies while also responsive to the needs of different stakeholder groups. At the state level, evaluation associations can engage policy makers to improve the laws governing all forms of educational evaluation, including charter renewal.

Use of renewal evaluation. This may be the most difficult area for authorizers and evaluators. While authorizer staff can make renewal recommendations based on evaluation results, elected or appointed officials are responsible for the actual decisions. In addition to political concerns related to charter school closure, there are some very human consequences. These include the potential for closing an underperforming charter school when nearby traditional public schools are performing worse than the charter school. Another issue was stated well by Rotherham (2005): "The most difficult

challenge for a charter school authorizer is when to close a persistently low-performing charter school that is nonetheless popular with parents" (p. 45).

The potential resolutions to these issues largely involve educational policy and practice: re-constituting traditional public schools that consistently underperform, providing more attractive and accessible options for parents, and improving all public schools. Although evaluators have limited ability to effect change in these areas, evaluation theory holds promise for sorting out the conflicting needs and consequences involved in renewal evaluation. As relevant evaluation models progress and officials become aware of these models, evaluators can support the difficult decisions involved in charter renewal.

Formative Evaluation

The most important factor in the results of both large-scale policy evaluation and high-stakes local evaluations is the quality of individual charter schools. Formative evaluation has the potential to fulfill a vital role in the improvement of charter schools. This section addresses formative evaluation initiatives at the national, state, and local levels, as well as prospects for the practice of formative evaluation in charter schools.

<u>National-level Initiatives</u>

Building Charter School Quality. Funded by the federal Department of Education, the Building Charter School Quality (BCSQ) initiative is a partnership of the National Alliance for Public Charter Schools, the National Association of Charter School Authorizers, the Colorado League of Charter Schools, and CREDO at Stanford University. The purpose of the project is to strengthen charter school performance-management practices as a step toward improving academic achievement at charter schools.

The initiative has used a "national consensus panel" process to develop a common and widely applicable set of quality expectations and performance measures for charter schools. To date, the partnership has produced *A Framework for Academic Quality* (National Consensus Panel on Charter School Academic Quality, 2008) and A *Framework for Operational Quality* (National Consensus Panel on Charter School Operational Quality, 2009).

The academic framework addresses four broad performance indicators: student achievement status, student achievement growth, student engagement, and (for high schools) post-secondary readiness and success. For each of these indicators, there are

multiple measures, metrics, and benchmarks. For example, student engagement has three measures: student attendance, continuous enrollment, and truancy. The first measure, student attendance, has two metrics (Average Daily Attendance rate, percentage of students attending a target percentage of days) and two benchmarks ("best-performing nonselective public schools in the chartering jurisdiction and state, best-performing comparable schools in the chartering jurisdiction and state") (p. 14). The post-secondary readiness and success indicator includes such metrics and measures as graduation rate, enrollment in college-prep courses, and admission to post-secondary institutions.

The operational framework addresses three aspects of charter school quality: financial performance and sustainability, board performance and stewardship, and parent and community engagement. Noting that operational goals are more specific to schools and authorizers than are academic goals, the panel did not identify targets or benchmarks for the operational framework. Each indicator, though, has multiple measures and benchmarks. Sample measures and metrics include occupancy expense, sustainability (total unrestricted net assets divided by average monthly expenses), the board setting expectations through "SMART" performance goals, contract management, and student and parent satisfaction (pp. 7-11).

These two documents provide rigorous frameworks for charter school operators, authorizers, and others to use for improvement. To promote the use of these frameworks, the partnership makes the documents available at www.bcsq.org and offers a two-day Performance Management Institute.

National Association of Charter School Authorizers. The National Association of Charter School Authorizers (NACSA) is attempting to improve charter school quality and student performance by improving charter school authorizing. One of its initiatives is the *Principles & Standards for Quality Charter School Authorizing* (NACSA, 2007). The five standards are the practical expression of nine principles. These standards address authorizer capacity and infrastructure, the application process, performance contracting, ongoing oversight and evaluation, and renewal decision making.

A companion document, *Authorizer Self-Evaluation Instruments* (NACSA, 2005), provides a set of tools for authorizers to assess their performance on the five standards. For each standard, there are between 16 and 38 specific benchmarks. For example, benchmarks for ongoing oversight and evaluation address using multiple sources of data, timeliness of reporting, allowing adequate time for remediation of deficiencies, and minimizing requests for non-essential paperwork. For each benchmark, the tools offer spaces for a

self-rating, listing "guiding documents," and briefly stating plans for accomplishing the benchmark.

<u>State-level Initiatives</u>

Charter school policies are a function of state laws. This provides a context in which state-level organizations can be an important source of technical assistance for individual charter schools and families of schools. These organizations can use this role to support program quality through evaluation and assessment activities. For example, two California organizations provide intensive programs for formative evaluation of charter schools choosing to participate.

The Charter Schools Development Center (CSDC) offers the "Charter School Quality Review" (http://www.cacharterschools.org/schoolreview.html). The review addresses the success of the educational program and the school's viability as an organization. Assessment of the former is based on goals stated in the charter and assessment of the latter is based on five factors: educational program, governance and operations, student and staff issues, financial management, and operational compliance. A multi-disciplinary team bases its findings on archival data, documents, on-site observations, and interviews.

The California Charter Schools Association (CCSA) offers the "Certified Charter Schools Program" (http://www.myschool.org). As such, it has both formative and summative functions. The process involves a self-study, a third-party review, and the development of an action plan. The CCSA (n.d.) *Quality Standards for Charter School Operations* provide the basis for these steps. This document provides five standards: (1) "Student Academic Achievement First," (2) "Ethical Leadership," (3) "Continuous Focus on Increasing Quality," (4) "Responsible Governance," and (5) "Fiscal Accountability" (pp. 3-7). The review and certification process is designed to promote the school's success and sustainability.

California is among the leading states in the charter school sector. These two initiatives provide a small but illustrative sample of the use of formative evaluation at the state level. There are others. The Colorado League of Charter Schools and the Hawaii Charter Schools Network have provided tools and services to promote charter school quality through formative evaluation. Also, the states of Michigan, Pennsylvania, and New Jersey have commissioned large-scale formative evaluations of their charter schools. The two examples from California highlight the ways that state-wide organizations can support individual charter schools that commit to program improvement through formative evaluation.

<u>Local-level Initiatives</u>

Charter renewal evaluation is ultimately a matter of accountability rather than improvement. Despite the summative purpose, authorizers have included formative components in renewal evaluation and ongoing oversight. Many use mid-term site visits as a means of providing prompt feedback on issues related to compliance and quality. Two authorizers provide examples of explicitly integrating formative evaluation into the renewal evaluation process.

The City of Indianapolis uses an accountability system based on four questions. The first three are the basis for renewal decisions and address common themes in renewal evaluation: success of the educational program, organizational effectiveness, and compliance. The fourth question ("Is the school providing the appropriate conditions for success?") is intended to "provide a rich picture of the school for parents and the public, give valuable feedback to the school about how it is working, and provide the mayor's office early on with important feedback about any shortcomings at the schools that must be addressed" (Office of the Mayor, n.d., p. 1). While conducting its renewal review, which includes an extensive site visit, the external review team addresses eight items relevant to conditions for success. These include curriculum and instruction, use of assessment to inform instruction, human resources, and organizational climate.

Between 2002 and 2008, Los Angeles Unified School District (LAUSD) provided formative evaluation for some of its many charter schools seeking renewal. The district's Research and Planning Division sent teams of researchers to collect documents; conduct observations in classrooms and meetings; and interview teachers, administrators, and parents. Their reports addressed such topics as charter-specific goals, quality of instruction, professional development, governance, parent relations, and student achievement. Although commissioned to inform renewal decisions, the reports concluded with a series questions and/or suggestions to promote school-level reflection and program improvement. This initiative ended due to budgetary constraints, but some of the reports are available on the LAUSD web site: http://notebook.lausd.net/portal/page?_pageid=33,102486&_dad=ptl&_schema=PTL_EP .

<u>Implications and Prospects</u>

Although commonly overshadowed by renewal evaluation and large-scale studies of student achievement, formative evaluation has a vital role to play in the development of the charter school sector. The results of large-scale studies often indicate the importance of improvement at individual charter schools. Different stakeholders at the national, state, and local levels are taking steps to use evaluation to promote improvement.

Formative evaluation is an important need for the development of charter schools and the charter school movement. Despite this need, the use of formal formative evaluation is not that common. For individual charter schools, it is a resource-intense endeavor and may be perceived as a luxury or as unaffordable. Another challenge for a charter school wanting to use formative evaluation is finding a trustworthy reviewer or evaluator.

Non-profit organizations at the federal and state levels have stepped up to meet these challenges. They are charter-friendly organizations providing tools and processes for making use of formative evaluation, while also having a commitment to providing trustworthy reviewers and keeping costs manageable. Their leadership is laying an important foundation for building the quality of charter schools. The US Department of Education Office of Innovation and Improvement has funded both the BCSQ and NACSA initiatives, thus making a potentially profound investment in the future of school reform.

Formative evaluation is risky for charter schools, especially in their early years. It involves a significant investment of time, money, and energy in a context where all are in short supply. It also opens the charter school to news it might not want to hear. Any open and honest review—even if a self-evaluation—will identify areas requiring attention. With a charter school's survival and growth often depending on the perception of parents, teachers, and other stakeholders that the charter school is better than nearby district schools, negative findings might have dramatic impact. For a charter school, commitment to formative evaluation is both visionary and courageous.

Evaluators seeking to fill the need for formative evaluation at charter schools would be wise to consider the American Evaluation Association (2004) *Guiding Principles for Evaluators*. Of particular relevance is principle B1, relating to the evaluation team's capability to perform the project. A broad-based program evaluation of a charter school can require knowledge of curriculum and instruction, services for special populations, youth development, professional development, school reform models, governance, parent involvement, non-profit organizations, and relevant laws and policies. A full review also requires competence in accounting and school safety. Principles E1, E3, and E4 (on engaging a broad range of stakeholders, broadly disclosing all relevant results, and conflicts of interest) also present particular challenges in this context. Also, following principle C1, evaluators must be clear about the potential uses, limitations, and implications of their formative evaluation work at charter schools.

Prospects for Charter School Evaluation

Evaluation has been integral to charter reform since its inception. Chartering schools necessitate periodic renewal evaluation. Being explicitly intended to compete with traditional public schools, this reform initiative calls for large-scale comparisons of student performance. Now, almost two decades after the first charter schools opened, the potential role for evaluation continues to increase. Based on the preceding review, the following are opportunities for evaluators to improve their contribution to the growing educational-reform discussion on charter schools.

- Evaluators can improve the discussion by asking better questions. Although analytic methods are rapidly improving, useful information on charter school performance is not increasing at the same rate. Charter schools continue not to outperform traditional public schools and results for overall comparisons remain "mixed." It is time for evaluators to apply the advanced methods and increasing knowledge of charter school dynamics to questions that are more likely to provide new information. Examples of topics for such questions include characteristics of successful charter schools, conditions under which charter schools are successful, performance on student outcomes in addition to standardized test scores, and the effectiveness of specific charter-authorizing policies. On a related note, there is potential value in developing analytic techniques that can respond to specific policy and renewal questions.

- Evaluators can make important contributions to addressing the "renewal crisis." Although resolving the situation falls to legislators, authorizers, and charter school leaders, evaluators can address technical challenges. These challenges include identifying renewal criteria that are aligned with relevant legislation and practical to apply, creating rubrics to support the authorizer's movement from data collection to renewal recommendations that are both defensible and just, and analytic methods sensitive to this unique context.

- Increasing the ratio of value to cost is an important challenge for evaluators to address. Proper evaluation for renewal and/or formative purposes requires major investments of money, time, and effort by both charter schools and authorizers.

  - For renewal, evaluators can work to reduce costs through aligning oversight data collection with renewal criteria, making use of data already required by other entities (e.g., audits and student data), and guiding

authorizers to make better use of the evaluation resources. Specifically, not all schools require the same depth of renewal evaluation; greater resources should be devoted to the schools that have a possibility of receiving non-renewal recommendations.

- o Similarly, formative evaluation efforts could focus on specific areas of concern rather than the school's entire program. Also to increase the usefulness of formative work, evaluators must engage the specifics of the charter school rather than relying on tools designed to capture broad characteristics of traditional public schools. Another potentially valuable step would be evaluators teaming with education professionals to provide content knowledge for formative evaluation.

Charter schools comprise an increasingly important sector in contemporary educational reform. The eventual course of this reform initiative will be determined by many factors, including educational theory and practice, public policy, the courts, and everyday choices made by families. The best role for the evaluation profession will be to provide trustworthy information for decision making by educators, regulators, parents, policy makers, and the general public. Fulfilling this role will require steps, from design to use, that are responsive to the needs of this unique educational sector.

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