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Portfolio Management Districts and Rebuilding Inequality

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Despite over 50 years of near-constant education reform movements in the United States, most attempts at improving outcomes in urban public schools have met with “predictable failure” (Sarason, 1990). The recently coined term “Portfolio Management Models” (Bulkley, Henig, & Levin, 2010) describes a new approach to citywide governance in which the district serves as a coordinator of public education services, rather than as the single provider of these services. In New York, Chicago, Philadelphia, and New Orleans, schools may be run by a variety of groups, including national and local charter operators as well as the local or state governments. In these cases, the district functions like a financial investment adviser, readjusting the portfolio of schools in the city by authorizing promising new schools, closing low-performing ones, and regularly evaluating school performance. This model of governance, coupled with school choice and standards-based accountability policies, seems likely to ensure the end of poor-testing schools. This is an intended consequence of portfolio management, and a compelling one at that. But all changes also have unintended consequences (Fink, 2003) that may be difficult to anticipate and thus prepare for.

Previous research in post-Katrina New Orleans schools (Beabout, 2008) confirms that increased inequality is one such unintended consequence of the portfolio management model. The mechanisms by which inequality has emerged in New Orleans’ “portfolio-ized” school system include: selectivity in charter schools, pedagogical admissions requirements, uneven special education staffing, and selective marketing. Those districts currently employing portfolio models of management, and the many others that are watching from the sidelines (e.g., Detroit, Memphis) must consider the impact of increased inequality between schools if portfolio management is to avoid joining the long list of failed reforms of the past.

“Selective” Charter Schools
The vast majority of charter schools in New Orleans, although not all, are open-admission schools that do not use previous test scores or grades in making admissions decisions. There are, however, a number of ways in which these schools can mold their incoming student populations. Under portfolio management models, schools have an incentive to admit or retain those students who are likely to score highly on tests, because achievement scores are the primary data point that is used to make the high-stakes decisions on school closure or renewal (Lubienski, Gulosino, & Weitzel, 2009).

One form of selectivity is the inclusion of specific discipline policies that prohibit re-enrollment for students receiving a certain number of suspensions or other infractions during the school year. While some students may, in fact, be better served in another setting, this type of discipline policy creates a flow that directs challenging students out of charter schools and into other schools with available seats. If magnet schools and popular charter schools are already over-enrolled (which is often the case), these students are relegated to the least in-demand schools (in New Orleans, these are the state-run Recovery District schools), leading to increased inequality.

Furthermore, charter schools are often able to limit class sizes to favorable pupil-teacher ratios. When the upper limits of these ratios are reached, students are referred back to the district, which is legally obligated to place the students in a less-popular school that still has available seats. Again, this creates an outflow of students from in-demand schools to less in-demand schools. Those who lack the social capital to navigate the enrollment process (which, in New Orleans, begins in January for the following fall) are not full participants in school choice, but rather are being funneled to schools that have been picked over by other “choosers” (Goldring & Hausman, 1999).

In post-Katrina New Orleans, students returned in large numbers during the middle of the 2006-07 school year, stressing the state-run schools as class sizes ballooned and teachers were hired mid-year. Charter schools, once full, simply passed these students on. While the scale of post-Katrina return of students is not likely to be mirrored elsewhere, high levels of student mobility in other cities could approximate this same effect.

Pedagogical Admissions Requirements
An important feature of portfolio management (and school choice in general) is that schools differentiate themselves with various combinations
of scheduling, curriculum, pedagogy, and extra-curricular activities. Sometimes, this choice includes admissions preferences when students have previous experience in certain fields of study or with certain pedagogical methods. Some public schools in New Orleans give admissions preferences to those with previous foreign language or arts experience. As one charter principal informed me, “You can’t start French [immersion] in 4th grade; you gotta start in kindergarten.” Ostensibly sound student placement policies soon become segregating ones, because they erect barriers to transient families whose children may not have had exposure to the desired skills or pedagogies. These children are more likely to be poor and non-white, and so we have another mechanism for increasing inequality within the system.

Special Education
Portfolio management is predicated on the creation of new schools to replace older, low-performing ones. One of the preferred models to new school creation (used by KIPP and other charter school programs) is opening a school with only a single grade and then adding a new class of students in each subsequent year. Reasonable claims are made that a strong school culture and strong faculty-student relationships are fostered in a small school setting. These start-up schools are operating on a very small profit margin, and their budgets are often tight until the school grows to its full size. This has led to a cost-effective but discriminatory and, at times, illegal practice of full-inclusion special education as the only approach offered by schools.

According to The New Orleans Parents’ Guide to Public Schools (2010), only 8 of the 90 public schools in New Orleans list something other than “inclusion” as their model of special education. While the delivery of services surely varies in quality among these schools, this heavy emphasis on inclusion raises questions about whether this model was chosen because it is the cheapest, because it best meets the needs of many students, or because it serves to let students with significant disabilities know that they’re unwanted. There is little in terms of systemwide oversight to ensure that services are being delivered in the most appropriate setting. Students with severe disabilities face serious challenges, as full-inclusion schools become the norm. A charter school principal was quoted by the Times-Picayune as saying:

We did have a parent who came in and she has a child with autism, and I did speak personally with this lady and I told her we did not have an autistic class on the site and we did not have a teacher for autism, and I told her to please fill out an application for next year. I directed her to the [Recovery District]. When you don’t have that teacher and that class set up and we’re in February or March, I believe it would be a disservice to the child to bring them in a classroom and then not have a teacher who could serve the needs of that child. (Rita, 2007, np)

Certainly, the families of those students whose disabilities make spending a full day in a regular classroom difficult might feel subtly pressured to enroll elsewhere. Another report published by the Times-Picayune (Carr, 2008) told the story of a mother who decided to home-school her autistic son after being turned away from a number of schools, both charters and non-charters. The high cost of providing special education services and the small profit margins of independently run schools put portfolio management and the federal IDEA legislation on a collision course.

Selective Marketing
While most schools in New Orleans do not have test-based admissions policies, the decentralized system encourages schools to market themselves to particular segments of the community to ensure continued enrollments (Lubienski, 2007). In a study of 10 public school principals in New Orleans (Beabout, 2008), one school sought to market itself to a predominantly white and middle-class neighborhood, while another actively sought to bring in low-income students of color. In both cases, the schools are actively marketing themselves to a particular type of student and a particular segment of the community. In this way, public schools no longer serve the integrative function (reminiscent of the common school movement of the 1800s), but exist to serve “this type” of student and not “that type” of student. In an already segregated American social milieu, this type of marketing could exacerbate existing racial and economic divides. In districts where portfolio management has been nurtured (e.g., New York City, Philadelphia, Chicago, New Orleans), most middle-class families left the public school system years ago, except for small enclaves that sent their children to magnet or selective schools. Districts adopting a portfolio management approach could find a further erosion of whatever social cohesion function that urban public schools still provide (Levin, 2010). Choice has the potential to reinvigorate urban public schools (Meier, 2002), but it also has the potential to segregate society even further.

Conclusion
We should continue to ask questions about who benefits and who is harmed when portfolio districts cease operating schools directly, but outsource this task to self-motivated independent operators. When push comes to shove, these operators are responsible for their school, but not for the one down the block. It seems appropriate to call the historical tendency toward inequality a “strange attractor” of urban school systems (Morrison, 2002; Wheatley, 1999). Recognizing and confronting this natural tendency of urban schools may be an important first step to designing systems (portfolio management or otherwise) that can counteract the inherent forces of inequality in urban school systems throughout the United States.
References

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The Association for Childhood Education International (ACEI) seeks an Associate Editor for the Journal of Research in Childhood Education (JRCE). ACEI seeks a highly respected education researcher for this position, which will be a volunteer, professional appointment within the field. The Associate Editor would serve a three-year term, with the understanding that he/she would then take over the Editor position (for a job description of the Editor position, contact the ACEI Director of Publications at abauer@acei.org).

JRCE is a scholarly journal in education research, now in its 25th year of publication. Owned by ACEI and published quarterly by Routledge, the Journal features articles that advance knowledge and theory of the education of children, infancy through early adolescence. The journal provides an outlet for reports of empirical research, theoretical articles, ethnographic and case studies, participant observation studies, and studies deriving data collected from naturalistic settings. Particular interest is given to cross-cultural studies and those addressing international concerns.

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Tenure: The Editor will be named by January 1, 2012 to begin work for Vol. 27 (2013) and Vol. 28 (2014).

Application Procedures: Applicants must submit an electronic application package, containing the following: a) a letter of application that explains the reasons the applicant wishes to undertake this responsibility; b) a letter from the applicant’s employer outlining provisions that can be made to permit time for the successful completion of duties of the Editor; c) a statement of the relationship between the applicant’s credentials and the qualifications stated for the position; d) a current vita; e) a statement of philosophy regarding the focus of the Journal of Research in Childhood Education; f) three letters of recommendation from individuals who can speak to the applicant’s capabilities for this position; and g) samples of the applicant’s published works. Applications must be submitted by September 1, 2011. Address all applications and inquiries to: Anne Bauer, Association for Childhood Education International; abauer@acei.org; 301-570-2111.