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Hirschman's voice, exit, and loyalty framework in the context of charter schools and secession: a discourse analysis of Indiana newspaper editorial items, 1990 to 2014.

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HIRSCHMAN'S VOICE, EXIT, AND LOYALTY FRAMEWORK IN THE
CONTEXT OF CHARTER SCHOOLS AND SECESSION: A DISCOURSE
ANALYSIS OF INDIANA NEWSPAPER EDITORIAL ITEMS, 1990 TO 2014

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A Dissertation Approved on

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ABSTRACT

HIRSCHMAN'S VOICE, EXIT, AND LOYALTY FRAMEWORK IN THE CONTEXT

OF CHARTER SCHOOLS AND SECESSION: A DISCOURSE ANALYSIS OF

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In this study, I apply secession to Hirschman's (1970) classic framework to develop a notion of charter school secession. I build beyond his constructs, which I define as $Voice_1$, $Exit_1$, and $Loyalty_{District}$ in the case of dissatisfaction with traditional school governance, to explore whether there is a rhetorically discernible "battle" in Indiana's charter school development such that actors: (1) have a crisis of legitimacy (claim) against the local school or district ($Voice_2$); (2) seek to leverage charter school formation as the mechanism to withdraw and establish independence ($Exit_2$); *and* (3) defend their efforts due to allegiance to the charter school mode of governance ($Loyalty_{CharterSchools}$). I investigate this conceptualization in community newspapers' editorial discourse related to charter schools. Analysis of 1,245 editorial page items spanning 25 years across 40 Indiana newspapers reveals four sets of reactions along the two guiding themes of charter school formation and secession: secession (using charter school and non-charter school forms) and loyalty (to charter schools or districts/district schools). This process further exposed two notable cases related to secession though neither match the conceptualization of charter school secession.

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CHAPTER 1: INTRODUCTION

Secession is often conceived in nation-state contexts; however, smaller-scale, local secession continually (re)shapes the geopolitical landscape, particularly the delivery of public education (Murray 2009). This dissertation considers one significantly underexplored manifestation of secession in the United States—in charter school contexts. Charter schools are presented as institutional hybrids "deliberately designed to straddle the public and private sectors" in the delivery of public education (Henig and MacDonald 2002: 963). This hybrid nature reflects charter schools' dual orientation and responsiveness to both political *and* market goals, norms, and incentives (Henig et al. 2003: 43). Charter schools emerged in the 1990s as an alternative pathway—an exit— from governance by traditional local school districts. As the term "secession" continues to emerge in public education contexts, however, it is worthwhile to ask: Does charter school development reflect secession? If so, how?

In the following chapters, I apply secession to Hirschman's (1970) hypothesis on consumer choices when facing lazy monopolies. I build beyond his constructs, which I define as $Voice_1$, $Exit_1$, and $Loyalty_{District}$ in the case of dissatisfaction with traditional school governance, to establish a novel conceptualization of *charter school secession*, or the intersection of charter school formation and secession. After developing this conceptual framework in detail, I explore whether and how secession manifests in community newspapers' editorial discourse related to Indiana's charter schools. Specifically, I consider whether there is a rhetorically discernable "battle" in Indiana's

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charter school development such that actors: (1) have a crisis of legitimacy (claim) against the local school district (Voice$_2$); (2) seek to leverage charter school formation as the institutional mechanism to withdraw from the local school district and establish independence (Exit$_2$); *and* (3) defend their efforts due to allegiance to the charter school mode of governance (Loyalty$_{CharterSchools}$).

Analysis of 1,245 editorial newspaper items spanning 40 newspapers and 25 years reveals four sets of reactions along the two guiding themes of charter school formation and secession: secession (using charter school and non-charter school forms) and loyalty (to charter schools or districts/district schools). This process further revealed two notable cases related to secession, though neither match the initial conceptualization of charter school secession developed in the first part of the dissertation. The project concludes with a list of future research directions.

Problem Statement

The term "secession" has recently emerged in news media related to multiple education-related contexts: secession from the school district (e.g., Reeves 2018, Strauss 2018, Bloomfield 2019, Felton 2019), secession via charter school formation (e.g. Guo 2015), and even municipal secession to form new charter schools (e.g., Cline 2018) or district schools (e.g., Harris 2019). One state department of education has explicitly addressed the notion of secession in charter school contexts.[1] However, it is not clear

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[1] As stated in a document on the Alaska Department of Education and Early Development's website (State of Alaska n.d.), the specific question was "Can an existing public school use the Charter School Act to secede from a school district?" The answer was "No. A charter school is a public school and operates under contract to the local school board." The state's response fails to address the notion of secession directly or consider whether a group of actors—not a school—could use the charter school form to secede from a school district.

whether principal charter school actors use the explicit term "secession" to describe their separatist pursuits or if the concept of secession applies uniformly across each institutional form. Linking the term "secession"—negatively or positively—with these formations warrants further conceptual consideration and empirical exploration. This dissertation considers whether and how the concept of secession manifests in one form: charter schools.

Central Research Questions

This project considers three questions. The first is a conceptual one that requires the application of both secession theory and the organizational development of charter schools. The response, developed in Chapter 2, is the foundation of the other questions that consider the interplay of secession and charter schools using community-level perspectives reflected in Indiana's newspapers. The specific research questions are:

1. What is charter school secession?

2. Does Indiana newspaper editorial page rhetoric reflect charter school secession?

3. If so, how?

Conceptualizing the Intersection of Charter Schools and Secession

This dissertation engages the public governance landscape upon the introduction of charter schools[2] alongside existing traditional public school districts (TPSDs). It

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[2] Under Indiana Code Article 20-24, charter schools are public schools that operate under a charter entered between the school and its authorizer. According to IC 20-24-2-1, they may be established "to provide innovative and autonomous programs" that "(1) Serve the different learning styles and needs of public school students. (2) Offer public school students appropriate and innovative choices. (3) Provide varied opportunities for professional educators. (4) Allow public schools freedom and flexibility in exchange for exceptional levels of accountability. (5) Provide parents, students, community members, and local entities with an expanded opportunity for involvement in the public school system."

considers a public-from-public (due to public funds) form of secession legitimized through charter school legislation. As I explore throughout this dissertation, key differences—and the perceptions of such differences—regarding the TPSD and charter school modes of governance are the foundation of an inquiry into charter school secession.

Charter schools are a "discrete entity" (Brouillette 2002: 4) "outside the normal school district hierarchy" that "exist as individual communities in their own right" (Brouillette 2002: 38). The ensuing battle between supporters of TPSDs versus charter schools over finite territory (fixed capital), tax dollars (financial capital), and/or high-performing students (social capital) results in advocates and opponents from all sides working to ensure their control over public resources. The embattled communities—and the discourse related to contested educational space and resources within them—emerge as sites to explore whether actors seek to use charter school formation as a means of both breaking from the TPSD and then forming a new public governing apparatus.

Focusing on the local political dynamics and interplay between and among those who support TPSDs (TPSD loyalists) and those who support charter schools (charter school loyalists) is expected to reveal a range of bargaining processes—including secession or its preconditions, if applicable—affecting local education reform. Thus, the politics, governance, and perception of local public education is central to this study. Although the driving force behind charter school legislation and development may come from state and national policy networks (Mintrom 2000, Cookson and Berger 2002, Kirst 2007), the response is local. Further, "[i]t is at the local level that crucial support for

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reform is built, resistance mounted, and conflicts over education worked out" (Stone 1998: 2).

In Figure 1, I present a 2x2 framework that guided my initial conceptual understanding of the community-level nexus between secession, on the one hand, and charter school formation and development, on the other.[3] Absent both secession and charter school formation (Cell #4), local discourse would be expected to maintain the *status quo* ideal type: dominant loyalty to the TPSD mode of governance and its organizational reform processes and no evidence of efforts to secede from it. When faced with the prospect of charter schools (either through legislative adoption or school creation), however, district loyalists are expected to focus on district *integration* efforts. These may include anti-charter school rhetoric and structural efforts to thwart charter school legislation, implementation, and growth. I consider this the starting point of my conceptual analysis and view it as the opposite of the notion of charter school secession. Such conceptual polarization aligns with Wood's (1981: 111) definition of secession, which "can best be understood as the antithesis or the reversal of political integration."

As further developed in Chapter 2, this study is particularly concerned with understanding the dynamics of Cell #1, or the intersection of how charter school formation (Cell #3) *combines with* the notion of secession. In my conceptualization, those pursuing charter school secession use charter school market entry (forming a charter school) as a reaction to dissatisfaction with the local TPSD (as a school or TPSD governance more broadly). At peak dialogue, these actors may be so aggrieved, in

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[3] The three comparative factors—Voice, Exit, and Loyalty—are discussed in greater detail in Chapter 2.

tandem with other local conditions and their allegiance to principles of the charter school model, that they may make an explicit threat of charter school exit as a means of becoming independent from the local district (*disintegration*). As secession is a contested act—a divorce (Buchanan 1991a), an annulment, a renunciation of the State's legitimacy (Gauthier 1994: 359), or an effort to breakdown the State (Buchanan 2013), resistance from local and/or state actors who seek to maintain district integration is expected.

While it may seem that actors in Cells #1 and #3, drawing from Wood (1981: 111), "withdraw their loyalties, expectations, and political activities from a jurisdictional centre and focus them on a centre of their own," a key distinction is on the *secessionist claim* and struggle for independence from the TPSD. Formation (Cell #3), while still a form of exit, does not reflect a secessionist claim or necessarily reflect a local struggle. Whether and how this notion of charter school secession manifests at the community level is key to this study.

The last ideal type in this 2x2 conceptual framework is what I label "Non-Charter School Secession," or the possibility of public educational secession via a non-charter school institutional form. This may take the form of, among other possibilities, a new local school district (i.e., district-level secession), switch to mayoral control of education, or the creation of a new city in order to create a new district.

Figure 1: Conceptualization of Secession and Charter School Formation in Public Education Governance, 2 x 2

		CHARTER SCHOOL FORMATION	
		YES	NO
SECESSION	YES	**CELL #1:** **Charter School Secession** **(Charter School Formation + Secession)** ● **VOICE**: Crisis of legitimacy regarding local school model; may make explicit threat of charter school exit. ● **EXIT**: Charter school creation as means of transferring independence away from district. Met with local and/or state resistance. ● **LOYALTY**: <u>charter school model</u>	**CELL #2:** **Non-Charter School Secession** ● **VOICE:** Crisis of legitimacy regarding local school model; may make explicit claim or threat of non-charter school exit. ● **EXIT:** Non-charter school formation exit is considered the means of transferring independence away from district. Met with local and/or state resistance. ● **LOYALTY:** <u>non-charter school model</u>
	NO	**CELL #3:** **Charter School Formation** ● **VOICE:** May emphasize similarity or superiority of charter school model vis-à-vis local school model. View charter schools as legitimate, legal, and viable. ● **EXIT**: Support for charter school legislation (state level) and/or intent to form charter school (local level). ● **LOYALTY**: <u>charter school model</u>	**CELL #4:** **Status Quo** ● **VOICE**: Minimal or no discernable frustrations regarding the local school model. May take form of *anti-charter school* rhetoric. ● **EXIT**: No attempt to move. Focus on structural unification efforts. ● **LOYALTY**: <u>local school district model</u>

* * *

In the remainder of this chapter, I briefly introduce charter schools and outline key assumptions of secession that undergird the project. I discuss the study's significance and boundaries, addressing, in particular, charter school secession's nexus with the field of urban and public affairs. I conclude with a preview of the rest of the dissertation.

Charter Schools Disperse Public Education Governance

The charter school model emerged in the United States in the early 1990s and has remained in place since. As of 2019, 45 states and the District of Columbia have charter

school laws (Education Commission of the States, 2020). During the 2016-17 academic year, approximately 3.1 million students (6 percent of all U.S. students) enrolled in more than 6,900 charter schools (National Alliance for Public Charter Schools 2017). Ray Budde (1988: 13, 16) initially proposed the charter school "experiment" in the 1970s, noting that "significant changes" were needed as the U.S. public education system was facing a "losing battle in the world economic marketplace." The battle to reform, he stated, would be waged once "the local school district—where teaching and learning actually take place—is organized in a substantially new and different way" (Budde 1988: 16). He proposed that small groups of teachers "be given 'charters' by their local school boards to explore innovative pedagogical techniques" (Renzulli & Roscigno 2005: 345), but the proposal was not initially embraced: "[N]o one felt that things were so bad that the system itself needed to be changed" (Budde 1996).

The sentiment changed in 1988 when teacher union leader Albert Shanker called for charter reorganization of local public school districts (Cookson and Berger 2002: 33). At the national convention of the American Federation of Teachers, Shanker proposed "that local school boards and unions jointly develop a procedure that would enable teams of teachers and others to submit and implement proposals to set up their own autonomous public schools *within their school buildings*" (Budde 1996: 72, *emphasis added*). To Shanker, these schools, established through a charter contract, "would become places where teachers would be recognized as experts" and "inspire reform from the inside" (Cookson & Berger 2002: 33). Shanker argued that, "freed from traditional bureaucratic restraints" in their operations, charter schools could empower teachers, desegregate students, and promote innovation that would spur growth within traditional schools

(Kahlenberg & Potter 2015). Budde's 1988 report "Education by Charter" outlined his vision on how charter schools would work.

However, the charter school movement has changed dramatically since Budde's and Shanker's founding visions. Kolderie (1998: 4) said the shift occurred once the movement adopted a "new state strategy for system-change" in which state legislatures widened the public education marketplace, thereby "open(ing) the way for some public body other than the local board to offer public education in the community." This dispersed the governance of public education into two forms: the traditional model accountable to the local TPSD board and the charter model accountable to a state-approved charter school authorizer. These authorizers are "gatekeepers" (Hassel & Vergari 1999: 406) that determine who receives a charter, monitors, and holds the charter schools accountable to terms laid out in the charter contract. While some charter schools are accountable to the local school district (District Charter Schools) and governed by a district charter school board, others are accountable to and governed by independent authorizers (Independent Charter Schools) (Baker 2016). These state-approved authorizers include non-district forms such as a mayor (e.g., Indianapolis), university, state charter board, or privately funded and operated entities (e.g., private university).

Today, given this nature of dispersed governance, creation of charter schools is often viewed as a direct challenge to the authority of TPSDs, with support for one model over the other framed along an "us" versus "them" narrative or pro/con advocacy network (Mintrom 2000, Kirst 2007, Ertas 2015). Charter schools today are primarily housed as free-standing schools, either converting from oversight by TPSD or starting anew. Furthering the divide is that charter schools, in many respects, resemble traditional

public schools. Both use public funds, have open enrollment, cannot charge tuition, and cannot discriminate, *prima facie*, based on disability, race, color, gender, national origin, or religion (though these points are often challenged). Charters must also abide by health and safety regulations, special education requirements, and the separation of church and state (Bulkley 2005: 529).

On the other hand, charter schools are part of the "school choice" options available to students (and their families) interested in pursuing *alternative* forms of public education than their assigned TPSD school. The charter school model is unique among choice options (Renzulli 2005: 2, Renzulli et al. 2015: 83) as it allows local laypeople— including parents and teachers—to reform, design, organize, and implement public education directly. Further, it allows applicants the opportunity to find an authorizer *of choice* as they exit the governing authority of the local public district. Thus, the model, particularly compared to the TPSD system, "emphasizes individualism and promotes a maverick sensibility" (Cookson & Berger 2002: 1).

The charter school model has changed significantly over time, arguably to a point that Budde and Shanker "would not recognize" (Abrams 2019: 908). Shanker, for example, turned his back on the charter school movement once it developed "unintended consequences" such as the development of a commercial network of charter school management, propensity to circumvent teacher unions, screening of motivated parent contracts associated with charter school student enrollment, and chartering organizations that blurred the lines with religion (Abrams 2019: 908). Such consequences, critics argued, were the "critical first step toward dismantling the troubled public education system" (Cookson & Berger 2002: 35). According to Abrams (2019: 908), "Budde never

intended an alternative to public education and long opposed the notion that charter schools should serve that purpose."

The Need for Community-Level Perspectives of Charter School Formation Vis-à-Vis District Schools

Charter school development spread rapidly across the U.S. following the first charter school's opening in 1992 (Mintrom 2000). However, exploring the local political conditions under which charter schools form and the ensuing relationship between charters schools and their local districts is an area ripe for research.[4] Kirst (2007: 186) noted: "Each specific type of charter school generates different political activities, resulting in a veritable spice cabinet of complex political interactions." Given states' domain over public education, these complex interactions include a variety of actors and responses to local, state, and federal education activities. This study considers whether secession is one of those responses.

Scholarship focuses heavily on how state and supra-state actors respond internally and externally to the charter school proliferation (Kirst 2007: 190), including studies on how the strength and weaknesses of charter school laws impacts charter school formation (e.g., Witte et al. 2003, Stoddard & Corcoran 2008). State charter laws are influenced by the Federal Charter School Program[5], which allows the U.S. Secretary of Education to award grants to state education agencies on a competitive basis to help plan, design, and implement new charter schools. This federal intervention "immediately changed the tenor

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[4] See Cookson and Berger 2002: 60-61, Renzulli 2005, Kirst 2007, and Johnston 2015 for more on local political conditions.
[5] The FCSP was proposed in 1993 by President Bill Clinton and established in 1994 as Title X, Part C to the reauthorization of the 1965 Elementary and Secondary Education Act (Cookson and Berger 2002: 47).

of the (charter school) movement" and obligated grant recipients to comply with federal regulations (Cookson & Berger 2002: 48). Further, it funneled funds through states, which encouraged state legislatures to remove caps on the number of charter school created and encourage charter school development in attempts to compete for funds.

This study is part of scholarship interested in exploring the notion of secession at the local level and how specific power struggles play out during charter school development. As noted in Chapter 3, studies heavily consider the organizational differences between the two education models, focusing on differing impacts on individual student achievement and enrollment decisions or school-level impacts to teachers, administrators, and curriculum. This overlooks a systems-level (Plank & Sykes 1999), place-based analysis of charter school formation's perceived impact within the local community (Renzulli 2005).

Given the variation of charter school missions (Henig et al. 2005), the communities in which they form, and how states define charter schools (Renzulli and Evans 2005: 398), "there is no cohesive state or local school pattern, given the variations in charter schools and their contexts" (Kirst 2007: 184). To explore if secession is part of the formation process, this study is designed to explore the "patchwork pattern" (Kirst 2007) of development at the local level. This study focuses on ground-level perspectives regarding charter schools that emerge in public forums (i.e., newspaper editorial pages) to better understand the exposed contextual political, economic, and community factors in Indiana's charter school formation and development history. The supposition is that examining this dialogue will allow instances of charter school secession—or factors contributing to it—to emerge.

Secession, Defined, and Key Assumptions

Secession is the mechanism by which an alienated group seeks to break the offending governing State structures and form new ones (Buchanan 2013). Wood (1981: 112) likened secession to fission and fusion, while Hirschman (1978) only called it fission. I engage what Buchanan and Faith (1987: 1023) labeled "internal exit," or "the form of secession by a coalition of people from an existing political unit along with the establishment of a new political unit that will then provide public goods to those who defect from the original unit." Though case-specific, the secessionist aim is often to gain independence, a special degree of political autonomy, or sovereignty in a new state (Aronovitch 2000: 29, see also Haverland 2000: 354).[6] The political means by which secession occurs is by dividing both place (fixed territory) and space (governance) between two actors. Thus, secession is ultimately a story of two actors—the seceding group's efforts to withdraw ("us") from a State ("them") and the parent State's reaction. *Secessionism*, or the bargaining process between the seceding group and the response from the State, becomes a critical point of inquiry for this project. The *secessionist outcome* is the result of a secession attempt.

Definitions of secession are generally divided into two schools of thought: those that emphasize the seceding group's moral, ethical, or constitutional rights over the State or vice versa (Pavković 2012). Restrictive definitions largely focus on the status and integrity of the Parent state opposing and/or following a secession attempt and whether

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[6] According to Buchanan (1991b: 326), "The secessionist's primary goal is not to overthrow the existing government, nor to make fundamental constitutional, economic, or sociopolitical changes within the existing state. Instead, she wishes to restrict the jurisdiction of the state in question so as not to include her own group and the territory it occupies."

the seceding group secured State consent from the non-seceding part to pursue separation (e.g., Hechter's 1992: 277 "pure secession"). According to these restrictive definitions, there are only a few genuine secessions in history and, thus, scholarship need not even dwell on it (Pavković 2012: 2).

This study leverages a broader, permissive understanding of secession to explore the nature of secession in charter school contexts. Permissive understandings focus on secession as *dis*tintegration (Wood 1981) or the "withdrawal of territory from an existing state which results in the creation of a new state" (Pavković 2012: 1). Further, how the "claim to independent sovereign status" (Wood 1981: 110) is made, how the exit is transferred (Pavković 2012: 8), and the proposed new State's ability to function in the supra-State community (Ker-Lindsay 2017) become focal research points. Thus, the claim for the withdrawal, the nature of the withdrawal, and the groups' attachment to territory (space and place) become critical secession components.

* * *

There are several critical assumptions of secession that guide this dissertation. First, secession assumes that the seceding group *chooses* to withdraw (Bishai 2004). (Whether groups have a *right* to secede is beyond the scope of this study.[7]) Second, secession from the TPSD is centered on a *crisis event* during which the seceding group perceives conflict to be irresolvable and unable to be handled through other grief amelioration strategies. This may be met with efforts from the State (local TPSD or state education) to minimize the secession attempt (see Anderson 2004, Hechter 1992 for more

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[7] Rights are generally grouped into two camps: those who consider a primary right of secession for any reason (*choice theory*) and those who emphasize that secession is pursued by groups based on perceived injustices (*just cause* or *remedial right* theory) (Buchanan 1991b, 1997, 2013).

on State bargaining). Third, secession results in a gain for the group by shifting sovereignty from the TPSD to the charter school. Drawing from Hechter (1992), the calculus of successful secession reflects the seceding group's collective decision to withdraw from the district, while local TPSD leaders concurrently decide that the overall group of the ceding group is negative. Lastly, loyalty to place ensures that the seceding group will seek secession as the means to redraw boundaries instead of simply moving out of the State's territorial boundaries. Thus, the magnitude of motivation to leave the State and transfer sovereignty to a more congenial political authority via secession outweighs the cost of individual or group exit and is considered the most attractive approach to address the claim against the TPSD.

Secession in Non-Nation-State Contexts

This study pushes beyond secession scholarship oriented on the nation-state to consider cases *already underway* in local U.S. educational settings. Parsing the definition of secession and briefly tracing its usage across time illustrates how secession can apply to the case of public education. Etymologically, the term "secession" can be traced to its Latin roots (Livingston 1998b), with "se" a reflexive (Bishai 1999: 25) and "cedere" meaning "to go." This usage—"to go apart" or "to withdraw"—has historically had wide application, ranging from the political, such as during the Early Roman Republic, to the religious, including the formation of the Anglican Church.

The Roman example is especially instructive—and referenced throughout the dissertation—as a model of how the *threat* of secession can be leveraged to enact fundamental political changes. I follow Morey's (1900) account of the *secessio plebis* ("withdrawal of the commoners") that occurred during the internal historical

development of the Early Roman Republic. According to Morey's (1900: 54) account of the "First Secession of the Plebeians" of 494 BC, the plebeians left the army and their farms and seceded to Mons Sacer in demand of relief from "the harsh law of debt" (in which they were indebted again to the patricians after just serving them during war) and the "unequal division of public land." They viewed these economic and social conditions as unjust limitations placed on them by the patrician elite and sent demands to Rome that they would cut themselves out of the Republic and "form an independent city" if their demands were not met (Morey 1900: 55).

In response, the patricians abolished debts and established the Tribune of the Plebs which allowed the plebs to elect a leader to the Patrician Magistrate to safeguard against future infringements. The *threat* and *act* of seceding, then, were tactics for the plebeians to secure more power and protections from the elite patrician class. In this context, "secession" connoted an initial plebian intent to withdraw and build anew. For the patricians, concessions were part of a State decentralization strategy to bring the plebeians "back in" and minimize the consequences of secession. However, the process of decentralization itself, according to Wood (1981: 119) suggest a loss of State legitimacy which "whets, rather than satisfies, the secessionist appetite."

The term "secession" emerged in political and non-political contexts beginning in the mid-1600s (Bishai 2004: 18). It was "used specifically" in religious contexts, as in the secession of the "Church, King and Kingdom of England from the Papacy" (Bishai 2004: 18) and when a group of "seceders" left the Church of Scotland in 1733 and established the "Secession Church," a self-governing religious and, later, self-governing political community (Livingston 1998a: 1-2). As defined in Samuel Johnson's 1755 *Dictionary*,

the verb "to secede" applied broadly: it "could speak of the soul seceding from the body; or of seceding from one room of a building to another; or of seceding from any sort of human fellowship" (qtd. in Livingston 1998a: 1). These examples illustrate how "secession" reflected a fundamental transfer of State sovereignty (from the papacy to the king and from one religious form to another). Further, these examples illustrate the flexibility by which secession can be applied.

While some critics bemoan that secession is not feasible in the U.S. context or would require "long-term political refocusing" (Alperovitz 2005), this dissertation considers whether such political restructuring is already underway in charter school formation contexts. Accordingly, the question at hand is: Can secession be understood in the case of a state's charter school development? The very idea of secession is woven throughout the fabric of U.S. history and continues to manifest at all levels of government. At the municipal level, secession can appear as "deannexation" efforts to remove neighborhoods from the city's core, often fueled by the sentiment that City Hall overlooks certain areas or fails to deliver proper services. From city-to-city secessions, particularly the case of San Fernando Valley attempting to secede from Los Angeles, are of interest to scholars.[8] The "lost" 1784 state of Franklin was perhaps the first from state-to-state secession attempt in the country[9] with more state fragmentation attempts emerging during the country's westward expansion in the 1800s.

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[8] For example, see Box and Musso 2004; Connor 2013; Faught 2006; Haselhoff 2002; Sonenshein and Hogen-Esch 2006.
[9] Delegates from several North Carolina counties unanimously declared their lands to be independent of North Carolina; the proposed area was intended to be the 14th state under the Articles of the Confederation. See Barksdale 2009.

In the 1940s, there were repeated calls for southwestern Oregon and northern California to create the 51st State of Jefferson because rural residents felt they were being ignored by urban political leaders. Despite the effort's failure, "Welcome to Jefferson" signs are still visible and the local NPR station continues to feature the movement (Anderson 2015, Branan 2015). More recently, there have been serious efforts to break up New York state[10] due to conflicts over tax redistribution or for New York City to secede ("Nexit")[11] from the United States. Serious ballot initiatives to split up or break California ("CalExit"), Colorado, and Texas ("Texit") off from the U.S. entirely continue to emerge. Of course, nationalist secession attempts from Canada, Scotland, Spain, and the European Union ("Brexit") continue to dominate media. While the United Kingdom left the EU on January 30, 2020, the other secession attempts are taken seriously in discourse despite failure to result in successful secessions.

Significance/Goal of Study

The primary aim of this exploratory study is to consider, from conceptual and applied perspectives, Hirschman's voice, exit, and loyalty framework at the nexus of secession and charter schools. While viewing charter schools through the lens of secession may be both (il)logical and (not) evident, there is a paucity of research granted to it. This project probes at the expanding body of secession research that fails to consider educational secession and charter school studies that fail to consider secessionist impulses as a possible factor driving local markets. It supports much-needed conceptual

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[10] According to Campbell (2019), New York legislators have introduced legislation to split the state or gauge public support for it in 24 of the past 28 years.
[11] For example, see Strausbaugh 2016.

research related to secession (called for by Wood 1981 and Sambanis 2006) in an area beyond the nation-state (called for by Ker-Lindsay 2017), notably in the context of governance of public education in the U.S.

This study ultimately considers whether the notion of *charter school secession* can be inferred through discourse analysis; others may and should consider alternative methodological approaches to analyze the phenomenon. My analysis, using both discursive and dispositive data, relies on a unique collection of editorial newspaper items drawn from 40 Indiana newspapers to expose contextual political, economic, and community factors contributing to Indiana's charter school development. Careful analysis of these items considers how secession components combine and, in particular instances, manifest. The systematic framework developed here may prove useful for others interested in Hirschman's framework or educational secession, or both.

While topics of secession and charter schools remain controversial in the U.S., both have garnered bipartisan support, are a focus of state and national policy conversations, and are exceedingly relevant to future policy making. Further, support for both secession (e.g., Muskal 2014) and charter schools are on the rise, despite findings in a PDK/Gallup poll that indicated 48 percent of Americans were unaware that charter schools were public and "most Americans misunderstand charter schools" (Bushaw & Calderon 2014: 19). Given the often-misunderstood nature of both secession and charter schools, it is perhaps unsurprising that secession in charter school contexts is under-researched. This exploratory study therefore becomes a fruitful starting point to expand research in an area of increasing interest to scholars and the general public.

Overall, the lasting impact of this study is to provide a conceptual framework to better understand the term "charter school secession," particularly in the case of Indiana's charter school development history. In so doing, this dissertation seeks to contribute toward a growing effort to establish a local "coherent, systematic way of analyzing the origins of secession, the conditions which make it succeed or fail, or the consequences of various secessionist strategies or governmental responses" (Wood 1981: 107).

Charter Schools, Secession, and the Nexus with Urban and Public Affairs

Drawing on insights from the urban and public affairs tradition to explore the intersection of charter schools and secession is instructive in several ways. Both traditions: deal with group seclusion (or exclusion), consider conflicts in metropolitan space, are concerned with the intermingling of public-private power and partnerships, and operate in accordance with higher levels of governments and policy. Each intersection point is considered briefly below.

A trend in urban scholarship at the turn of the 21st century has focused on "an eruption of territorializing gated 'communities' eager to secede from the formal urban political arena" (MacLeod 2011: 2631). This may stem, in part, from an "American ethos of local independence and home rule" (Bischoff 2008). It may also reflect an increasing propensity for groups to create a new governing apparatus to protect their own "community" interests by excluding others (Dear 2003). Gated communities, for example, leverage a "spirit of exclusion" using restrictive covenants to protect and encourage uniformity among residents (Axhausen 2000: 1854). These "common-interest developments" have altered the idea of citizenship such that "one's duties consist of satisfying one's obligation to private property" rather than the common good (McKenzie

1994: 196).[12] In Chapter 3, I discuss how "homevoters" focused on protecting their largest property asset become politically engaged in educational governance to counter risks that might diminish their home value (Fischel 2001). Such engagement may include efforts to form charter schools as a means of redrawing political education boundaries to protect their property. Whether this reflects secession is the key inquiry of this study.

Second, urban issues necessarily require an understanding of the suburbs and urban periphery (Gainsborough 2001, Keil & Addie 2015). Approximately 38.5 percent of Americans live in the suburbs, while 27.4 percent live in cities (Johnson & Shifferd 2016: 33). Charter schools are located dominantly in metropolitan areas (Gulosino & Lubienski 2011). While a variety of factors affect the locational decisions of charter schools, part of the policy narrative (Ertas 2015) is that urban schools (in which poor and minority students are disproportionately educated) are failing (Tyack & Cuban 1995, Stone 1998), and charter schools introduce "choice" to trapped urban students. As discussed further in Chapter 3, evidence also suggests how gentrifiers use charter schools as an economic development strategy to bring families back to the city.

Third, as Henig et al. (2003: 38) noted, the urban tradition "has long recognized" how public and private power, interests, and partnerships inevitably intermingle (e.g., Stone 1989). Charter schools, which bridge both the public and private spheres, may benefit from urban and public affairs insights, particularly Hirschman's framework regarding organizational decline. Further, public school districts are places— geopolitically-bound areas that capture the built environment of schools (Collins &

[12] Critics decry these exclusionary models of governance due to their "thickening" of injustice, weakening of democracy, and their propensity to encourage distributional inequalities as "normal, expected, and unavoidable consequences of urban living" (Hayward and Swanstrom 2011: 15, 17-18).

Coleman 2008: 283)—that deliver a public service: education. While a dominant orientation of urban studies is interested in globalization and supra-State politics, consideration of charter school secession may help expose a new type of urban social movements—so-called "threats from the inside."

Lastly, both charter schools and U.S. urban policies are creatures of the state and respond and react to state's internal and external forces. Sonenshein and Hogen-Esch (2006: 468) noted that states play an often-overlooked yet critical role "in shaping political conflicts in cities." In Chapter 3, I consider how intrastate factors affect the organizational development of charter schools. In order to explore the nexus of charter schools and secession, I limit my exploration to one state: Indiana.

Boundaries and Assumptions of the Study

The underlying assumption of this study is that charter school secession can be identified, standardized, and compared by analyzing community rhetoric related to charter school development. Such analysis is expected to reveal instances of charter school secession such that actors: (1) have a claim against the local school district; (2) seek to leverage charter school formation as a mechanism to withdraw from the local school district and establish independence; and (3) defend their efforts due to loyalty to the charter school mode of public education governance.

This dissertation assumes that the explicit term "secession" is not part of public discourse and that a secession objective must therefore be evaluated by proxy.[13] This project assumes that newspaper editorial items—the unit of analysis considered in the

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[13] Whether groups associate this term with their efforts or consciously choose to ignore it is beyond the scope of the study.

second part of the dissertation—are the best medium to gauge how both local district and charter school actors view contested educational space. Though not-encompassing of the rhetoric related to charter school development in Indiana, this content-rich approach is expected to allow a range of relevant actors and their opinions to surface, including those from students, parents, teachers, and charter school proponents and opponents, and public education officials.

I also assume that the contested educational space is between two sets of actors: those seeking charter school formation and those who wish the TPSD model to remain whole. This narrow lens ignores other competing entities within and outside the district such as private, homeschool, and other organizations in the educational marketplace that pull at parents and students during their enrollment selection process. As discussed earlier, development of a charter school does not necessary reflect an act of secession. Undisputed separations, for example, are not acts of secession but rather "peaceful political agreements for legal separation" (Bishai 1999: 43, see also Aronovitch 2000: 30). Secession manifests over contested space (Buchanan 1991a, Gauthier 1994: 359).

Perhaps, in some ways, it is easier to specify what this project is not: It is not a commentary on the ideology, justifications, or intended goals of secession[14], public education[15], or charter school secession. It does not contribute to a debate on whether charter schools should exist, nor is it a study of charter school performance, accountability, transparency, or outcomes. It does not consider whether charter schools

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[14] See Aronovitch 2000, Buchanan 1991b and Sunstein 1991 for discussions on the morality and constitutionality of secession.
[15] See Smith (2003) for an overview of the ideological "struggle for the 'soul of education'" between reformists who view the market as "a ready set of solutions to clearly defined problems" versus those in the public education "establishment" who view the market as a threat to democratic values.

fulfill promises presented in rhetoric proffered at the onset of formation. Instead, this project investigates whether perspectives on charter schools within communities in Indiana reflect an underlying secessionist impulse and whether and how such discourse reflects charter school secession or its component parts. I consider these perspectives at face value and in their sociopolitical contexts.

The study leaves unanswered several important questions that are beyond its scope. For example, the research does not explore why actors pursue charter formation versus district secession or other forms of exit. While the work at hand relates to this larger debate, it is important to systematically and methodically evaluate how one aspect—charter school formation—manifests as secession. Future scholarship, as I note in Chapter 7, should explore the interconnection and disjuncture associated with multiple forms of secession.

Preview of Remaining Chapters

In Chapter 2, I consider Hirschman's voice-exit-loyalty framework in the context of charter schools to develop a conceptual understanding of charter school secession. In Chapter 3, I focus on Indiana's charter school landscape and consider the contentious "battle" between charter schools and local school districts, which invites a wide range of actors and voices, some of which may reflect secessionist claims. In Chapter 4, I describe the data and methodology to evaluate charter school secession. In Chapter 5, I discuss the findings of discourse analysis along the secession components identified in Chapter 2. In Chapter 6, I identify and discuss emergent cases and how they relate to charter school secession. Finally, Chapter 7 summarizes the conceptual and applied findings of the study and situates the project and its implications into broader policy and research contexts.

CHAPTER 2: CONCEPTUALIZING CHARTER SCHOOL SECESSION USING

HIRSCHMAN'S VOICE, EXIT, LOYALTY FRAMEWORK

Extant scholarship does not offer a clear conceptualization of secession in charter school contexts. Reasons for this omission are unclear. It could be because researchers fail "to be explicit about the model of secession they hold in their minds" (Wood 1981: 108); current conceptualizations of secession are too narrow (and outdated) (Bishai 1999, 2004); the term "secession" has pejorative connotations, particularly in U.S. contexts (Livingston 1998b: 38); interdisciplinary studies and approaches are often overlooked by siloed disciplines; or academic attention is hyper-focused on the outcomes of charter school formation rather than its development (Renzulli 2005). In this chapter, I overlay Wood's (1981) understanding of secession to Hirschman's (1970) voice-exit-loyalty framework to conceptualize one possible presentation of *charter school secession*. This offers an entry point to address the dissertation's empirical research questions.

Definition

As I develop below, ***charter school secession*** is conceptualized in this study as instances during which actors: (1) have a crisis of legitimacy (claim) against the local school district ($Voice_2$); (2) seek to leverage charter school formation as a mechanism to withdraw from the local school district and establish independence ($Exit_2$); *and* (3) defend their efforts due to allegiance ($Loyalty_{CharterSchools}$) to the charter school mode of governance. Drawing on the framing tasks of collective action (Benford and Snow 2000), those pursuing charter school secession are expected to present charter school formation

as the solution (prognostic frame) to ameliorate their grievances against the local school district (diagnostic task) and demand their withdrawal from local district governance (motivation task).

Secession Impulse

As noted in Chapter 1 (see also Figure 1), the conceptual inquiry at hand is whether *secession* manifests during charter school *formation*. In particular, I consider whether formation combines with a *secessionist impulse*, which Wood (1981: 111) noted is difficult to identify and predict. Wood (1981: 122) observed that "[t]he secessionist impulse does not occur randomly" and identified five preconditions to consider in contextual analysis that may increase the likelihood of secessionist alienation and movements: (1) geographic[16], (2) social[17], (3) economic[18], (4) political[19], and (5) psychological.[20] These impulses can build gradually or be triggered by an immediate change in between-group (secessionists versus State) dynamics (Wood 1981: 120). Thus, a secessionist movement, according to Wood's framework, is defined as an instance in which actors: seek to separate territory (Precondition 1); have a degree of group solidarity based on shared culture (Precondition 2); recognize that secession would result in greater benefit to the seceders than under their current structure (Precondition 3); perceive a

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[16] Territory need not be geographic, but it must be separable (Wood 1981: 112).

[17] This may include "a distinctive conception of community" (Buchanan 1991a: 6; see also Buchheit 1978, Wood 1981: 114). Often, this "group solidarity" is based on a common producer or consumer interest; shared history, resources (including financial, social, political, or geographic), language, religion, or other value; *and* the group's desire to self-govern based on this shared identity (Wood 1981, Hale 2000, Walter 2006).

[18] Frustrations may be attributed to economic exploitation caused by a dominant group.

[19] Chief among political preconditions is a crisis of legitimacy in which the prospective secessionists perceive a decline of State legitimacy (Wood 1981: 118, see also Siroky 2011:54).

[20] Wood (1981: 120, *emphasis added*) called this the "*emotional element* of the desire for an independent homeland on the part of the secessionists" pitted against "an equally fervent desire to preserve the union on the part of the loyalists of the larger state."

decline in State legitimacy (Precondition 4); and perceive a threat to identity

(Precondition 5).

In this exploration of a link between charter schools and secession, Precondition 1

refers to the dispersed governance between the charter school and the TPSD models of

public education co-located in the same geographic area. Preconditions 2 through 5 are

contextual and require systematic exploratory analysis, which I undertake through

discourse analysis. Because secessionist actors do not necessarily frame their movements

with "a clear goal in mind" (Huszka 2014: 1) and may not use the explicit term

"secession," I consider whether and how a secessionist *impulse* manifests in

communities' editorial discourse using an adoption of Hirschman's classic framework as

a guide.

Hirschman's Voice-Exit-Loyalty Framework

Hirschman's (1970) classic framework was based on an individual choice

between *voice* and *exit* when facing organizations with perceived decline.

> There are two main types of activist reactions to discontent with organizations to
> which one belongs or with which one does business: either to *voice* one's
> complaints, while continuing as a member or customer, in the hope of improving
> matters; or to *exit* from the organization, to take one's business elsewhere.
> (Hirschman 1978: 90)

The voice construct was presented as political and confrontational, allowing actors to

share their dissatisfaction with the organization. The assumption was that consumers

could "marshal some influence" in organizational reform by exercising voice (Hirschman

1970: 41). The exit construct, in contrast, was presented as similar to "voting with one's

feet" (Hirschman 1978: 95). Hirschman (1978: 99) noted that exit could serve as a

powerful restraint on "arbitrary government" (i.e., monopoly) but argued that Milton

Friedman's approach to "relatively neat" (Keeley & Graham 1991: 349) and efficient exit—educational vouchers to provide competition with declining public schools—was biased in favor of the economist's favor of exit *over* voice. Exit, along this line of thinking, Hirschman (1978: 95) noted, offered exit as the expression of individual dissatisfaction rather than engaging in the "'cumbersome' political process for the redress of people's grievances."

While the relationship between voice and exit is sometimes perceived as a tradeoff, Hirschman (1980: 438) noted that there is a "strong affinity" between voice and exit and many possible combinations, including complementary pairing, to express organizational dissatisfaction. Graham and Keeley (1992: 192) noted: "Exit and voice are conceptually distinct, but that does not make them mutually exclusive forms of behavior. Exit can be combined with voice, or both can be rejected, in addition to either one being chosen as a solitary response." This is a helpful point of departure to consider the relationship between secession and charter schools as both are associated with exit and voice.

In Figure 2, I illustrate how Hirschman's framework applies to actors dissatisfied with the local school district (TPSD). Their calculus to exercise voice and/or exit is based on their loyalty to the district. The more loyal one is to the district, the more likely they are to exercise voice over exit. Conversely, the less loyal they are to the district, the more likely they are exercise exit over voice.

Figure 2: Hirschman's Voice, Exit, Loyalty Framework Applied to Traditional Public School Districts

$$\text{Dissatisfaction}_{District} \rightarrow \begin{cases} \text{Loyalty}_{District}+ \rightarrow \begin{cases} \text{Voice}_1+ \\ \text{Exit}_1- \end{cases} \\ \text{Loyalty}_{District}- \rightarrow \begin{cases} \text{Voice}_1- \\ \text{Exit}_1+ \end{cases} \end{cases}$$
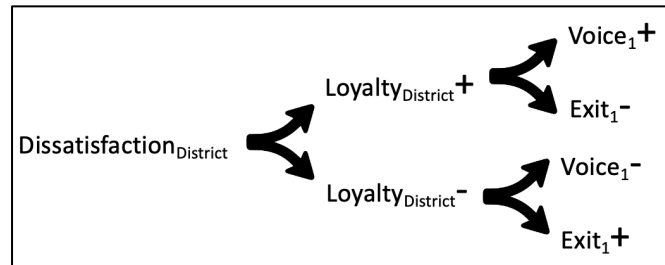
Source: Author

In Figure 3, I apply secession to the constructs of voice, exit, and loyalty and consider how secession may manifest in the context of charter schools. In this conceptualization, voice combines with a secessionist claim against the State (TPSD), while exit (via charter school formation) combines with the secessionist goal of independence. Loyalty, in this case, is to the charter school mode of governance, rather than the district. As secession is based on a bargaining process between the activist group and the host state response (Hechter 1992: 269), I also include how the process may unfold between the TPSD and the group as they attempt to form a charter school. I discuss and justify this approach in the remainder of this chapter.

Conditions for Crisis Event

Dissatisfaction$_{District}$

+

Loyalty$_{CharterSchool}$

Secession Impulse

Voice$_2$ = Voice$_1$ + Claim

+

Exit$_2$ = Exit$_1$ + Independence

Expected Reactions

Attempt to Form Charter School

Bargaining with/District Resistance
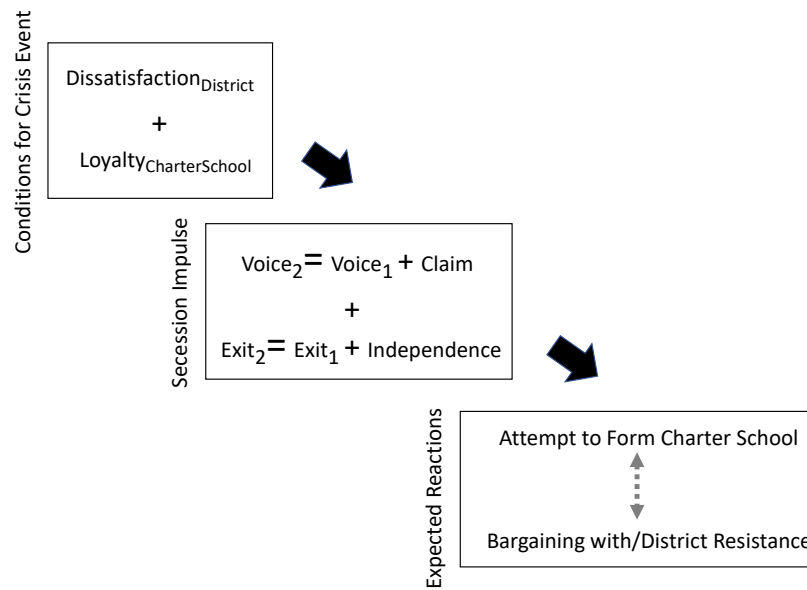
Source: Author | Note: This conceptualization draws from Figure 2.

Hirschman's Framework regarding Public Education and Points of Departure

Hirschman's framework has previously been applied to and considered in many types of organizations and policy contexts,[21] including public education (e.g., Hirschman 1970) and charter school formation (e.g., King & Taylor-King 2002, Abernathy 2005, Cox & Witko 2010, Abrams 2019). In this section, I consider Hirschman's voice, exit, and loyalty constructs in the case of dissatisfaction with traditional schools. In such instances, I follow Keeley and Graham (1991: 349), who noted that parents might choose voice, in the form of "protest against school policies," or exit, in the form of "withdraw(ing) their children from disappointing schools." Hirschman (1970: 102), argued, however, that there is no "true" exit from public education: "a private citizen can

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[21] See, for example, Lyons and Lowery (1989) for individual responses to dissatisfaction with local governments and Imbroscio (2019: 13-14) on the urban policy consequences of excessive mobility when exit is limitless.

'get out' from public education by sending his children to private school, but at the same time he cannot get out, in the sense that his and his children's life will be affected by the quality of public education."

Voice[1]

With increased cost of exit in instances of high jurisdictional integrity, voice is expected to be widespread as consumers perceive dissatisfaction with services. Dissatisfaction is subjective, and the types of voice expressing dissatisfaction vary, ranging "from relatively quiet murmurings to pointed questions or complaints, threats, and collective action" (Graham & Keeley 1992: 194). Voice increases with an increase of organizational disagreement and is expected to "pre-dominate during periods of generalized loss of confidence in the traditional system" (Hirschman 1980: 438). Hirschman (1980: 432) noted that while individual voice is costly, it is not *always* costly and there are cases in which "participation explosions," or "a sudden enormous intensification of the preference for public actions for which there are no parallels," can result in a "strange mutation" such that voice becomes "a highly desired end in itself"— "in fact, the ultimate justification of human existence." Given the impassioned arena of public education, voice, then, can be expected to dominate.

Using Hirschman's (1970) label, "quality-conscious parents" dissatisfied with the school district are expected to use their voice. Such efforts to express organizational (rather than voice regarding a child's performance) dissatisfaction and gain concessions may include participating in the PTA, voting in school board elections, influencing the strength of teacher unions, and regularly engaging with their child's teacher about the quality of education and availability of programs offered (Cox & Witko 2010). When

they note deterioration, these activist parents alert other parents, teachers, or school board officials of their concerns.

Critics charge that the TPSD privileges those who are the most vocal, which, in certain cases, may reflect special interest groups rather than parents (Moe 2003). King and Taylor-King (2002: 2) noted that school district failure to attend to voice leads to what they called "lazy monopolies."[22] To Friedman (whom Hirschman was criticizing), public schools were "classic illustrations" of monopoly (Abrams 2019: 901): the TPSD has little incentive to respond to voice and even less to respond to exit (King & Taylor-King 2002: 2-3). Thus, for those who remain consumers in lazy monopolies, voice "is likely to be ineffectual" (Allen 2014).

Exit$_1$

Hirschman's exit is a dichotomous variable—to exit or not—with the extent of organizational disagreement and loyalty affecting the calculus to leave. Hirschman (1978: 95) observed that once a path of exit is established, voice is expected to be limited: "Once this avoidance mechanism for dealing with disputes or venting dissatisfaction is readily available, the contribution of voice—that is of the political process—to such matters is likely to be and to remain limited." Thus, exit is considered the least costly compared to voice, particularly when exit is easy (Hirschman 1970: 20).

Henig et al. (2003: 38) noted that Friedman's ideas of expanded exit within public education seemed "quaint" at the time but "now occupy center stage" in political economy. The hybrid nature of charter schools, which straddle both the public and

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[22] Hirschman (1970: 59-60) referred to private sector "lazy" monopolies as those not significantly affected by consumer loss that can continue in "comfortable mediocrity."

private spheres, established exit into the governance of public education. It notably changed "the terms of the relationships among key actors in the system, by introducing new actors into the system, and by creating new pressures that require new responses" (Plank and Sykes 1999: 388). The rationale was that public school monopolists, "under competition from charter schools and, perhaps, private schools—will pay more attention to their customers and produce higher educational services if they are to survive" (Abernathy 2005: 2). In this conceptualization, charter schools are viewed as a necessary form of exit based on (socially constructed) district failure to attend to voice (Abernathy 2005, King & Taylor-King 2002). (Whether the charter schools offer a reform impact on TPSDs is beyond the scope of this study.) They offer the option of "flight" by transferring governance from the TPSD to a nearby charter school.

Critics warned of several consequences of widening the market, particularly the possibility of exit supplanting voice. Hirschman (1970: 51), for example, expressed concern that increased exit options could result in the exodus of "the most quality-conscious parents from an existing public school that is on the decline," thereby compounding crises for the deteriorating school. Abernathy (2005: 5, 14-15) noted the possibility of "paralysis of voice" due to "a concentration of politically active and effective individuals within choice schools and away from assigned public schools." In a nationally representative sample of parents and students, Cox and Witko (2010) found that greater choice (charter schools) led to increased exit and diminished voice (intended to affect the school as a whole). Further, excessive, or unchecked, flight from city to suburb schools "immunizes schools against the message sent by exit and therefore does not encourage organizational change" (Cox and Witko 2010: 4). Instead of pursuing easy

exit, critics argued that those dissatisfied with the local public schools should make greater efforts to voice their concerns.

Another point of criticism focused on nature of public education, which critics argued has higher priorities than attending to market-based principles. For example, "Schooling is no ordinary local public good," and any solution to address grievances "must meet the social and political requirements of democratic education before striving to meet the demands of efficiency, effectiveness, and fairness that we impose on quotidian public goods" (Saiger 2010: 496-497).

The tension between those advocating for voice (traditional reform within TPSDs) and exit (via charter schools) results in a "battle" between charter school advocates, on the one hand, and district loyalists, on the other. This results in several "checks" on charter school proliferation, which I address further in Chapter 3.

Loyalty$_{\text{District}}$

While the third factor—loyalty—is the "least understood" of Hirschman's framework, many conceive it as a moderating variable that influences the choice between exit and voice—or the levels between them (while others argue it is a third behavioral response to organizational dissatisfaction) (Graham & Keeley 1992). Hirschman (1970: 78) noted that loyalty to the organization is a deterrent to "hold exit at bay" and encourage use of voice. In the case of loyalty to the local school district, one would expect increased voice to express individuals' dissatisfaction with district performance and less effort for individuals to use exit to express dissatisfaction. This presumes, however, that the district uses information gleaned from voice to make reform. Further, it

presumes that voice is used to express dissatisfaction. Voice, as I explore here, may reflect a different goal: a claim to pursue exit.

Core Components of Charter School Secession

In the novel framework I developed in Figure 3, I build on Hirschman's classic framework by applying a secessionist lens to charter school formation. Hirschman (1978: 93, *emphasis added*) addressed the notion of secession in nation-state contexts, referring to it as "fission" wherein the tendency "frequently takes the form of a group detaching itself from a larger one while staying…in the same area as before. *The exit concept could, of course, be extended to cover cases of this sort.*" He abandoned the thought in the essay, instead turning to a consideration of "fission process via geographical separation" and states facing emigration and capital exit.

In the remainder of this chapter and in Chapter 3, I consider how to measure each construct of charter school secession directly. I draw on insights from district secession scholarship and framing analysis to help inform the operationalization. Discourse analysis of editorial page items in Indiana, discussed further in Chapter 4, is designed to consider these constructs along Indiana's charter school development.

<center>**Voice$_2$**</center>

In the case of charter school secession, Voice$_1$ (dissatisfaction with the TPSD) is expected to combine with or a reflect Wood's (1981: 118) political precondition of secession: crisis of legitimacy (claim) with the TPSD. Anderson (2004: 1) observed that answers to the question "Why do groups pursue secession?" focus on the list of grievances, development, and mobilization that alter the *status quo* for a group of individuals who wish to remove themselves from a particular political oversight. This

voice is strengthened if backed by the threat of exit, whether openly or understood as a possibility (Buchanan 1991a: 12). This claim may be an explicit *threat* to use charter school exit as a means of enacting TPSD concessions. Such threat is parallel to the case of *secessio plebis* described in Chapter 1 and may be leveraged to enact administrative, cultural, financial, and/or geopolitical gains from the State (see Sambanis 2006: 199, Buchanan 1991a: 10).

<center>*Measuring Voice$_2$*</center>

Dissatisfaction with TPSD is subjective and may take many forms and reflect many voices, thus making it difficult to isolate and measure. Focusing on how actors frame their positions on charters schools may illustrate claims against the TPSD (either its district form and/or its governance), as well as illustrate a claim or threat to form and exit. Claims may be articulated at public school board meetings (which are also open to the media). It is also possible that they be shared in local newspapers' editorial pages as a means of mobilizing community actors and support around a topic of public interest. Reviewing charter school applications to determine claims, while instructive in identifying sets of groups that have formally declared intent to open a charter school, may preclude the initial contextualizing information driving grievances and any subsequent TPSD and applicant negotiations (see Renzulli 2005).

Further complicating the identification of actors maximizing Voice$_2$ is that secession actors need not be a formal political unit or, drawing from secession scholar Buchanan (1997: 38), illustrate "any factual collective choice to form a political association." Thus, identifying secession actors reacting to a crisis event may be difficult absent additional contextualizing information about group goals and culture. In Chapter

<center>36</center>

3, I identify a series of frames motivating charter school formation (Voice$_1$), which may, as juxtaposed against a failure or limit of TPSD governance, expose grievances motivating a secession attempt. Outright calls to exit will be measured through actors' dialogue. Importantly, this study does not evaluate whether claims against the TPSD are *justified*, simply if they are articulated in local discourse. The rhetorical power of these claims is significant, particularly as the measures of "failure" are difficulty to verify.

Exit$_2$

While the Voice$_2$ construct illustrates the "why" motivating charter school secession; the Exit$_2$ construct focuses on the "how." Witte et al. (2010) stated that "going charter" in a community reflects a unique interplay of "entrepreneurial initiative, structural explanations, and spatial competition." This construct considers this interplay *plus*, drawing from secession theory, how actors "for whatever reason… redraw the political map by creating a new and distinct sovereign community" (Gauthier 1994: 359-360). The function of Exit$_1$ is charter school formation. Thus, Exit$_1$ must manifest in order for Exit$_2$ to develop. In Chapter 3, I consider the organizational environment affecting Exit$_1$ in Indiana and also note that competing visions of Exit$_1$ fuel Voice$_1$ as a competition between charter school and TPSD loyalists. Masked within this debate may be claims or threats to "go charter" and simultaneously break and create a new, independent charter school as a reaction to TPSD failure. Insights from district-level school secession scholarship may prove useful.

Measuring Exit$_2$: Insights from District Secessions

Scholarship focused on district secession, or the "fragmentation" of public schools wherein a group leaves a TPSD to form a new one, may offer insights to measure

Exit$_2$. EdBuild (2019), a self-described "catalyst organization, working to fundamentally disrupt the status quo of illogical & inequitable school funding" (*sic*) (EdBuild 2020), identified 128 communities that have attempted to secede from their school districts via district secession (74 successfully, 27 defeated, 17 ongoing, and 11 inactive) in the U.S. since 2000. Researchers have increasingly situated this "new secessionist movement" in the South (Taylor et al. 2019, Eaton 2014), though Bischoff (2014) identified such secessions throughout the Northeast and Midwest.

Houck and Murray (2019) defined school district secession as a means of, in Hirschman's terminology, exit without attempting to exercise voice. Specifically, they defined district secession as:

> the act of creating new school systems to allow communities to exert control over the composition and financing of school systems themselves rather than fighting for preferred policies within larger, usually more politically and racially diverse systems. (Houck and Murray 2019: 389)

Murray (2009: 61) argued that "even when concerned citizens offer fairly powerful theoretical justifications for school district secession, there are equally important theoretical objections to secession." Those interested in pursuing secession, Murray (2009: 61) stated, should pursue existing reform measures, notably school-based management councils (i.e., voice).

Houck and Murray (2019: 390) noted that secession is "driven by state law and adherence to statute" and pointed to EdBuild's (2019) report which identified 30 states, including Indiana, that have a mechanism for school district secession written into state code. They noted that state legislatures, through policy, can eliminate (or add) barriers that induce or deter district secession attempts, as was the case of Tennessee that resulted in several new districts around Memphis (e.g., Rushing 2017, Siegel-Hawley et al. 2018,

Houck & Murray 2019). Important to the study at hand, Houck and Murray (2019: 390) also noted that secessionists have tried to bypass the traditional districting procedures and "declare themselves independent" by using the state's charter school legislation to create separate charter districts. Drawing on state policies affecting charter school development and how it eases the creation of charter school districts, as well as any intersection points with district-secession policies, will be instructive to this study.

Growing scholarship on district secession focuses on the *resultant* racial and financial segregation between new and previous districts (Frankenberg 2009, Rushing 2017, Siegel-Hawley et al. 2018, Taylor et al. 2019). The "hyper-local" (often white and comparatively wealthier) residential enclaves that develop between districts is of increasing heightened academic (Renzulli & Evans 2005, Saporito & Sohoni 2007, Frankenberg 2009, Richards 2014, Siegel-Hawley et al. 2018, Taylor et al. 2019, Houck & Murray 2019), non-profit (EdBuild 2019), and media (Spencer, 2014, Guo 2015, Camera 2017, Kirk 2017, Cline 2018, Reeves 2018, Strauss 2018, Bloomfield 2019, Felton 2019, Harris 2019) concern. While necessary and important, these post-secession studies tend to ignore the *formative* processes of secession (i.e., the secession impulse).[23]

Houck and Murray (2019: 390) identified legal frameworks and case law that enable pursuit of district secession. For example, they pointed to the cases of *San Antonio v. Rodriguez* 1972 which "isolated school financing decisions from comprehensive federal oversight," and *Milliken v. Bradley* 1974 which "exacerbated this neglect by immunizing school district boundaries from student assignment policies" (Houck and

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[23] For rare exception see Siegel-Hawley et al. 2018 who focus on political impulses.

Murray 2019: 390). These cases underscore the entrenched local control of districting decisions. Siegel-Hawley et al. (2018: 651) attributed "colorblind law and policymaking" that "gives already privileged communities a race-neutral, legally sanctioned, and politically persuasive way to discuss resource accumulation that maps onto existing racial and economic segregation" as another contributor to secession. They noted that the introduction of charter school legislation legally sanctioned exit and coincided with a marked a shift to "an almost singular focus on standards, accountability, and unregulated school choice" within public education (Siegel-Hawley et al. 2018: 652-653).

Houck and Murray (2019: 391) identified another factor in this legal framework: the "dizzyingly complex" school finance and resource allocation system that incentivizes smaller, wealthier areas "to gain a fiscal and competitive advantage over surrounding school districts" via district secession. State education funds are distributed to districts by state funding mechanisms, while local funds derived from property tax valuations "are often considered the largest driver of educational inequality" (Houck & Murray 2019: 391).

To remedy stratifications by race and class in local educational settings, Saiger (2010: 496) argued that U.S. school district boundaries should be periodically redrawn so as to dissolve "within-district accretions of wealth and poverty." This is not the case, however. State and district-level reforms to redress boundary issues have included forced closure of underperforming schools or districts (dissolution), realignment of school catchments within a district (redistricting), or the merger of multiple schools or districts into one (consolidation or annexation). Drawing from insights of local government, consolidation can inevitably lead to a rise of local identities and localism, however.

This increasing thread of district secession scholarship is especially valuable from a standpoint of justice but limited in its ability to address activist groups' end goal of creating an independent "state." Other institutional forms of secession have been identified beyond district secessions, including mayor-led secession movements[24] and the recent trend of creating new cities in order to establish independent school district.[25] To investigate how secession intersects within the context of charter schools, insights from district secession point to the need to focus on charter school legislation and its development, the funding mechanism between districts, and the interplay of both class and race in motivating secession. How the goal of independence is articulated is expected to be exposed in the subsequent discourse analysis.

Loyalty$_{CharterSchools}$

In the case of charter school secession, Loyalty$_{CharterSchools}$ is expected to be to the charter school mode of governance, which will allow—borrowing from secession scholarship—seceders the advantages of internal exit by staying in place (e.g., Buchanan & Faith 1987). Like Hirschman's construct of loyalty to the organization that influences the degree of voice and/or exit, secessionist actors' degree of allegiance to the charter school form is expected to influence the likelihood of charter school secession. The degree to which this loyalty occurs is expected to be contextual, though secession scholars have noted that greater group cohesiveness in terms of ideology and spatial

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[24] For example, a mayor-led education secession movement in Utah pitted suburban city mayors against school district leadership (Buendia and Humbert-Fisk 2015).
[25] Such was the case of Central, Louisiana, which formed to create Central Community Schools (Bloomfield 2019). As of this writing, another group is following suit by trying to incorporate the City of St. George with a stated goal of then creating a local independent school district in the southeastern part of East Baton Rouge Parish ("About Us" 2019).

concentration increase the likelihood of secession (Walter 2006, Wood 1981). The commitment to territory is critical to secessionists (Collier & Hoeffler 2002: 4) and may reflect efforts to preserve one's community, home, or identity (Wood 1981). This new construct of Loyalty$_{CharterSchools}$ also reflects a commitment to charter schools over other forms of exit, such as exiting to another district, creating a new TPSD, or pursuing private exit options.

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Figure 4 outlines the conceptual framework I used to explore charter school secession in the subsequent discourse analysis. The framework responds to calls for new opportunities to evaluate secession.[26]

Figure 4: Conceptual Framework to Explore Charter School Secession
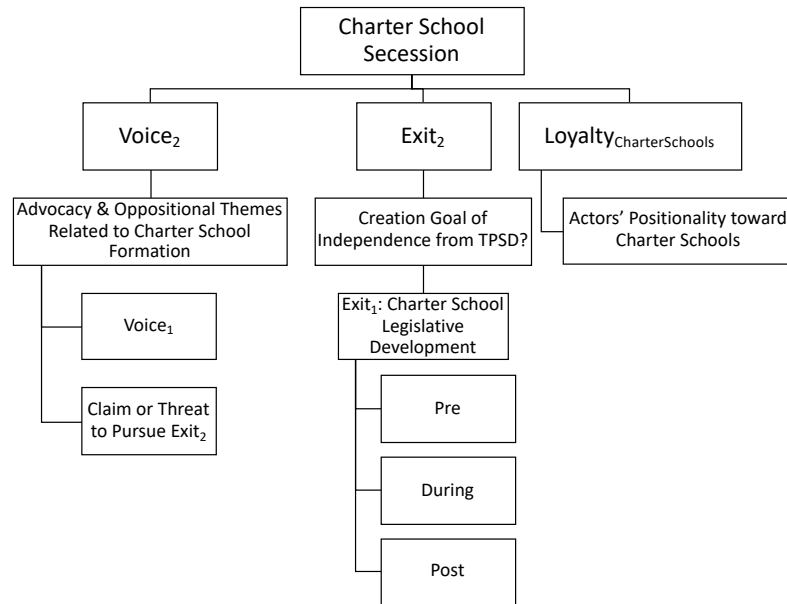
Source: Author | Note: This framework corresponds with Figure 3.

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[26] See, in particular, Buchanan 1991a: 2-4, Wood 1981.

Conclusion

In this chapter, I developed an operational definition of charter school secession using the foundation of Hirschman's (1970) classic voice-exit-loyalty framework. The new framework departs from Hirschman's in three significant ways. First, while it considers dissatisfaction with the TPSD, it shifts loyalty to the charter school mode of governance (Loyalty$_{CharterSchools}$) rather than to the TPSD. Second, Voice$_2$ moves beyond expressing TPSD dissatisfaction to also include a claim or grievance against the district. Third, Exit$_2$ moves beyond market entry to consider whether charter school formation is pursued with the goal of independence from the TPSD.

While Hirschman's (and others') concern was that exit will *supplant* voice in public education, I hypothesize that in the case of charter school secession, Voice$_2$ and Exit$_2$ *combine* around a secession impulse. That is, in the case of charter school secession, actors are expected to declare their intentions to exit based on loyalty to charter schools and a simultaneous claim against the TPSD. How this is perceived and legitimized is significant in determining the outcome. In the next chapter, I consider how Voice$_1$ and Exit$_1$ may manifest in the organizational environment of Indiana's charter schools. I then consider whether the secession impulse is part of this development in Chapters 4 through 6.

CHAPTER 3: CONCEPTUALIZING SECESSION IN THE ORGANIZATIONAL

ENVIRONMENT OF INDIANA CHARTER SCHOOLS

In this chapter I consider how $Voice_1$ and $Exit_1$ constructs, defined in Chapter 2, may manifest relative to charter schools. I begin with conceptualizing the organizational environment of charter schools in Indiana to consider factors that influence whether charter schools form ($Exit_1$). This may influence the conditions of secession. For example, inability to pursue charter school formation ($Exit_1$) may present, given $Loyalty_{CharterSchools}$, as a claim against the district (component of $Voice_2$). In contrast, unimpeded $Exit_1$ may diminish the need for $Voice_2$ and lessen the prospect of secession. Focusing on one state's internal attributes allows for better appreciation of the actors and forces (i.e., cultural, economic, political, and/or racial) that contribute to or prevent charter school development (Renzulli & Roscigno 2005: 345, 347). This approach, as I explore in the subsequent discourse analysis, allows greater exploration of within-state factors affecting secession. In the second part of this chapter, I identify six prominent themes related to why charter schools form, drawing on insights from charter school, urban studies, and school district secession scholarship. I use these themes to identify $Voice_1$ in the discourse and to consider whether actors discuss or frame their loyalty to the charter school model as an indicator of TPSD failure or limit.

Indiana's Current Charter School Landscape

On May 2, 2001, ten years after the first legislation was approved in the country, Indiana became the 38th state to adopt charter school legislation. Eleven charter schools

opened in 2002, and during the 2018-2019 school year, 104 charter schools served approximately 4 percent of students in Indiana's public schools (Leroy 2018). Charter schools, which are their own corporations (StatsIndiana 2020), are spread throughout the state. The largest concentration of charter schools are located around Indianapolis, which is also home to Indianapolis Public Schools, the largest public school district in the state.[27] Though the exact numbers vary over the course of the study's analyzed timeframe, Stokes (2013) estimated that approximately 10 percent of the TPSDs in Indiana have charter schools located in them, though "there is no method to assign a charter school to the geographic corporation in which it is located" (StatsIndiana 2020). Thus, Indiana reflect a combined total of more than 400 school corporations (including 104 charter schools as of 2018-2019) (NCES 2020) that serve approximately 1.1 million K-12 students in the state (EdWeek 2020).

According to recent demographic data reported by Cavazos (2018), charter school enrollment has slowed in Indiana, and comparisons between student performance between TPSDs and charter schools are "mixed." Most of the population attending virtual charter schools (which administers more than 50 percent of education online), is white with families with higher incomes (Cavazos 2018). The top two high schools in Indiana according to a US News and Report are charter schools: Evansville's Signature School and Indianapolis' Herron High School (Leroy 2018). More than half of students in Indiana charter schools live in urban areas (notably, Indianapolis, Gary, South Bend, and Anderson), with charter schools serving higher percentages of students in poverty

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[27] See Appendix A.1 for a distribution of charter schools in the state and Appendix A.2 for a boundary map of traditional school districts in the state.

compared to local TPSDs (Cavazos 2018). The largest charter school market

concentration is in Gary, where 43 percent of students attend a charter school (Cavazos

2018).[28] Gary officials embraced charter school creation early following significant

population loss and school closures associated with the exodus of the city's booming

steel industry (Kraus 2013). Similarly, stakeholders in Indianapolis, with 28 percent

charter school market share, embraced charter schools initially (Cavazos 2018).

Charter School Policy: "Legislative Dance between Pro- and Anti-Charter Forces"

The charter school movement reflects "an on-going legislative dance between

pro- and anti-charter forces," with amendments to charter school legislation involving

negotiations to make the law weaker (i.e., harder for charters to operate) or stronger (i.e.,

ease barriers to operation) (Cookson and Berger 2002: 51). Thus, the movement

continues to "reinvent itself" in intrastate contexts (Cookson & Berger 2002: 51). In this

section, I consider how "sociopolitical dynamics may constrain or enable the emergence

and survival of organizations" (Renzulli 2005: 4). The negotiation or "dance" between

charter school and TPSD advocates and opponents affects charter school formation and

district response (Renzulli 2005: 4), which may influence the calculus of secession.

Policy Development

The policy-making process has multiple stages including agenda setting, policy

formulation, policy adoption, policy implementation, and policy evaluation (Dunn 2008).

Legislative adoption is both political and legal, with actors ideologically motivated to

support or thwart the policy (Renzulli & Roscigno 2005: 357). In the case of charter

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[28] This is up slightly from Gary's 37 percent charter market share in 2014, which placed Gary 5th overall in the nation with its charter enrollment share (National Alliance for Public Charter Schools 2014).

school policy-making, debate emerges in public forums such as the general assembly and community newspapers. Charter school legislation passes in states with populations "widely dissatisfied with their system of public education" (Cookson & Berger 2002: 50) and signals an opportunity for "people legitimately to form public schools outside the bureaucratic and traditional constraints of local school boards" (Renzulli & Roscigno 2005: 345). Policy debate was prominent in the 1999 Indiana General Assembly, but Republican State Senator Teresa Lubbers had championed it seven years in the IGA before it was codified in 2001 (Johnston 2015).

Simply having a law does not ensure the creation of charter schools, however, as implementation and growth is dependent upon creators' access to resources, desire to form, and barriers that prevent formation (Renzulli 2005, Renzulli & Roscigno 2005, Witte et al. 2003). Renzulli (2005: 6) noted that during the early adoption and implementation stages, there may not be a clear conflict between TPSDs and charter school advocates as only a few organizations may vie for the same education resources. By the post-implementation phase, however, charter school creation "becomes more sociopolitically legitimate" (Renzulli 2005: 4) and contests emerge over unused school buildings, public funds, and local and state policy efforts to expand (or cap) the charter school "competition" through limits on the number and types of chartering authorizers and schools that can form. Additionally, input and debate from a variety of community stakeholders regarding the juxtaposition of charter schools alongside TPSDs is expected to continue until the community reaches a maximum carrying capacity for educational organizations (Renzulli 2005: 6).

Today, Indiana is noted for its strong charter school law, which correlates with the number of charter schools expected to form (Renzulli & Roscigno 2015: 358). The National Alliance for Public Charter Schools (2019) ranks Indiana as the best in the nation for its "friendliness" to the creation of charter schools, its breadth and types of authorizers, and its limitless on the number of charter schools that can be approved.

Formal Application Process to Form Charter School

The bargaining and negotiation processes affecting charter school application submission and approval may prove significant to secession actors: if the path of $Exit_1$ is too costly, secession actors may find an alternative exit path or ultimately dissolve their attempt. Forming a charter school requires the formal submission and acceptance of a charter application, which indicates a group's intent to fund and operate the school and signals the group's desire to exist outside the purview of the local districting authority. The process of applying requires knowledge of the process, time and resources to research and develop the application, and a higher inclination to "initiate a school where their application will be successful" (Renzulli 2005: 8).

Authorizer Caps to Number of Charters Allowed to Form in Indiana

The state board of education empowers an authorizer to approve the formation and implementation of a charter school. Unlike TPSDs, prospective charter school groups can *choose* their authorizer. In Indiana, denied charter school applicants can revise and resubmit or "shop" their proposal to a new authorizer. Authorizers vary by number and type (local versus state; appointed versus elected boards), thus contributing to the disjointed charter school landscape (Feldscher 2015). The state legislature initially capped the number of charter schools sponsored by the Indianapolis Mayor's Office at

five per year, with stipulations on how "unused" authorizations carried into subsequent years (IC 20-24-3-15). Over time, the caps were lifted.

As of 2018, Indiana had eight authorizers, three of which oversee most of the state's charter schools: Indianapolis mayor's office (35 schools), Ball State University (28 schools), and the Indiana Charter School Board (17 schools) (Cavazos 2018). There are presently five types of authorizers in Indiana, with the last one added in 2011.[29] These authorizers grant Indiana's charter schools "significant operational autonomies" (Center for Education Reform 2018: 32). Presumably, those interested in charter school secession should be able to approach and engage one of these multiple authorizers, shopping around for the one that best fits their interests and mission.

Political Culture

The politics and control of territorial consolidation, decentralization, deannexation, and incorporation may impact charter school secession. In particular, school district consolidation, disannexation, and incorporation may impact a group's desire and likelihood of pursuing charter school secession. For example, the state's history of increasing TPSD consolidation may spur $Exit_1$ efforts, and charter school secession actors may look to Indiana's district secession policy to inform their attempts.

District Secession

Indiana is less friendly to breakaway school districts, with a provision in state code (IC 20-23-4) requiring a series of actions from breakaway actors, approval by

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[29] According to Indiana Code 20-24-1, these include the local school district, a state educational institution that offers a four-year baccalaureate degree; the executive of a consolidated city (e.g., Indianapolis); the Indiana Charter School Board; or a nonprofit college or university that offers a four-year baccalaureate degree.

county *and* state authorities, and voter approval. The committees consider the educational and financial (but not racial) impacts of the proposed secession, and if they approve, turn the final decision to voters in the proposed district, either by vote or petition (EdBuild 2019). This process developed, as described in Chapter 6, over the course of the study's timeframe, as well as during the course of writing this dissertation. The code's continuing relevance is part of an ongoing (as of the time of this writing) district secession attempt in West Clark Community Schools. In 2018, a decision from the Indiana State Board of Education clarified that the county committee need not be involved, and a group could submit a proposal directly to the state board (and continue the process as described above). The recent removal of the county committee eliminated a barrier to district formation, and "reinterpreting the existing statue to streamline the process, the State Board has greatly increased the likelihood of community divisions" (EdBuild 2019).

School Consolidation

Over the course of the 20th century, schools—like cities—consolidated from small, localized forms to achieve economies of scale. The Indiana School Corporation Reorganization Act of 1959 "was the catalyst for reducing the number of school corporations in Indiana" from roughly 900 to 292 TPSDs today (Spradlin et al. 2010). In 2007, Governor Mitch Daniels commissioned a study on "Streamlining Local Government," which included a recommendation to "reorganize" school districts to achieve an optimal size greater than 2,000 students (Indiana Commission on Local Government Reform 2007: 9). The report noted that small districts had duplicate administrative staff and failed to reach a critical mass for diversity of programming. In their study, Zimmer et al. (2009b: 103) identified an optimal enrollment of 1,942 students

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in Indiana's school districts (and a per-pupil cost of $9,913.93). After several years of legislative debate, Daniels backed a bill in 2011 to force the consolidation of Indiana's smallest districts (Morello 2012). TPSD consolidation may induce attempts to form charter schools, as the model is lauded for its ability to preserve school autonomy and community and offer smaller school sizes.

A Contest over Shared Territory

In this section, I consider how a community or system-level view of the relationship between TPSDs and emergent charter schools exposes a range of actors and voices competing for the same territory. This competition affects the civic, political, and economic landscape of cities, with actors competing over financial, social, human, and fixed capital. Disputed territory is a central precondition of secession according to Wood (1981), with secessionists attempting to seize territory already claimed by the State (Brilmayer 1991: 178, Bishai 1999: 74). This seizure has significant community impacts, breaking and recasting the link between people and territory in both communities (Anderson 2004: 3).

The "battleground" of public educational governance is often framed as a direct competition for resources between "enemies" (Fuller 2000)—TPSD versus charter school supporters—for students, teachers, per-pupil funds, school buildings, transportation, and community business, and civic support. Nationally, this "us-versus-them" mindset plays out in pro-charter school and the anti-charter school movements (Cookson and Berger 2002: 51-52) and is often drawn along partisan and ideological lines (Ertas 2015). However, members of both major political parties at state and national levels support charter schools (Abrams 2019). Broadly speaking, conservatives tend to favor education

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policies that offer more market infusion and parental choice among public school options, and liberals tend to support charter school implementation (particularly in urban environments) as a means to offer more competition and choice to students who might otherwise be failing in public school settings (Bulkley 2005, Mulvey et al. 2010).

Public education is a function of state governments with educational decision-making implemented by the local educational authority. The traditional organization of public school governance is a system built on every U.S. residential location being tied to one, and only one, public school district—the TPSD (Saiger 2010: 496). These districts vary in size and shape, but their territory "defines which children they must educate, who may vote, and what tax base they may reach" (Saiger 2010: 502). While districts are "powerless" beyond their territory, they have significant autonomy *within* them to "tax, budget, spend, incur debt, hire, fire, bargain with labor, and set policy generally," among other functions (Saiger 2010: 502).

When state boards of education withdrew the "exclusive franchise" historically given to TPSDs (Kolderie 1990) and divided it between TPSDs or charter schools (often considered a single district), the political debate between models emerged. Appendix A.3 lists general differences between TPSDs and charter schools regarding school creation and governance, funding, curriculum, admission and cost, size, and teacher qualifications. These differences underscore the potential for conflict within communities regarding educational preferences.

Approaches to Explore the Relationship

The relationship between charter schools and their local school districts is case-specific (Cookson & Berger 2002: 60). Some districts embrace charters, even becoming

charter school districts and providing facilities, administrative infrastructure, transportation, and professional development. In contrast, "others treat charter schools as mortal enemies" (Cookson & Berger 2002: 61) and engage in battles to prevent formations. Such battles may occur over a long span using significant resources and campaigns or may occur in short, concentrated efforts. As considered in Chapter 2, these frictions between TPSDs and charter schools may spark or reflect the conditions for another dimension of exit: charter school secession.

Plank and Sykes (1999) noted that research on impact of charter school introduction (as legislation or emergent school creation) on TPSDs is considered along three planes: individual student level (difference in enrollment effects and parental decision-making), school and classroom level (whether competition results in "significant changes in governance, curriculum, pedagogy, and ultimately student achievement in affected schools" [Plank & Sykes 1999: 389]), and the public system as a whole. Studies on these factors are numerous (see Wei et al. 2014 for a helpful overview) but beyond the scope of this study. As this study is interested in governance between the two systems, it is situated on third level and considers if actors communicate their system preference and how they share their perceptions of competitive impacts in their respective communities. It is my assumption that these shared individual beliefs and values, as I explore in the discourse analysis, may reveal crisis points and reflect negotiation between groups attempting to secede via charter school districting and those trying to prevent it.

Competing Voices

Educational reforms and public school governance generally are continually met with resistance from a variety of actors due to the long-lasting influence of schools on

shaping individual knowledge, behavior, and identities, and, by extension, those of families and communities (Collins & Coleman 2008: 282). Politicians decry the expense and inconsistency of student and teacher performance, while teachers often bemoan the politicization of education and the interference of non-educators (Johnston 2015). Thus, "turf wars" abound between and among local, state, and national politicians and policy makers, teachers, parents, and the taxpaying public in search of the "one best system" to organize public schools (Tyack 1974).

General stakeholders in the competition of TPSDs and charter schools include school and district administrators, teachers, parents, and students (though their autonomy may be drowned out by adult-imposed norms [Collins & Coleman 2008: 285-286]). Other actors include local business and civic leaders, including newspaper staff, as well taxpayers who fund Indiana's public education.

Relevant Political Actors in Indiana

Kirst (2007: 188-189) identified several types of actors involved in influencing local pro-charter movements, as well as counter-coalition actor types. These include parents dissatisfied with local school, community-based organizations, national advocacy organizations with state affiliates, local business leaders; institutions of higher education; real estate developers; and faith-based organizations, among others. Counter-coalition actor types may include members of teacher unions, school boards, local administrators, and the PTA, among others.

State politics and politicians also play a key role. Aside from elected politicians relevant to public education governance in Indiana, actors were not identified *a priori* to discourse analysis. Governors, mayors of Indianapolis, and state superintendents of

public instruction (listed in Appendix A.4) are prominent political figures who impact Indiana's and Indianapolis' public education policies. The Indiana state superintendent of public instruction is an elected, partisan position, with change in political leadership shifting from three Republican superintendents to Democratic challenger Glenda Ritz by the study's end. As noted below, Indianapolis Mayor Bart Peterson (a Democrat) was influential in embracing and championing the state's adoption of charter school legislation, in addition to serving as a charter school authorizer.

Contested Space in Indianapolis

Exploring if secession manifests in Indianapolis' charter school history will by informed by two notable features: (1) Indianapolis' unique mayoral sponsorship of charter schools and (2) its history of racial segregation. Indianapolis was the first city in the country to authorize charter schools, and Mayor Peterson was called the "Peyton Manning of charter schools" for his pioneering efforts (Skinner 2007). He (and to a lesser degree Governor Frank O'Bannon, also a Democrat) was lauded by Republicans for his willingness to embrace and champion Indiana's initial charter school legislation (Johnston 2015). Currently, the Indianapolis Mayor's Office of Education Innovation is responsible for the authorization and oversight of 36 mayor-sponsored charter schools on 42 campuses ("Mayor-Sponsored Charter Schools" 2019). These public charter schools are not part of, governed, or administered by IPS or IPS personnel.

Indianapolis is unique among unified city-county governments because "it was the only one to explicitly leave schools out of the deal" (Cavazos 2016). To avoid forced integration and the ensuing backlash and "chaos," Indiana state lawmakers purposefully chose not to merge school districts when Indianapolis and Marion County unified in 1970

under "Unigov." As a result, Indianapolis' public education distribution was highly

fragmented, with IPS at the core and 10 districts surrounding it in a fragmented ring

pattern (Cavazos 2016). Samuel Dillin, the U.S. district court judge who ordered busing

in Indianapolis in 1979 (which took effect in 1981), said (as qtd. in Cavazos 2016) that

the failure to merge school districts "was racially motivated" as many African American

students lived in the urban core and white students primarily enrolled in the surrounding

districts. According to then-mayor Richard Lugar, "Unigov was not a perfect

consolidation....A good number of people really wanted to keep at least their particular

segregated" (qtd. in Cavazos 2016). Mayor Peterson championed the idea of introducing

"quality" charter schools into the Indianapolis Public Schools (IPS) district (Johnston

2015: 26), which was widely perceived as a failing district in need of substantial reform

in the late 1990s.

A Contest over Resources

Even if charter school formation (Exit$_1$) is a political and legitimate option, it, like

secession (Anderson 2004: 9), is tempered by practical concerns. While there may be a

desire to form, actors must have the *resources* to form. Finn et al. (2002) identified

several categories of startup problems that charter schools face, including policy issues

(i.e., political opposition at state and local levels and difficulties with school boards,

administrators, teachers, and parents), school-level issues (i.e., funding/business and

enrollment), and resource issues (i.e., staffing and difficulties obtaining facilities). Access

to funding and suitable facilities is especially relevant to charter school formation—one

that may even deter charter school applicants from applying (Renzulli 2005: 8). Notably,

Indiana did not fund charter schools in its initial enabling legislation, limiting initial charter school applicants to those with immediate cash on hand.

Entrenched educational bureaucrats "may have significant institutional interest in opposing charter schools and stopping potential founders from co-opting the resources for starting and maintaining them" (Renzulli 2005: 5), as opponents are concerned that charter school creation will leave the local school district stripped of tax dollars, short high-quality teachers, and left to fight for community partnerships. Charter school creators may simply avoid climates they see as hostile.

One of the contested resources is students and their associated "basic tuition support grant" which, in Indiana, follows the student to the public school of their choice ("Charter Schools FAQs" 2019). State funding for charter schools is limited to per-pupil management *without* capital outlay and maintenance, which charter schools must secure on their own. As charters are unable to leverage municipal funds like TPSDs, they often seek federal funds and partners (e.g., local businesses or churches) that can offer monetary and fixed capital, knowledge of funding sources, curriculum programs, and effective management (Cookson & Berger 2002: 60, Wohlstetter et al. 2004). Some may also actively seek funding in the form of foundation grants, corporate support, and donations, which may be viewed as a threat to TPSDs who seek the same support.

Establishing Voice[1] in the Context of Charter School Development

In this section, I note and describe six dominant themes promoted by charter school advocates: Autonomy, Innovation, Efficiency, Economic Development, Zoning, and Equity. These are not exhaustive of the often ideological and politicization themes related to charter schools in policy narratives but are intended to be a helpful reference

point to explore whether visions driving charter school formation are framed as a failure or limit of TPSD governance. Ertas (2015: 428) observed, "It is a common sentiment that the debate on charter schools is grounded more on ideology and interest-group polarization than on evidence." As Buckley and Schneider (2005: 267) noted, "even the most basic descriptions of charter schools are often infused with hype." Thus, the *perceptions* (rather than the verifiability) of a need for change fuels charter school debates among educators, parents, politicians, and the community (Plank & Sykes 1999, Ertas 2015, Feuerstein 2015). I consider these themes as often complementary and reinforcing and expect that actors may use and respond to more than one in their positionality on charter school reform in local contexts.

Henig and MacDonald (2002) observed that the debate over charter schools is often presented along two competing economic visions of the market—classic and biased (Henig & MacDonald 2002). In the first vision, "markets are colorblind" and charter schools emerge from "neoliberal commitments and using market-based solutions to educational problems" (Mann et al. 2016: 13) to offer greater choice (Brouillette 2002: 5), competition (Chubb & Moe 1990), and improved outcomes in the public education marketplace. Advocates argue that this allows parents to avoid mobility costs and private school fees while still benefiting from public education (Renzulli & Evans 2005: 400). Further, the "ripple effect" of redistributive consequences is expected to provide more opportunities to minority groups and to parents who may not have otherwise had the option of choice. It is also expected to spur TPSDs to reform and ultimately create "more vibrant communities" (Buckley & Schneider 2009).

In the second vision, the market is viewed as "systematically biased in favor of those already advantaged of money, mobility, knowledge, and information" (Henig & MacDonald 2002: 963). According to this line of thinking, those seeking homogenous settings (perhaps racial, economic, academic, or cultural) will pursue charter school formation as the means by which to attain their goal, which "will exacerbate segregation as markets seek to cater to these consumer demands" (Henig & MacDonald 2002: 963).

Autonomy

According to Renzulli (2005: 3), "systematic national studies of charter schools have shown that *autonomy* is a primary motivation for the founders of charter schools." Autonomy, or the ability to self-govern, focuses on parents' ability to take control of and choose the form of education that meets their needs (Renzulli 2005: 1). Instead of engaging traditional school reforms (that are often over technical issues and "considered 'insider's game,' played by bureaucrats, administrators, teachers, and other school professionals") (Buckley & Schneider 2009: 225, see also Chubb & Moe 1990), charter schools can allow those "who perceive themselves as marginalized or disenfranchised to seek shelter from an indifferent or even hostile public school system" (Buckley & Schneider 2009: 5). In the case of charter schools, autonomy brings decision-making closer to the consumer-parent and gives more direct control over budgeting, curricular, and resource decisions to parents, teachers, and school operators who come together in cooperative agreement to form (Wohlstetter et al. 1995, Bulkley & Fisler 2003, Henig et al. 2005, Ravitch & Viteritti 1996). The case for local control of public education has a long history, dating even prior to the formation of the United States, and has been, as noted in Chapter 2, reinforced through the courts (i.e., *Milliken v. Bradley*).

While studies focus on the role of the state in shaping this autonomy (e.g., Wohlstetter et al. 1995) and question the degree of individual school autonomy in practice (e.g., Finnigan 2007), the localized approach to charter schools varies "on local culture, preferences, and needs" (Brouillette 2002: 2). Ultimately, this frame focuses on the role of "citizen sovereignty" in education by introducing choice to the public education marketplace, thereby infusing competition and breaking the district monopoly of educational resources and delivery (Brouillette 2002: 6). Like city marketplaces in which "the consumer-voter may be viewed as picking that community which best satisfies his preference pattern for public goods" (Tiebout 1956: 418), charter schools, through choice, offer a new option to consumer-parents outside the TPSD.

Innovation

Charter schools and innovation go hand-in-hand, as charter schools are often presented as an innovative alternative "intended to undercut monopolistic political control of public education" (Lubienski 2003: 396). Innovation is expected to allow groups to "escape" the overreach of state and federal control in education and the continuing cycle of local, state, and national educational reform efforts which followed the landmark 1983 publication of *A Nation at Risk* (Mehta 2013). Some perceive TPSDs to function *solely* to implement these standards.

Freed from the local school board control (and its bureaucracy, rules, regulations, and union control), charter schools and their teachers (what Milliman & Maranto [2009] called "educational renegades") are—ostensibly—given wider latitude with curricular and managerial freedom compared to their TPSD counterparts. They are expected to experiment, create, and innovate in their delivery of education. In return for this freedom,

charter schools are held to the standards outlaid in the charter school contract, which

typically lasts 3 to 5 years (Bulkley & Fisler 2003: 318). Such innovations may focus on

a particular curricular model (e.g., focus on the arts, specialized foreign language,

emphasis on math, etc.), pedagogic model (e.g., teaching style, length of school day,

dress code, etc.), or other attribute not available in the TPSD. Some charter schools may

focus on "at-risk" populations (i.e., students at-risk of dropping out), while others provide

accelerated or concentrated opportunities compared to the TPSD. Critics charge that

charter schools' innovative curriculum may teach beyond or short of values that the

public expects and that TPSD schools should be empowered to innovate, too.

Efficiency

During the 1980s, the neoliberal reaction to the bloated nature of educational

bureaucracies called for greater efficiency in public education governance (Wohlstetter et

al. 2004) by infusing business principles into the educational marketplace (Chubb & Moe

1990).[30] Historically, U.S. education administrative units progressed from small, informal

community arrangements into large, professionally managed bureaucratic organizations

(Strang 1987: 352), and, "[a]s everyone knows, the education bureaucracies dwarf all

others in their size and resistance to change" (Peirce 2001).

The charter school model is touted as revenue-neutral or revenue-saving. It is

purported to offer better student outcomes with fewer costs and resources and greater

transparency compared to traditional districts (Renzulli & Evans 2005).[31] By allowing

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[30] For a wider discussion of schools and districts as bureaucracies and public school teachers as "street-level bureaucrats," see Lipsky 1980.
[31] As a reminder, this study focuses on how actors frame their perspectives on charter schools rather than the verifiability of such claims. Scholarship on student performance between TPSDs and charter schools is

independent management of school operations, charter school advocates argue that they will "circumvent the inefficiencies created in school bureaucracy" (Renzulli 2005: 6) and be freed of many of the rules and administrative costs that constrain TPSDs (Bulkley & Fisler 2003: 318). Through competition, the charter school model is expected to spur both charter and traditional schools to perform more efficiently (Wohlstetter et al. 2004: 323).

Charter schools, as schools and districts, are generally smaller in size to their TPSD counterparts. Some argue that eliminating the large top-down bureaucracies associated with TPSDs will empower parents to be "co-producers" of their child's education (Buckley & Schneider 2009: 225). Others have a normative predisposition to small size and local, turning to the Aristotelian argument that small is local, bigger is not always better, and there is a proper limit to size. They argue smaller is more efficient, democratic, and sustainable than larger scales (Purcell 2006). Critics charge that charter schools are not the only schools that should benefit from fewer regulations, however.

Further, critics argue that duplicative bureaucracies (charter schools and TPSDs) are inefficient. The business of charter school development has resulted in an industry of developers, operators, philanthropists, and state and national-level advocacy efforts to increase the charter school market share in school districts (Scott 2009). These groups seek to remove local and state barriers to charter school entry and allow the educational market to dictate whether and where charter schools form. Through "strategic positioning," developers calculate the charter school's location based on nearby

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large in volume, with mixed findings (e.g., Miron and Nelson 2001): student achievements in charter schools are comparable in some instances (e.g., Bettinger 2005, Ravitch 2013), superior in some instances (e.g., Betts and Tang 2011), inferior in some instances (e.g., Bettinger 2005, Bifulco and Ladd 2006, Betts and Tang 2011), or so "complex" that the two should not be compared (e.g., Buddin and Zimmer 2005).

educational and demographic characteristics (Gulosino & Lubienski 2011, Glomm et al.

2005, Wilson & Carlsen 2016) to ensure charter school longevity in the market (Renzulli

et al. 2015).

Economic Development

The introduction of charter schools into the urban space has been called "the final

frontier of inner-city revitalization" as it "may neutralize the biggest 'push' factor that's

driven working and middle-class families out of cities"—undesirable schools (Peirce

2001). This mostly white, middle-class exodus ("White Flight") from the city to the

suburbs beginning in the 1960s resulted in comparatively higher-performing suburban

schools, while city schools were left with decreased tax bases and comparatively larger

minority enrollments (Stone 1998: 4). According to Dreier et al. (2004), families were

both "pulled" out of the urban cores by federally insured mortgages and highways and

simultaneously "pushed" into the suburbs by increasing central city poverty, calls and

policies to support racial integration efforts, and deteriorating urban social conditions. By

the 1990s, the combination of these demographic, social, and political forces resulted in

notable suburban enclaves—and the TPSDs financed by them—that "hoarded" social and

educational resources and networks at the sacrifice of inner cities (Hankins 2007, Ford

2011, Rury & Saatcioglu 2011: 308).

American suburbs and inner cities both have undergone rapid demographic

change in the past 30 years, however. While there are still concentrations of urban

poverty and racial segregation between city schools (Orfield et al. 2019), racial and class

divisions are now present in the suburbs *and* the cities (Dreier et al. 2004, Macedo 2011:

42). Domina (2006: 388) also observed that educational segregation, or the notable

division of residents based on their educational backgrounds, is another factor in residential segregation that has led to "new inequalities of economic opportunities" within and among communities. According to Domina (2006: 390), "the highly educated share the central city with workers in the service industries, while the middle classes spread into suburban and exurban areas." The expectation is that families in urban and suburban areas alike, at all social economic rungs, compete for high-quality education.

Given these changes within urban (and suburban) settings, some city officials, business leaders, and civic institutions pursue charter school development as an economic strategy to break the conventional urban-suburban migration pattern of educational shopping (Renzulli & Evans 2005, Hankins 2007) and ultimately grow the city. Drawing from growth machine insights (see Logan & Molotch 1987; Molotch 1976), local politicians pursue (sometimes "perverse") efforts to attract higher-income residents based on their high tax contributions and low public service dependability (Dreier et al. 2004: 111). Billingham and Kimelberg (2013: 86), for example, characterized this process in urban environments as one led by middle-class "incoming consumers within the gentrifying urban landscape" and "urban elites and the institutions that they control"—who are "frequently the same people." An expected economic development narrative might be to present charter schools as specialized and high-performing in order to recruit the "best" students to city charter schools. As "market incentives would be expected to steer charter schools to locate in inner cities where needs are greatest and competition weakest" (Henig & MacDonald 2002: 963), another expected narrative might be to present charter schools as an opportunity for those "trapped" in urban city schools to "flee" low-performing schools.

Zoning

The link between home ownership, local funding of public schools,[32] and zoning contributes to positional advantages for those whose consumer-voter preferences are anchored to public education outcomes (Macedo 2011: 33, 41). This frame follows the biased-alternative model of the market and, in many ways, harkens to Reich's (1991) notion of the "secession of the successful" in which the affluent move into "privatopias" as a means of protecting their assets and lifestyle. It focuses on how charter school formation is "systematically biased in favor of those already advantaged of money, mobility, knowledge, and information" (Henig & MacDonald 2002: 963).

Fischel (2001) observed that "homevoters" are the most numerous and politically influential group within most localities due to their tax contributions and discernable political interest in protecting their home. "Homevoters" have a definable set of economic and governmental preferences, including wanting local schools to be of quality[33], as close as possible, and only as big as necessary (Fischel 2001, Ford 2011: 234). At a certain point, the rich would be better off to redraw the boundaries of the taxing authority so as to exclude themselves (Buchanan & Faith 1987). Extending this premise to public education, the more well-off may challenge district boundaries (and the racial, socioeconomic, and educational performance demographics of their student

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[32] Approximately 45 percent of school funds come from local coffers (Turner et al. 2016).
[33] Some challenge that the demand for school quality is more properly attributed to demand for "quality" characteristics of peers or neighbors (Saporito and Sohoni 2007, see also Frankenberg 2009:).

composition) to create a new district that provides similar services at a rate and scale more beneficial to themselves.[34]

It is, perhaps predictably, "middle-class, educationally oriented parents" who are most likely to exercise choice (Butler & Hamnett 2007: 1166) and seek ways (such as charter school development) to restructure the educational school system such that their interests are best protected (Renzulli & Evans 2005). Abrams (2019: 897) noted that charter schools "attract students of more engaged and affluent parents, leaving needier students behind and thus making the job of teachers in district schools that much more challenging." This theme illustrates how some use charter school formation to zone *in* and protect their contributions to public education while also protecting their fiscal, political, and social resources.

Equity

A key debate of public education is its intended target (Siegel-Hawley et al. 2018): Should delivery be narrowly tailored to support specific, individual students or to students more broadly and equally? A long-standing assumption following the 1965 Elementary Education Act (which, among other goals, distributed federal funds to TPSDs and schools with a high percentage of low-income families) and calls to racially integrate schools (Johnston 2015: 4) was that public schools were expected to produce democratic equality, social efficiency, and social mobility (Labaree 1997). The expectation was that

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[34] EdBuild (2019: 15), a nonprofit that focuses on the segregation effects of district-level secession, noted that "there are often disincentives for communities to stay bound to one another, especially for wealthy neighborhoods to remain joined with those that are poorer or more socioeconomically diverse."

public schools would advance academic achievement for all students to learn at higher levels (Stone 1998: 5).

Charter schools have been presented as one method of balancing (or attempting to balance) continuing racial and socioeconomic stratifications between schools and districts as they infuse choice and competition (Witten et al. 2003: 220). According to advocates, the rush to open charter schools by minority (Afro-centric, Latinx-centric, and gender-based) groups is out of dissatisfaction with performance and treatment in TPSDs (Fuller 2000, Wexler & Huerta 2000). In this sense, charter schools are viewed as "escape hatches from crumbling and dysfunctional schools, particularly for the poor and children of color" (Carr 2015: 66) and a pathway to help families overcome barriers to the school selection process (i.e., limited income, housing policies, and societal prejudices). Charter schools generally enroll a minority of the student population in most districts (Zimmer et al. 2009a).

Opponents, however, see charter schools as threats that *exacerbate* problems of equity and social justice. Competition for students between TPSDs and charter schools is expected to pressure charters into targeting ("skimming the cream off the top" or "cherry-picking") students with the highest performance and the least encumbered personal and social disadvantages. While some studies have found little evidence of skimming, others charge that charters may be "cropping off" services to high-needs or high-cost populations such as students with disabilities (e.g, Lacireno-Paquet et al. 2002).

Similar to Zoning, another concern is that white(r) and generally smaller, wealthier groups have "appropriated the rhetoric of charter school reform" to have greater control over local educational institutions (Fuller 2000). This trend has been promulgated

in popular news media. Kasakove (2019) called the latest wave of charter school development part of a "nationwide campaign to make schools whiter." Jeff Guo's (2015) *Washington Post* piece, "White Parents in North Carolina Are Using Charter Schools to Secede from the Education System," was labeled a "#1 Trending Story" by a North Carolina progressive policy blog (Schofield 2015). Systematic exploration of secession in charter school development is therefore warranted.

Conclusion

In this chapter, I considered how Voice$_1$ and Exit$_1$ may manifest in the context of Indiana's charter school development. Focusing on how actors respond to changes in charter school legislation and how they discuss their motivations and support (or lack thereof) for charter schools may illustrate, to the extent it is possible, crisis moments in the local educational landscape. Such crises may demonstrate actors portraying the TPSD as illegitimate with remedy to withdraw from TPSD governance and establish their own form of public education: charter schools. In the remainder of the dissertation, I explore whether (and how) the charter school constructs developed in Chapters 2 and 3 manifest in Indiana newspapers' editorial pages and consider if the conceptualization of charter school secession can be identified empirically.

CHAPTER 4: DATA AND METHODOLOGY

At this point, secession is only a conceptual possibility in the context of charter schools, and crisis events in Indiana's charter school development history that may point to secession or secession-like impulses are unknown. As a result, my research approach to investigate charter school secession is, by design, exploratory. As I discuss below, newspaper editorial pages are a forum in which community perspectives on community issues emerge, and editorial page units have the potential to illustrate citizens' dissatisfaction with the TPSD, positions on charter schools in the community, and if charter school creation is viewed as a form of dis-integration and/or integration. Absent significant prior research on secession in charter school contexts, this approach is designed to yield content-rich insights, rather than predictive or explanatory analysis.

Methodology

To explore the nexus of secession and charter schools in Indiana communities, I turn to actors' arguments, descriptions, and expositions responding to a charter school policy narrative in their respective communities. From this collection of individuals' and editorial perspectives, I explore whether and how the notion of secession, as conceptualized in Chapter 2, manifests in the discourse. The approach aims to be sufficiently broad enough to consider if charter school secession occurs and narrow enough to isolate and then consider, in light of broader sociopolitical and cultural contexts, specific cases of charter school secession.

Discourse analysis embodies four central premises:

conceptualization of discourse as a collective construction; intervention of social and cultural norms, which determines roles and relationships of the participants, as well as the contents of the messages; social and interactive character of language; (and) dynamics of the enunciation (Suciu 2019).

I use a social-cultural approach (Upton & Cohen 2009, Titscher et al. 2000) to discourse analysis to move beyond content analysis, which examines and quantifies the content of documents, and examine how language was used in texts *and* contexts (Gee 1999: 82). This helps unite theory and textual analysis (Rogers & Wetzel 2014, Titscher et al. 2000: 150) and expose underlying assumptions and subtle messages in the political discourse (van Dijk 1993, Gee 1999, Wenden 2005, Upton & Cohen 2009: 586, Schiffrin et al. 2003).

Discourse Analysis of Secession

Measuring secession is difficult and varied in approach, but prior research has demonstrated that such sentiment "can be inferred from newspaper records of secessionist collective actions" (Hechter 1992: 268). As a result, analysis of secession reflected in newspapers has emerged as a methodology to better discern the decision-making calculus for actors of secession, an essential variable to measuring secession (Hechter 1992: 268). While some (but not all, see Huszka 2014 for more on how simultaneous discourses can be leveraged) use this approach to explore the rhetoric of well-defined, highly intentional pro-independence movements (e.g., Aronovitch 2006, Beldarrain-Durandegui 2012, see also Crespy 2015 on nationalist discourses), the analyses tend to focus on an "us versus them" framework between actors in the discourse. Accordingly, this study considers whether an "us versus them" *secessionist* sentiment emerges in editorial perspectives on charter school discourse.

As noted in Chapter 3 (especially Figure 4), I conceptualized charter school secession as a multi-faceted construct. What, then, is the best approach to determine crisis moments regarding the TPSD, explore the nature of charter school exit and independence from the TPSD, and identify secession actors (and reactors)? In the case of school district secession, Siegel-Hawley et al. (2018) observed that six new suburban school systems emerged one year after the Shelby County-Memphis city-county school merger. They then interviewed relevant stakeholders about those events. While an interview approach would be especially helpful to engage actors directly about their decisions to form a charter school and whether they purposefully sought or recognized their actions as secession, difficulties arise in terms of identifying relevant actors and events across time and cities. Further, and more fundamentally, identifying newly formed charter schools fails to parse the difference between charter school *exit* versus charter school *secession*.

A necessary first step, which this study considers in the case of Indiana, is to contextualize the community factors and actors that may present the *preconditions* of secession (Wood 1981). Editorial dialogue provides a backdrop to explore community-wide perspectives on charter school development. As the developed inventory of text is broadly anchored on the key term "charter school," editorial page items may focus on a variety of issues related to charter schools, including but not limited to policy development, performance, local growth and reception, funding, and accountability. This forum allows prominent actors affecting and affected by charter schools to emerge and be identified. Further, it allows actors' speech to illustrate reasons for or against charter school creation and proliferation. Lastly, it allows actors of secession, those seeking it and those trying to prevent it, to participate in the same forum, offering a more holistic

perspective on secession (see Ker-Lindsay 2017: 8). Through its breadth of newspapers and quantity of items analyzed, it provides a wide swath to consider whether the secession constructs developed in Chapter 2 manifest.

Benefits and Limits of Approach

I argue that the discourse encompassed in editorial pages allows political, social, economic, and community-specific factors to emerge that may provide the motive and context for actors to secede. This approach is not intended to evaluate newspapers' coverage of all charter school development within its readership area. Instead, the analysis is designed to explore differing positions and perspectives on charter schools that emerge in the local and public forum. The resultant community-specific dialogue is not expected to be continuity of coverage or authors (i.e., same actors writing across the same time or city) but rather a spectrum of actors reacting to and considering the development of charter schools within their communities. These perspectives emerge as a discourse through which to explore the charter school secession constructs, to the extent they are present: $Voice_2$, $Exit_2$, and $Loyalty_{CharterSchools}$ and their component parts. It uses actors' written voices to directly animate and reflect secession themes.

As a link between charter school formation and secession has not yet been established, and crisis events motivating secession are not known *a priori*, the approach must be broad enough to explore the preconditions and narrow enough to explore the factors affecting the calculus of secession. Limiting exploration of secession to Indiana's charter school development will allow uniformity of intrastate factors affecting local communities. The timeframe assessed and the scope of discourse analyzed offer robust data exploration across multiple communities (an approach defended by Stubbs 1997)

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and is expected to allow gradual and immediate changes affecting charter schools to emerge. This may impact secession impulses which can emerge gradually or immediately (Wood 1981: 120). Lastly, the reflexive qualitative design allows multiple iterations of analysis to consider whether theory matches application.

This project is subject to critique on grounds of objectivity. In fact, many discourse analysis projects are commonly criticized because "political and social ideologies are read onto data rather than revealed through the data" and "there is an unequal imbalance between social theory and method" (Rogers & Wetzel 2014: 155). To temper this constructivist tendency, "in which reality is literally 'talked and texted' into existence" (Reed 2000: 525), my goal is to be transparent about my analytic process and findings. I used index and analytic memos to help manage the breadth of qualitative data and refine it in such a way as to be analyzed and presented. Concerns can be tempered by the firm position that this project is exploratory and the rich nature of data generated may help future studies.

Data

Data for this project are full-text, editorial-page items (columns, commentary, editorials, and letters to the editor) collected from newspapers published from 1990 to 2014 in Indiana. A total of 1,245 editorial items were considered in final analysis, representing 40 newspapers[35] and 38 cities in Indiana.[36]

The timeframe analyzed spans January 1, 1990, to December 31, 2014. These endpoints were selected to allow for discourse related to the 1991 passage of the first

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[35] Appendix B, Figure B.1 displays locations of newspapers under analysis.
[36] See Appendix B, Figure B.2 for list of newspapers and number of editorial pieces considered per paper.

charter school legislation in the country and its reception in Indiana to emerge. The

December 31, 2014, endpoint was used based on readily available data and because the

2014-2015 academic year marked Indiana's transition to "new, more rigorous college-

and-career ready standards and a new statewide assessment to measure these standards"

(IDOE n.d.). This range allows state and national commentary on the passage of key

relevant federal policies (i.e., 2002 No Child Left Behind and the 2009 Race to the Top),

as well as the emergence of policy networks at various pressure points that supported or

discouraged the creation of charter schools (Mintrom 2000, Cookson & Berger 2002).

Benefits to Editorial Page Items

News media—newspaper editorials, in particular (Entman 2007: 165)—have a

role in framing and responding to events and public policy affecting the community

(Miller & Riechert 2001, Campbell 2002, Entman 2007, Feuerstein 2015). The editorial

and op-ed pages ("editorial pages") present the newspapers' editorial positions and

additional mediated viewpoints (e.g., Tumin 2017) from newspaper staffers, community

leaders, *and* readers. On these pages, actors construct versions of reality to persuade an

(imagined) audience that their perspectives are desired for the public good. As Carr

(2015: 51) noted, anyone who wishes to share a written opinion can do so in this forum,

though access and inclusion may be challenged (Entman 2007; see van Dijk 1993: 259-

260). Editorial page items are generally uniform in terms of style across newspapers (i.e.,

comics, columns, commentary, editorials, or letters to the editor).

Editorial page items are easily accessible to conduct analysis and appropriately

oriented to meet the aims of the research questions. Editorial page items anchored on the

issue of charter schools will present a variety of community actors' written perspectives

(voices) reacting to a broader community event. Through reactionary positions, editorial pages will help expose prominent actors, forces, and events affecting and affected by charter school development in the community. Items may singly or collectively coalesce around a central event or crisis point related to charter schools in the discourse, which may offer greater insights into the charter school secession under investigation.

<p align="center">*Limits to Editorial Page Items*</p>

While editorial newspaper pages may (or not) be the forum for secession actors to mobilize and share propaganda, this *may* be the forum in which actors (or reactors) air grievances against the TPSD and share perspectives on mobilization around such efforts. Further, these grievances and actions may be so disruptive to the community that they warrant editorial coverage from the newspaper staff and/or commentary from readership.

Molotch (1976: 315) noted that newspaper businesses and their staffs have a vested interest in supporting city growth. In addition to a social or democratic principle of supporting local public education, newspapers prop up local education in order to attract more readers (residents) to increase its circulation. Through content and decision-making bias among newspaper staff, actors with more political, social, and cultural capital (i.e., power) tend to command more attention, credibility, and coverage (Entman 2007: 167, see all van Dijk 1993: 255-257). As a result, these actors have greater influence on shaping public discourse and policy (Stone 2001, Entman 2007). Voices that might evidence (or thwart) secession may be eclipsed simply because they did not make it into the forum. Newspapers as an industry have undergone "historic restructuring" in recent decades (Kirchhoff 2009), which may also limit the actors seeking newspapers as a public forum. Nonetheless, this study is designed to explore, to the extent it is present,

secession in Indiana's community newspapers related to charter schools using the

constructs developed from Hirschman's guiding voice, exit, loyalty framework.

I take great care to distinguish between editorial, newspaper staff, and other

voices in the discourse analysis but also recognize the interested role of newspapers in

supporting a charter school development agenda as a means of attracting and retaining

residents in its readership area. As a former newspaper reporter, I also note that the

newspaper industry and professionals pride themselves on presenting news and opinions,

including contrary community positions, as a matter of journalistic principle.

Sources

Data were identified in 40 Indiana newspapers from three databases noted for

their significant inventory of U.S. community, state, and regional newspapers. Every

effort was made to keep query searches parallel across databases. Data were identified

using the following search criteria:

> *Query=((1990 to 2014) AND ("charter school" OR "charter schools") AND (letter or column or commentary or editorial)*

Using free resources available through the University of Louisville, I identified data from

Access World News (33 newspapers met inclusion criteria), U.S. Newsstream (6

newspapers met inclusion criteria), and Ethnic NewsWatch, comprised of newspapers by

African American press presenting "overlooked perspectives" ("About Ethnic

Newswatch" 2018) (1 newspaper met inclusion criteria).[37] To ensure these databases

were representative of a variety of newspapers published in Indiana, I cross-checked titles

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[37] As charter school secession is associated with a movement for or against local/grassroots control of education, I also considered Alt-PressWatch, a database featuring newspapers by minority and grassroots press. No Indiana newspapers that met inclusion criteria were identified in this database.

against major circulation lists produced by Cision Ltd., a public relations and marketing company. The top 10 Indiana newspapers by circulation developed by Cision (Staff 2014) were captured in at least one of the databases.[38] In instances of duplication of newspaper titles across databases, data were considered from the database offering longer date coverage.

Addressing Anomalies in the Data

Due to a variation in how the *South Bend Tribune* coded document types (articles were grouped under "newspapers" rather than "news" and "editorial"), I reviewed 602 newspaper articles directly, classifying 96 pieces as a letter, column, commentary, or editorial. For the remaining newspapers, I relied on databases' or newspapers' classification system to identify data.

Newspaper timelines varied considerably in their editorial coverage and content related to charter schools. This may be due, in part, to limited community and/or newspaper interest in charter schools at a given time and limitations to the newspaper databases from which data were gathered. For example, there were no editorial items in the *Post-Tribune* from 2009 to 2012. It is not clear why this gap occurred. The *Munster Times*, another newspaper with coverage of Gary, Indiana, had data during those gap years, however.

Additional Observations on the Dataset

As would be expected, editorial page items appeared most frequently in major (by circulation) Indiana newspapers. The highest number of articles focus on charter schools

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[38] See Appendix B, Figure B.3.

in Indianapolis, as reflected in coverage in the *Indianapolis Star* (211) and *Indianapolis Recorder* (147). Other high-article newspapers in the dataset included: *Munster Times* (148), *Evansville Courier & Press* (111), *South Bend Tribune* (96), and *Post-Tribune* (85), and *Herald Bulletin* (73).[39] Chronologically, the first editorial item in the dataset was published October 12, 1993, in the *Evansville Courier & Press*, and the last piece was published December 28, 2014, in the Munster *Times*. Paxton Media Group, of Paducah, Ky., owned 10 newspapers during the study's timeframe, and CNHI, LLC (formerly Community Newspaper Holdings, Inc.) owned eight.

Data Identification & Analytic Framework

The multi-stage process of identifying data, as well as the central analytic steps in evaluating it, are described here. I include snippets of relevant database searches to illustrate the development of data identification and to justify my approach.

Step One: Testing Newspaper Salience of "Secession"

First, I performed a preliminary salience test of the term "secession" and its variants in charter school-related newspaper items. This tested the supposition that "secession" is rarely used in charter school rhetoric and affirmed my approach to analyze secession *components*. An initial search[40] of all newspaper items (independent of newspaper section) in the databases revealed 671 total pieces.[41] When I controlled for location (Indiana), the returns were even fewer: only 11 news items, 2 of which were

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[39] See Appendix A, Figure B.3 for a full listing of newspapers and article counts.
[40] Search query = *Newspaper Item= (("charter school" OR "charter schools") AND ("secede" or "seceding" or "seceded" or "secession"))*
[41] 267 *news items* in Access World News, 394 articles in US Newsstream, and 10 articles in Ethnic NewsWatch

editorial items. Albeit small, this test demonstrated that "secession" and its variants is

reflected directly in editorial items related to charter schools, suggesting its utility in

future content analyses. Next, I determined the total number of *editorial items* (1,849) out

of *newspaper items* (10,932) reflecting "charter school" or its variants in Indiana

newspapers. I deemed this set a reasonable body of discourse to begin data indexing to

explore whether secession was part of the discourse reflected in editorial page positions

on charter schools in Indiana.

Step Two: Editorial Item Indexing

My next step was to determine which of the 1,849 editorial news items would be

included in final analysis. In initial indexing, I excluded items if improperly labeled

"editorial" in the databases (e.g., *South Bend Tribune* grouped editorial items with news

items) or if they were part of an interstate newspaper beat with exclusive coverage of

another state's charter school development (e.g., *South Bend Tribune*'s Michigan beat).

Other excluded items included passing references to charter schools as places of

employment (e.g., editorial item focused on a community member who previously held a

position at an out-of-state charter school) and meeting, forum, or safety notices held at a

charter school (with no agenda or mention of charter school creation or development). No

items were excluded based on positions related to public education, charter schools, or

TPSDs.

If the piece was considered for analysis, I then evaluated it using an analytic

coding scheme (see Figure 5), adapted from instruments used in previous discourse

studies (e.g., Wenden 2005, Carr 2015). This scheme helps identify, aggregate, and

systematically analyze discourse, thereby converting raw data into categories and themes

(Titscher et al. 2000: 58-59). Each piece was examined for both discursive ("surface") and dispositive (social contexts within which discourse is embedded—i.e., actions, institutions, and policy development) elements. Ultimately, each piece was considered singly and as part of a wider corpus of texts.

In Figure 5, I include tentative expectations regarding how each factor might manifest in the data. I also include two additional metrics for the indexing process: technical information for each analyzed article (including the name, location, date, and author's name of each piece), and the author's positionality on charter and/or public schools and rhetoric appeal to the reader. I made note of any peculiarities in each piece, particularly if the piece met the threshold for inclusion but did not reflect any discernable secession component. I also tracked if specific documents or policies were exposed in each piece such as references to charter school legislation, policy proposals, charter school applications, records from school board meetings, or other references to archival documents.

Figure 5: Charter School Secession Coding Scheme for Discourse Analysis

Secession Component	Description	Analytic Research Questions	Expectation
Voice$_2$	Crisis of legitimacy regarding the local school district; may threaten charter school exit	(1) Who is talking? (2) What are they saying with regard to the local school district? charter school mode of governance? (3) When are they saying it?	• Variety of actors • Dominant themes and reactions related to charter school formation • Expressed threats to form charter school as political bargaining with local school district
Exit$_2$	Charter school formation is considered the means of transferring independence away from the district	(4) Do actors associate impendence with the charter school form? How is this expressed? (5) How is this call received in the community/by the author/other actors? (6) Are there contextualizing clues regarding organizational environments of charters schools?	• Varied perspectives regarding charter school adoption, implementation, and post-implementation • Consideration of both formal (e.g., formal charter school applications) and informal (various capital needed) organizational factors • Attempts at independence will be contested
Loyalty$_{Charter School}$	Commitment to charter school mode of governance	(7) How do the actors express this commitment? (8) Is commitment to preserving *place* part of their defense?	• Explicit statement of support • Place-based identification to a home, community, commitment to stay in place (anti-mobility)
Additional Information Collected during Editorial Item Indexing			
Technical Information	• Newspaper, newspaper location • Article title, date, author, author title • Editorial item type: letter, column, commentary, editorial (other?)		
Author Positionality	• On charter schools, public schools • Rhetorical appeal		

Step Three: Identifying Charter School Secession

The final analytic step was to assess whether the combined weight of indexing revealed clearly discernable cases of charter school secession. This step focuses on the circular and reflexive nature of discourse analysis, wherein assumptions of theory and methods are identified, operationalized, data is collected and interpreted, and observations are examined—and reexamined—in light of earlier theory (Titscher et al. 2000: p. 14). Descriptive index notes were organized—and reorganized—and interpreted

along many different patterns. I reviewed pieces individually, collectively, and in various combinations (e.g., date, location, author, editorial item type, inclusion of stakeholders, audibility of frames, and constructs), to reflect on commonalities and whether and how secession constructs manifested.

I focused heavily on instances when specific charter schools were proposed (and opposed), if and when specific communities emerged as contentious "battleground" locales between charter school and TPSD stakeholders, and whether educational administrative leaders and politicians were named or quoted directly. I was also attentive to core "outside" groups and actors (i.e., those who were not local residents but involved in the educational decision-making processes). Lastly, I was attentive to counterfactuals and silences in the data. I captured my observations at each stage of analysis in descriptive memos, which helped generate a more holistic perspective of the discourse and the social, political, and cultural undercurrents contained therein. The weight and analysis of these observations are presented in Chapters 5 and 6.

CHAPTER 5: FINDINGS

Findings are presented in two parts. This chapter relates key actors in the discourse, including those who *wrote* the discourse and those who were the *subject* of it. In total, 1,245 editorial items were considered in discourse analysis. Data were coded into 27 topics, 12 subthemes, and the three charter school secession constructs: $Voice_2$, $Exit_2$, and $Loyalty_{CharterSchools}$.[42] This process helped expose actors' perspectives on and reactions to charter schools along four reaction types (Figure 6). Generally, the dominant exchange was a "battle" between actors of the "C Team," advocating for charter schools, and "T Team," trying to preserve the integrity of the traditional public school district (TPSD) in light of new competition. However, as discussed below, analysis exposed conditions related to two sets of actors engaged in a secondary form of conflict—one in which they sought independence from the TPSD through new district creation.

This chapter relates how data reflected $Voice_1$ and $Exit_1$ constructs, which when matched with the secessionist claim and goal of independence (discussed further in Chapter 6), reveal specific cases related to secession. With the notable exception of Indianapolis, which pitted the mayor's charter school efforts against IPS for two decades in the discourse, only a handful of communities were identified as having disruptive events or enduring discourse related to charter school formation. Discussions of these sites, all larger cities, are discussed throughout this chapter and the next.

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[42] See Appendix C, Figure C.1 for the coded topics and themes.

		CHARTER SCHOOL FORMATION	
		YES	NO
SECESSION	YES	**CELL #1: "C Team Plus"[a]** **(Based on Single Case of Roger Parent)** ● **VOICE$_2$**: Freedom, Choice as claims motivating call for exit from TPSD ● **EXIT$_2$**: Formal and informal efforts to gain independence; met with resistance at *local* level ● **LOYALTY**: <u>unclear; public education</u>	**CELL #2: "New T"[a]** **(Based on Single Case of MCSA)** ● **VOICE**: Zoning, Efficiency[*] as claims motivating call for exit from TPSD ● **EXIT**: Formal efforts to create a new district; met with local *and* state resistance; encouraged to pursue charter school formation ● **LOYALTY**: <u>non-charter school model</u>
	NO	**CELL #3: "C Team"[b]** ● **VOICE$_1$**: Charter school formation as Freedom, Choice, Efficiency, City Retention, Zoning, and Greater Parity/Equity > local school model ● **EXIT$_1$**: Formal and informal efforts; viewed as legitimate, viable, and desirable ● **LOYALTY$_{CS}$**: <u>charter school model</u>	**CELL #4: "T Team"[b]** ● **VOICE**: Anti-charter school rhetoric; charter school formation as Less Equity/Parity > local school model ● **EXIT**: Formal and informal efforts to protect the integrity of the school district ● **LOYALTY**: <u>district model</u>

[a] These are labels I have assigned and are not directly reflected in the discourse.

[b] These labels are pulled directly from the data and refer to "Charter" and "Traditional" teams.

[*] This was identified as a relevant factor in *supplementary* information, not directly in the dataset.

Key Actors: Who Is Talking?

Key actors in the dataset fell into three dominant categories: a very small set of actors threatening and calling for independence from the TPSD, those advocating for charter school development, and those advocating for maintaining the integrity of the local school district. These actors were parents, lay/community residents, interested civic and business leaders (including newspaper staff and editorial boards), and political leaders at the local, state, and national levels.

The editorial board of the Bloomington *Herald-Times* classified charter formation

discourse as a battle between the "C Team"—those in the education community who

support charter schools often by denigrating the traditional system—and the "T Team,"

or the "current education establishment, including teachers' unions and administrators or

school board associations and some university professors" who preserve traditional

schools and are often anti-charter school development ("Time to Think About Change"

2010). The editorial team wrote:

> C Teamers think the institution is bloated, that teachers' unions have too much
> control over quality (usually through such job guarantees as tenure), that
> administrations are too interested in building and maintaining empires instead of
> teaching kids and a whole lot of money is wasted as a result… ("Time to Think
> About Change" 2010)

This classification was helpful to identify relevant discourse sets in the data.

Secession-Like Actors: "C Team Plus"[43] and "New T Team"

Importantly, data did not illustrate actors' preferences on secession, nor were

actors characterized as recognizing their actions as "secession." However, actors

identified as pursuing independence from the TPSD based on associated grievances were

familiar with the institutional processes of the TPSD. They appeared before board

meetings to voice their complaints and pursued efforts with educational actors outside of

the TPSD in order to initiate new district formations. One movement was led by a single

actor in the discourse, while another movement was led by a group that mobilized in-

person and through online media. These actors pursued two different forms of exit:

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[43] I fall short of labeling this movement "secession," given the limited context in the data. It is
distinguishable from charter school formation, however in that it illustrates a clear attempt at independence
from the TPSD using the charter school path of exit. See Chapter 6, in particular.

charter school formation and district formation. The only references to the terms "secede" and "cede" were made by the local newspaper editorial team in reference to the district secession case.

The "C Team" and "T Team"

The "C Team" included Indiana's governors and state superintendents of instruction, who were referenced prominently in the data. Other members included interested business leaders and "choice" advocates who published columns.[44] Some in this group promoted charter schools as complementary and necessary to improve traditional public schools: "Charter schools are not created in opposition to other public schools. They are complements, enhancements and incentives to improve the traditional district system," stated Mary Ann Sullivan (2002), director of the Indiana Charter School Alliance. More prominent through the discourse among charter advocates, however, was the idea of charter school creation and proliferation as necessary and superior to district schools. For example, in a letter to the editor, Anderson resident Edwin "Bus" Upshaw (2009) applauded the state's embrace of the charter school form as an alternative to the failures of TPSDs: "Parents have rebelled, rightly so, to a system that rewards failure in teaching and promotes cronyism above competence."

Representatives of the "T Team" coalition were gleaned primarily through citizen letters to the editor or columns from TPSD leaders. A few pieces from representatives from the Indiana State Teachers' Association called for high teaching certification

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[44] Notable columnists included representatives from Mind Trust, an outgrowth of Indianapolis Mayor Peterson's charter school program; Project E Indiana, a (now former) pro-charter organization; the Charter School Association of Indiana; and GEO Foundation, a charter school operator based out of Indianapolis.

standards for charter school teachers. With the exception of Anderson Community

Schools Superintendent Felix Chow who wrote several columns in the *Herald-Bulletin*,

most education leaders—representing both the "C" and "T" teams—emerged only

occasionally and primarily to address an event (typically regarding school performance or

the opening or closing of a school).

Letters to the Editor

Lay perspectives, in the form of letters to the editor, appeared in all newspapers

with more than 10 articles in the dataset. Most citizens submitted only one letter and were

overwhelming writing to their "home" newspaper. These letters often viewed public

education as a zero-sum landscape, favoring traditional schools *instead* of charter schools

(or vice versa), while some lamented the general state of public education in both.

Editorial Voice

Editorial voice serves as a point of community leadership through institutional

stands on issues. Nineteen newspapers published editorials related to charter school

formation and development. Most positions were supportive of charter school growth and

development *alongside continued support* for traditional public schools. The *Indianapolis

Star* editorial team wrote: "Indianapolis needs both strong traditional public schools and

sound alternatives such as charters. The trick is to find the right balance when it comes to

resources and emphasis" ("Consider Charters Outside IPS" 2006). Similarly, the *South

Bend Tribune* repeatedly stated that their annual editorial position was to support

innovation in public schools, including charter schools.[45] Rod Bohannan (2000), of the

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[45] See, for example, "Agenda for 2004" 2004, "Agenda 2005" 2005, "Agenda 2006" 2006.

Indianapolis NAACP, criticized the *Indianapolis Star*'s reporting and balancing, however, noting that their "positions taken regarding public education can be viewed only as strident advocacy for choice, charter schools and vouchers."

Editorial voice was also diffused through columns, with two notable columnists. Amos Brown of Indianapolis' *Recorder*, Indiana's longest-running African American newspaper, wrote a weekly column, "Just Tellin' It," for 14 years of the dataset that focused on education issues related to African Americans in the city. Interestingly, Andrea Neal emerged first as an *Indianapolis Star* reporter who covered the city and state education beat. She then appeared in the discourse as a regular and widely syndicated columnist who signed her pieces as a teacher at St. Richard's School (a private, religious school) in Indianapolis and adjunct scholar with the Indiana Policy Review Foundation. Her first piece, as a newspaper writer, emerged in the data in 1998 and her final piece, as an interested teacher and professor, was in 2012. Her byline occurred most frequently in the data, appearing in 25 percent of the newspapers analyzed. She was an obvious member of "Team C," championing policies and politicians that furthered charter school expansion and showcasing successful charter schools as models for the state.

Newspaper syndication and common ownership also impacted the editorial voice. A statehouse reporter published a handful of columns that were carried in multiple newspapers, and nationally syndicated columns (originating in the *Washington Post*) appeared in major dailies. Occasionally, syndicated pieces were printed with different headlines or slightly edited versions across newspapers. As noted above, Neal's columns were published in 10 of the 40 newspapers analyzed, often appearing in multiple newspapers within one week of original publication.

The editorial "voice" of newspapers diminished over time in the dataset, suggesting that the issue of charter schools was less important from an editorial page standpoint over time. This may be attributable to the educational debate diminishing, shifting, or becoming eclipsed by other interests, or, perhaps in-line with trends of diminishing newspaper staffs and circulation, the newspaper editorial board produced fewer position pieces in general.

When Actors Speak

Editorial items began in 1993 but rose notably in 2001, coinciding with the state's adoption of charter school legislation. The number of editorial items dipped slightly but then continued to rise steadily until a marked increase in 2011, coinciding with significant changes to state charter school policy. Notably, editorial page items appeared beginning in 2011 from newspapers in more rural areas and papers not yet represented in the dataset. The following figure illustrates the number of editorial pieces in the dataset by year of publication.

Figure 7: Number of Editorial Pieces in Dataset by Year of Publication
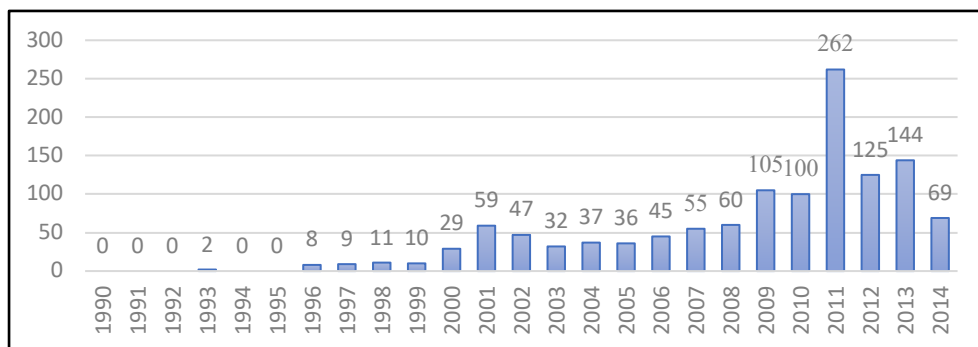
Voice$_1$

In this section, I relate dominant charter school formation themes identified in the data. Only two—Innovation and Autonomy—were associated with a claim of charter exit

as a means of withdrawing from a specific district's authority. Zoning was associated with district-level secession. In Chapter 6, I consider directly how these themes manifested with their corresponding secession cases (Voice$_1$ + claim = Voice$_2$). Notably, the Equity, Economic Development, and Efficiency formation themes, though dominant in the discourse and heavily contested by the "T Team," were not associated with a secessionist claim.

TPSDs Lack Innovation

This theme was among the first to emerge in the data—nearly a decade prior to the approval of Indiana's charter schools—and was a prominent driver in shaping charter school adoption. The *Evansville Courier & Press* editorial board encouraged support for the "innovative" charter school model as early as 1993 because "the problems of the worst schools are so intractable that simply sticking with failed programs is the wrong way to go" ("Worthy Experiment" 1993). Multiple editorial boards lauded the new, niche curriculum proposed by charter schools,[46] although a few critics pointed out that similar curriculum was already available in public school magnet programs.

Discourse related to Evansville's Signature School focused on its innovative, high-performance design and curriculum. The school, which sought (December 2001) and was approved (February 25, 2002) charter-seeking conversion status from the Evansville Vandenburgh School Corporation (EVSC), was the state's first public charter high school. The *Evansville Courier & Press* editorial team was reluctant to endorse the

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[46] Various initial proposals around the state included a zoo charter school, "college prep" and STEM-focused models, and a "'gay school' for children who are struggling with their sexuality or for teens who want to attend school in a tolerant atmosphere" ("Insight: Capitol Notebook" 1999).

school's application: "The best we can say is that we have yet to hear or read a compelling argument in favor of the proposal" ("School Board Will Consider" 2002). They cautioned, however, that "when we, as a community, automatically turn our backs on change, we limit our potential" ("Charter School" 2002). The conversion proposal drew editorial page input from a teacher and student at Signature School encouraging community support for the charter school's authorization.

With regard to the idea that teachers are "freer" to innovate in charter schools compared to district schools, there were minor debates regarding teacher collective bargaining and certification requirements. Teacher unions said the enabling charter legislation should have collective bargaining in charter schools, but the final passage stipulated that charter school teachers could elect to join a union. More debate emerged in 2011 regarding charter school teacher certification. Many charter authorizers only required 50 percent of its teachers to be certified, which some challenged as deficient standards (Robb 2011, Richards 2011, Eiler 2011, Howey 2011b). Led by Superintendent of Public Instruction Bennett, charter school supporters argued that a lower certification requirement would allow qualified professionals in the community (e.g., lawyer or business leaders) to teach without a license.

Charter Schools Offer Greater Autonomy in Education

This perspective focused on how charter schools offered those "locked" in the city the opportunity to make their own educational choices when otherwise unable to pursue private school or move beyond the city perimeter (Robinson 2002). The *Recorder*, in particular, emphasized this point during the state's charter school legislative adoption. Of course, while supporters lauded parents' ability and role to make these decisions, one

undercurrent—similar to critiques of choice in housing mobility scholarship (Imbroscio 2004)—was that attending charter schools was a *privileged* choice. Only families with the ability to transport their children (since buses are not guaranteed), meet charter schools' parental obligations (i.e., chaperoning or servicing events), and knowledge of the lottery enrollment process have a choice (Robinson 2003).[47]

While the role of vouchers in shaping Indiana's charter school formation is beyond this study, the notion was familiar to Hoosiers in the study's dataset and further illustrated perspectives of competition within the sphere of public education was necessary to spur TPSD growth. Vouchers were often presented in-line with charter schools, and often support for one was presented as support for the other. The voucher model idea was presented early—1998 in South Bend—as a means to help racial balancing ("Milwaukee Example No Argument" 1998) and to ultimately pass charter school legislation in the state:

> Charter school sounds like a great idea. It keeps being talked about but in this area nothing has been done. If it becomes a reality, it will be because of vouchers or the threat of vouchers. Why? Unless there is competition it is very difficult to change the status quo. ("President's Agenda" 1999)

Others points to the *loss* of autonomy in charter schools due to state and national influences. According to Rusty Nixon, director of development and alumni affairs in Plymouth Schools,

> It also seems strange that many who have been so vocal about having more personal control of their child's education are so willing to give it up [to charter schools]. Locally residents have complete control over their school corporation—they elect their own school boards from local residents who run for those offices.

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[47] One unique justification for public choice was that it offered choice to *teachers*, not just students, in public education (Thiery 2011).

(Nixon 2011)

Effects of Zoning

The notion of zoning (i.e., creating a new TPSD) to protect property was presented during an instance of significant structural changes to the Anderson Community Schools, discussed further in Chapter 7. Group leader Troy Abbott, an Anderson doctor, encouraged residents within the proposed district boundaries to approve the measure. He was quoted as saying: "So I think this is something people would like to see their property value climb instead of decline like they have been for several years now" (qtd. in Morello 2012).

The perceived *effects* of charter school zoning were identified in the data, particularly from those who had initially embraced charter school adoption but then questioned its racially segregating effects. In the final year of the data analyzed, the *Recorder*'s Amos Brown (2014b) insinuated that charter school development in Indianapolis may have served as a tool to zone out low-performing and Black students. He denounced the city's education reformers who "have continued to disseminate the 'falsehood' of *white* flight [to the suburbs] due to failing IPS" (2014b) and argued the more pressing issue was *black* segregation in the urban core:

> I maintain that Indianapolis is experiencing a 21st century 'tipping point' as non-Hispanic white families leave otherwise great neighborhoods, with good quality public schools, because white students in those areas are no longer the majority (Brown 2013b).

He claimed that if city leaders wanted to leverage charter school formation as an economic development strategy, they would implement them in township neighborhoods and more white students would attend them. Brown and his fellow *Recorder* columnists

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increasingly presented evidence to support what early critics had charged as "racist and classist" (Rademacher 2000) effects of charter schools.[48] The geographic placement of charter schools—for example, "concentrating several charters in the Meadows area" (Brown 2014b)—furthered this racial segregation.

Charters Schools as More/Less Equitable Compared to TPSDs

Data related to this frame focused on how pupil enrollment by race or ability, per-pupil funding, school performance, and facilities and student transportation were contested between charter and district school advocates. Charter school advocates, particularly in Indianapolis, were quick to embrace charter schools from the outset, viewing them as an equitable alternative for lower income[49], non-white families. The Indianapolis *Recorder*'s Amos Brown (2001) initially welcomed charter school adoption as an escape from the failing IPS, which ranked "dead last" in the rankings of district performance in Indiana. He blamed IPS' woes on several factors, particularly former Indianapolis Mayor Steve Goldsmith "who spent years disparaging, humiliating, castigating and verbally lynching the city's public schools."

> IPS has suffered enough. Our public schools endured the evils of a segregated system, years of fighting desegregation; decades of forced one-way busing. IPS has been victimized by an insensitive, small town-oriented Legislature that annually deprives IPS of fair and equitable funding so IPS facilities could keep up with the township schools. (Brown 2001)

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[48] Brown (2008) noted significant increases of black enrollment in mayoral charter schools compared to IPS. Shabazz (2010) stated that the majority of African Americans stopped attending IPS beginning in 2003 with the advent of charter schools. According to Brown (2014b), as of 2014, 9 of the 13 public schools in Indianapolis labeled "severely segregated" (enrollments 90 percent or higher black students) were charters.
[49] The *Indianapolis Star*, for example, emphasized how "Charters extend the right to choose to lower-income families" ("Consider Charters Outside of IPS Lines" 2006).

Another *Recorder* columnist claimed that any attempts by "progressive" black elected officials to block charter school development would only perpetuate "keeping Black students in failing public schools" (Shabazz 2010, 2014). A third *Recorder* columnist encouraged readership to encourage charter school growth.

> It really becomes annoying to hear all of the opposition to the charter school movement…. Either this current system needs a total overhaul or we all should welcome alternatives such as vouchers or charters in an effort to try something else….we cannot continue to sit idle and allow almost half of our students to fail to meet the standards in math and English. (Robinson 2002)

By the end of the dataset, however, Brown questioned the support for charter schools in the city, sounding the alarm on the "all-white legion of 'education reformers' who've used their influence fueled by money from out-of-state wealthy patrons…to provide 'quality' education to Black and minority children" (Brown 2014a).[50] This finding suggests that race played a dual role in shaping charter school development in Indianapolis: during the initial adoption of charter school legislation, charter schools were viewed as a positive gain for black students, but over time, these developments were viewed negatively for black students.

On the issue of enrollment disparities between charter schools and district schools, the "C Team" advocates were quick to point out that, by law, charters are open to all students and opposition was a red herring. For example, according to Russ Simnick (2009), president of the Indianapolis Public Charter Schools Association:

> Since no student can be denied entry to a public charter school, and no student can be given preference because of athletic or academic prowess, arguments that charters have unfair advantages fall apart. It is time for public charter school detractors to stop the discrimination and give credit where it is due.

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[50] The topic of race-based zoning is discussed further in "Zoning Frame" later in this chapter.

The "T Team" rebuttal was framed in a *de jure* versus *de facto* perspective: while

charters are legally open to all students, they are not required to keep students enrolled if

they fail to meet standards, leading, they charged, to lower district test scores and inflated

ones for charter schools. Further, in practice charter schools "will only get students

whose parents are motivated enough to submit the applications" (Hertzog 2004).

The topic of per-pupil funds presented another "bruising battle" (Neal 2003)

within the state's charter school development, forcing local districts to position

themselves as competitors in the public education marketplace. In 2002, the general

assembly approved funds to follow the student upon enrollment at their public school of

choice. The Munster *Times* editorial team stated:

> In school funding, as with the rest of life, there are winners and losers. And with
> school funding, the winners should be the students…. If that sounds inefficient,
> blame it on the way school districts are tied to their current geographic
> boundaries, not on the General Assembly's decision to have dollars follow the
> student instead of propping up districts with declining enrollment. ("We Pick
> McDermott" 2007)

IPS Superintendent Eugene White, for example, stated: "We are now preparing every

school and every program to compete for students…. Students don't belong to us. They

belong to the community, and we must serve them or lose them" (Pulliam 2006).[51] This

view of charters schools as direct financial competition fueled a view of public education

through a zero-sum lens: any dollar, student, teacher, bus, or building given for a charter

school was a dollar, student, teacher, bus, or building taken away from public schools

(Riley 2007, Bingle 2011). For example, during a challenging state budget, the *Post and*

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[51] But when faced with significant enrollment losses in 2011, White announced that IPS would not continue
to enroll IPS-neighborhood students who transferred back from a charter school back after the mid-
September enrollment deadline as IPS was losing millions in the transfer (Brown 2011c).

Mail editorial board wrote: "Precious resources sent to private and charter schools would benefit the traditional schools already living under 2010's budget reductions" ("Public Funds for Private Schools" 2011). While some pieces considered how differences in resources impacted student performance, very few considered direct community-wide comparisons of results between a local school and its "feeder" charter school.

Charter Schools Help Shore Up Cities

This frame presented in two ways in the data: charter school formation as means (1) to attract and retain residents and (2) to shore up and revitalize decaying city spaces, which the TPSDs were unable to do. In the case of Indianapolis, the *Indianapolis Star* editorial board claimed that IPS' enrollment drops "long predated the advent of charters," with financially mobile families leaving the district due to its failing schools, seeking township, suburban, or private schools ("Consider Charters Outside of IPS Lines" 2006). By the late 1990s, the busing of black IPS students to township schools was phased out and charter school legislation was being heavily considered, particularly in Indianapolis, as a means to pull (mostly middle-class White) families from the suburbs to the city (Neal 2000, Neal 2007a, "Blame-Charters Crowd Needs Lesson" 2008) and keep students from "fleeing" once they arrived ("Charting a Course for Charters" 2011).

Similarly, the *Times* embraced charter schools in Gary following the exodus of jobs and people once the steel industry collapsed. Formation emerged as a city-wide campaign to stymy a "dying" city by improving school quality and ultimately attract more residents.

> The primary reason enrollments grow or shrink is that people choose to move into school districts with better reputations. Thus the quality of instruction is often the reason for declining enrollment in the first place….School officials

should…innovate….Give magnet schools and charter schools a chance to succeed or fail. ("We Pick McDermott" 2007)

In-line with the supposition that newspapers are interested growth drivers (Molotch 1976), newspaper editorials and columnists largely took the position that unoccupied local school district buildings should be rented or sold to interested charter schools. For example, the *South Bend* editorial board supported Gary Community School Corporation's sale or rent of old buildings to prospective charter school formers, calling the opportunity a "welcome ray of hope for a city plagued by eyesores and magnets for crime of countless abandoned structures" ("Supervise Charter Schools Well" 2009). "T Team" supporters had trouble offloading unused buildings, however, planning to save them for future use or to prevent charter schools from gaining access to them. The *Recorder'*s Amos Brown noted:

> When asked why IPS isn't looking at closing schools, (Acting IPS Superintendent Dr. Peggy) Hinckley said the district was fearful of helping "the competition" because if IPS abandons a school, then a charter applicant could obtain it free, under state law. So, IPS would rather be in debt, laying off employees, while holding on to buildings that are far from full that they don't need, just to keep it from a charter? Absurd! (Brown 2013a)

State legislation ultimately forced this point, dictating that local school districts must release unused public buildings for nominal rent after a specified window of non-use. This move was criticized as yet another measure of the state limiting local school board power: "It's certainly a challenge for charter school organizers to raise capital to obtain and often renovate buildings, but the state shouldn't take away school boards' ability to make decisions about how best to use public properties ("Case against Charters Falls Apart " 2011).

TPSD Criticism of Charter School Efficiency

Charter schools conceived as a more efficient model compared to the local school district was not a dominant theme in the discourse. Passing references to smaller class sizes in charter schools and the ability for charter school educators to focus on teaching rather than school management were identified. For example: "Not every charter school has been a success, but most are seeing consistent test score gains. They are doing so with less money per student than regular public schools receive (Neal 2009b)."

The "T Team" opposition was framed such that public education should not be judged by business values. According to Jeramy Townsley (2011), an adjunct professor of sociology at Butler University and an independent candidate for city-county council in Indianapolis: "The fact is that business is different from governance. The business model for education—competition, pay-for- performance, an emphasis on productivity and efficiency—is fundamentally different from public, universal education…" Another critic, Superintendent of Merrillville Community School Corporation Tony Lux, called charter schools part of a "'snake oil'" illusion without any verifiable degree of profitability….The reality is that the proliferation of hundreds of charter schools creates more financial loss to public schools, as well as inefficient spending due to more staffing and profit-taking sponsors" (qtd. in Ross 2011).

Exit$_1$

This construct considers the factors that emerged in the discourse that actors identified as affecting the ability to form charter schools (Exit$_1$), as well as a discernable goal of charter school formation as independence from a TPSD. I identified two institutional forms of exit considered by actors seeking independence from TPSDs: a

proposal to create a charter school and a separate proposal to form a new traditional

school district, both of which were met with local resistance. Those cases are discussed

more directly in Chapter 7.

In the remainder of this section, I note the broad and increasing consensus

regarding the state's political role of furthering charter school development but low local

demand to form charter schools. Relevant topics include legislative developments, the

role of political leaders in shaping this legislation (and discourse), perspectives on how

public and private schools could convert to charter schools, and the ability for charting

groups to "shop" around for authorizers. Lastly, by the end of the dataset, there was a

shared recognition of the isomorphic tendency for charter school structures to resemble

those of TPSDs. This combination of factors may have impacted charter school secession

in two ways. First, it may have (excessively) increased the ease of charter school exit and

minimized the friction of $Voice_1$. Second, it may reflect a lack of secessionist interest to

use the charter school form.

Legislative Developments

Little data directly addressed the merits of the enabling charter school legislation;

instead, most data centered on "C Team" and "T Team" debates about the local, state and

federal roles in furthering charter school implementation and growth. This "hot rhetoric"

(Hayden 2012) manifested across newspapers and the length of the dataset, and it was

evident that the editorial voice of newspapers played a key role in shaping it. The data

ended with a wide acceptance, to borrow from Ravitch (2013: 252), that "charter schools

are here to stay and more will continue to open" and shifted to a debate on whether public

funds should be directed to private schools (via vouchers) or whether control of charter schools should be overseen by private universities.

Compared to the rest of the country, "Indiana was slow getting on board the charter school movement and was able to incorporate some proven best practices into its charter school program" ("Education: Charter Schools" 2004). By its tenth year of implementation, 84 charter schools operated in the state ("Case against Charters " 2011), relatively slower growth compared to Ohio and Michigan (Elliott 2015). Advocates increasingly called for greater state support to strengthen charter legislation; this call for expansion was justified, they said, based on long waiting lists to enroll in charter schools, polling data (see Lubbers 2007), and performance (e.g., Neal 2009a, 2009b).

Several reasons were offered for this slow embrace of the charter school movement. Some attributed it to initial implementation hurdles such as failure to provide aid or state loans for the school's first semester of operation—a "practical joke" by lawmakers ("Legislators Play Their Games" 2002) "that no doubt has kept some promising charter school proposals from becoming a reality. Most…have had to beg, plead or borrow to get started" (Neal 2007b). Legislators remedied the issue in 2002 by allowing charters to borrow startup money—although "few, if any [had] the capital to go that route" (Neal 2007c). In response, charter school critics pointed out that the innovation and appeal of charter schools "is that they tend to be started by entrepreneurial, visionary leaders" (Peirce 2004). Others blamed tepid growth to the caps to the number of charter schools each authorizer could approve (Elliott 2015). Others pointed to the Indiana State Teachers Association "and its tactics to destroy such programs as charter schools" (Brademas 1998).

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Critics also pointed out the state's preferential treatment to charter schools, forgiving loans for charter schools (and failed charter schools)—a move they said was inefficient and unaccountable ("Charter Schools Should Pay" 2013). Others pointed out that the average state-funded tuition support was higher for students in the charter schools versus public school districts in the state's grant application for federal Race to the Top funds (Mellish 2010). An *Indianapolis Star* editorial warned that caps or other hindrances to charter school development could divert federal money away from the state ("The Big 3" 2009).

In contrast to expansion, some called for moratoriums. In December 2008, state representative Vernon Smith, of Gary (D), called for a full-stop on approving new charters in order "to protect traditional school districts from the competition." Smith's plan was defeated, which the *Indianapolis Star* editorial board celebrated as the plan "defies a principle of the marketplace."

> If families seeking an alternative are artificially denied access to charters, they're likely to seek another choice. In Indianapolis, that means a further exodus from inner-city neighborhoods to suburban districts. In fact, that is a chief reason why the mayor's office, under both Democrat Bart Peterson and Republican Greg Ballard, has been not only a sponsor but also a champion of charter schools. The mayor wants to keep families in the city. ("Blame-Charters Crowd" 2008)

IPS Superintendent White called on Mayor Ballard to halt new charter school formation in an effort to stop the district's hemorrhaging of students to charter schools. The *Indianapolis Star* recommended collaboration between the Ballard and White but did not support the moratorium. Amos Brown, of the *Recorder*, sided with White, however: "I strongly favor pausing on creating more charters within the IPS district until a comprehensive study's been done on the charter's impact on the district" (Brown 2009b).

Ballard's response was to focus on approving only new "quality" charters as opposed to blanket approval of all applications (Brown 2011a).

Ultimately, legislation passed in 2011 expanded the number and type of authorizers, added a new state charter board, and enabled private universities and mayors in cities with more than 35,000 people to serve as authorizers. Parents with children in poorly performing public schools could also demand that their school be converted to a charter—a "parent trigger" option—if 51 percent parents voted in favor of conversion. The *Indianapolis Star* editorial board claimed, "Each entity is a reasonable recipient of such power" ("Case against Charters" 2011).

Specific Calls to Create Charter Schools

Outright calls to create particular charter school schools were rare and isolated in the dataset with little evidence of community-wide support. Notable examples are listed here. Kim Briggs, a former resident of the Gary area who wrote from St. Paul, Minn., wanted a charter school to emerge following a closed district school: "I call for current and former residents and businesses and resources (like Methodist Hospital) in the Horace Mann area to develop a charter high school (i.e. math-science academy) at Mann's site" (Briggs 2004). A second example was when Dan Kovas of South Bend called for the community to vote to convert Washington High School to a charter school to avoid a state takeover: "With the nearly $300 million that is currently being misallocated by the South Bend Community School Corp. each year, we can create a supermarket of educational options that will drive the social and economic resurgence of our community" ("Voice of the People" 2011).

School Type Conversions

Emphasis on which charter school form actors could create emerged in the discourse. In addition to start-up charter schools, conversion from private (particularly religious schools with declining enrollment) to charter (e.g., "Joshua Academy" 2004) and punitive (state-mandated or "parent trigger") were identified. This punitive notion was that charter schools would be a forced, corrective option for traditional public schools that failed to meet goals outlined in No Child Left Behind. The conversion case of Evansville's Signature School is discussed further in Chapter 6, but few conversion cases were identified in the data outside of references to punitive formation due to failing TPSD schools.

The notion of virtual charter schools, which shifted education delivery away from a "brick-and-mortar" institution to one managed online, emerged amidst the 2011 statewide elections and related legislation on educational reforms. There were concerns that approving and implementing virtual charter schools would affect both urban and rural traditional districts: "all 292 school systems would be subject to losing students (and dollars) to virtual charter school" (Phillips 2011). The state was slow to adopt virtual charter schools and issued an initial two-year moratorium on funding them.[52]

Authorizer Types

The "T Team" reaction viewed expanded authorizer choice as a threat. Democratic State Senator Jean Breaux stated that any non-local school board authorizer

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[52] The initial proposal to pilot virtual charter schools through Ball State University's chartering authority was viewed as expensive with little accountability—but still promising to state legislators (Briganti and Williams 2007).

was a "grave mistake" (Eiler 2011). When Ball State University stated its intention to become an authorizer, superintendents in the Allen County school system (Fort Wayne Community Schools and East Allen Community Schools) protested by refusing to place Ball State student teachers in their classrooms. The move drew fire from the "C Team" and illustrated community frustration with the local "educational establishment." In a column, Bohanon and Coelho (2001) wrote:

> But the mere prospect of Ball State having some role in the formation of a charter school is enough to unleash a response that purports to punish such evil thinking by refusing to hire Ball State University students. The superintendents' actions manifest what is wrong with the public schools: Their administration.

Despite the call from editorial boards and state political leaders for new chartering authorizers to emerge, data indicated there was low demand: "But it's just not happening. Only Carmel and Evansville have taken advantage of the law" (Neal 2003). According to Neal, Sen. Lubbers (R-Indianapolis), who sponsored the initial charter school law, was open to giving more mayors the authority to charter schools provided that they "sprint up from grassroots support." Mayors in Gary and other cities were quoted as saying that they did not need or seek mayoral authorizing power because chartering authorities were already bringing charter schools to their cities (Neal 2003).

Political Leadership

The role of political leadership contributed significantly to charter school development in Indiana, and, at least in one clear instance, was instrumental in suggesting that a group pursue charter school formation as a means to withdraw from the local school district and establish their independence—the very definition of charter school secession considered in this study. Superintendent of Public Instruction Tony Bennett,

Gov. Mitch Daniels, and Indianapolis Mayor Bart Peterson (and later to a lesser degree Greg Ballard) emerged as central, and often polarizing, figures with clear charter school development agendas. The "T Team" response was summarized in a column from Carolyn Peterson, the 2009 South Bend Community School Corporation Teacher of the Year, who stated that politicians should not make educational decisions and their continued support of charter schools took away from public schools (Peterson 2010).

Bennett campaigned on a pro-charter school agenda and public education reform, but local education leaders and teachers questioned his credentials and support of district schools. Why, for example, was Bennett qualified for the state's top education post when he was previously the superintendent of a "failing" school district? Bennett's wife was also addressed frequently in the data for her role as a consultant with the Indiana Public Charter Schools Association. William Sniadecki, vice president of the South Bend Community School Corporation, noted: "I would think that would be conflict of interest except that it seems his interests do lie in charter schools also. (Bennett) would like all schools to be charters" ("A Time to Fix Schools" 2010).

After Bennett lost his bid for reelection to Democratic challenger Glenda Ritz—what some called a check on charter school development in the state, he later became mired in political scandal for his role in changing an Indiana charter school's performance grade from a "C" to an "A."[53] Bennett's critics called the grade change and

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[53] Facetiously, Amos Brown (2014d) commented: "Bennett's failed system absurdly labeled one of Indiana's most expensive high schools with a 100 percent graduation rate of top-notch students (Park-Tudor) equal in quality to an inner-city high school with a 61 percent graduate rate (Arsenal Tech)." Bennett then changed Park-Tudor's performance grade.

lack of transparency political opportunism to protect the charter school's founder, a

Bennett campaign donor (to the tune of $130,000). Nevertheless,

> Bennett deserves credit for shaking the sleep off an education system that was
> unwilling to embrace significant change. It's true that Bennett is a polarizing
> figure, and his methods of imposing change caused unnecessary strife among the
> ranks of educators, particularly his disdain for listening to teachers' concerns.
> ("Damage is Done" 2013)

Aided by Bennett, the state board of education, and a Republican legislative

majority, Gov. Mitch Daniels sought to usher in a "freight train of change" regarding

education initiatives, including charter school expansion, in 2011 (Howey 2011a).

Changes included legislation allowing (1) state takeover of poorly performing public

schools, thus removing local decision-making and enabling them to be managed by for-

profit companies; (2) vouchers for families to receive taxpayer funds to send their

children to their (public or private) school of choice; and (3) expansion of charter school

authorizers. All three hit concurrently, which opponents said was a direct attack on the

traditional district: "The leaders of the majority do not want to improve public education.

They want to dismantle it," said Scott Pelath, State Representative from Michigan City

(Nixon 2011). The "incredible concentration of power and authority of management of

local schools at the state level is unprecedented" and alarming to local districts (Coker

2011). After Daniels told the *Indianapolis Star*, "If this is an end to public education as

we know it, I saw thank goodness," state legislator Ed DeLaney stated, "I think there is a

direct assault on public education and they won't say it" (Brown 2009a).

Bipartisan support for charter schools emerged clearly and early in the discourse,

with editorial boards supporting Democratic gubernatorial candidate Lt. Governor Frank

O'Bannon's education plan, which included support of charter school legislation to boost

poor-performing school districts, over Republican Indianapolis Mayor Steve Goldsmith's plan to reward high-performing school districts ("Staying the Course" 1996). Bipartisan support was identified as instrumental in passing charter school legislation after seven years of debate (Pulliam 2008, "Creating Charter Schools" 1999, "Charter Schools an Option" 1999). Debates focused on the types of authorizers, charter school funding, collective bargaining rights for teachers, and whether applications should have an appeals process. Mayor Bart Peterson also worked to secure its passage, "taking multiple hits from his Democratic colleagues in the process" (Mutz 2012).

In the case of Indianapolis, the state department took over several failing IPS schools (Brown 2011b) and the mayor simultaneously increased the presence of charter schools in the city. Russ Pulliam, associate editor of the *Indianapolis Star*, observed how Peterson's authorization power relied on business leaders to shape the city's "education problem": "What charter schools have done is create a vehicle for [business and civic] involvement [in education]. Before, all they could was criticize or run for the school board" (Pulliam 2006). According to *Indianapolis Star* columnist Dan Carpenter, the mayoral power to authorize, combined with the state's continuing intervention of closing IPS schools, was part of a "makeover/takeover plan" that strategically involved "the gelding of the IPS central office and the disempowering of central city voters as well as teachers' unions" (Carpenter 2011).

> The plan was straightforward: Get the administration, the board, the union, the messy local politics "moved out of the way," and impose a simplified education market in which families' choices will be limited to consumer choices. And first, by all means, declare the system broken…. (Carpenter 2011)

Isomorphism

Actors in the dataset increasingly noted that charter schools inevitably look like, behave like, and morph into the traditional public school model: "Charter schools are a change and they do offer viable options for parents and students, but most of them are really an extension of the public school setting," wrote the *Recorder*'s Leroy Robinson (2003). Curriculum and approaches were considered similar by charter school critics: "but this is exactly what our existing schools do" (Hertzog 2004). A financial officer who worked in the charter school movement and served as an elected member of his hometown TPSD school board noted from his joint position:

> Charters have very little freedom. They are required to meet the same educational regulations as traditional schools. Conversely, traditional schools have many of the same freedoms that charters do if they choose to exercise them. (Johnson 2011)

Data also demonstrated growing acceptance that "charter schools are here to stay" ("Charting a Course for Charters" 2011) and a noticeable pivot by TPSDs to incorporate charter school principles into their operations. Three examples illustrate this point. First, Evansville Vanderburgh School Corporation Superintendent Vince Bertam championed "equity schools":

> [T]he purpose of equity schools is to evaluate the specific needs of each school and then target programs to those needs. These schools will have greater autonomy with curriculum and programming, somewhat similar to how public charter schools operate ("Equity Schools: The Issue" 2009).

The *Courier & Press* editorial board applauded the Evansville Teachers Association's support to implement this plan and called for more such innovations in public schools.

Second, in 2011, Gov. Daniels signed Senate Bill 575 into law, which "frees traditional public schools to experiment with the things Indiana charter schools do now"

and limited teacher union collective bargaining to salaries and wage-related items (Neal 2011). This allowed traditional schools "to initiate changes that previously required union approval, whether in the school calendar, the daily schedule or even the structure of the school itself" (Neal 2011). It also had, as discussed in this chapter, the added impact of fueling rhetoric that state administrators prioritized charter schools over district schools.

Third, new IPS superintendent Dr. Lewis Ferebee—with the support of newly-elected "reform-minded school board leaders," Republican buy-in and support beyond IPS boundaries—championed a state bill in 2014 to create "innovation schools" (Brown 2014c). These new schools would operate inside existing IPS buildings, much like the original charter school design,[54] and IPS would retain some of the money for those students' enrollment in exchange for ensuring the schools' academic performance using the state's accountability grading system (Brown 2014c).

Loyalty_{CharterSchools}

Loyalty to charter schools was identified in two dimensions in the data: loyalty to the charter school form and loyalty to its ability to preserve place. The first dimension was gleaned most directly through newspaper editorials admonishing or lauding groups based on their perseverance to the charter school form as opposed to other types of exit. For example, after initially criticizing the group because it was fragmenting the community ("School Choice: Fragmentation" 2003), the *Palladium-Item* editorial team stated, "The parents and teachers of Citizens for School Choice are to be admired for

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[54] See Bulkley and Fisler 2003 for more on early designs of charter schools.

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sticking with their beliefs" ("Richmond Schools: Our Children's Future" 2003) after trying for three years to start a charter school in Richmond.

With regard to the second dimension, discourse revealed that the loyalty to the charter school model was based on its ability to preserve place and community. In the case of the proposed New Tech Charter School (discussed further in Chapter 6), Roger Parent "threatened to launch" a charter school after appealing to the local TPSD to adopt a particular tech-based program for students in South Bend. In areas of significant mobility due to school closures or consolidations, the State Superintendent of Instruction Tony Bennett presented the charter school model as a means of preserving a local school community in light of closure (see MCSA case in Chapter 6).

Missing in the Discourse

Little rhetoric focused on contentious elements of charter school operations, such as public versus private management and transparency of chartering authorizers. This may be because Indiana, under Bennett's leadership, passed legislation that encouraged the state and local schools to contract with private managers in "state takeover" schools. Combined with the state's notable philanthropic and entrepreneurial spirit (Pulliam 2006, Johnston 2015), private involvement in public education may not be viewed as controversial in Indiana compared to other states.

Conclusion

This chapter provided a descriptive overview of the discourse, noting how the 1,245 editorial page items (columns, commentary, editorials, and letters to the editor) from 40 Indiana newspapers provided an intrastate backdrop to explore how $Voice_1$ and $Exit_1$ constructs manifested in the data. Consideration of these factors, using a helpful

conceptualization from the Bloomington *Herald-Times*, helped establish a baseline for the "C Team" and "T Team" debate in the data. Data presented here illustrated how the charter school development debate was both venerated and despised by those in the discourse. As I considered the intersection of the secessionist goal of independence and direct claim against a TPSD within this wider debate, the analytic process revealed four reactionary types at the intersection of charter school formation and secession. Further consideration of the emergent cases related to secession are discussed in Chapter 6.

CHAPTER 6: EMERGENT CASES RELATED TO SECESSION

This chapter relates specific attempts of secession in the data, including one case approximating the conceptualization of charter school secession developed in Chapter 2, one case of attempted district-level secession, and illustrative examples of district loyalist efforts at unification (see Figure 8). Illustrative charter school formation cases were discussed in Chapter 5. These cases correspond with the "ideal type" heuristic conceptualizing the intersection of charter school formation and secession (Figure 1), as well as the reaction types identified and discussed in Chapter 5 (Figure 6). I used supplementary information gleaned through area newspaper coverage and public documents to further explore the secession cases, particularly to better understand the political bargaining processes and how the movements were negotiated. One such negotiation reflected a state representative proposing charter school formation as a decentralization strategy to minimize the prospect of district-level secession.

*Figure 8: Cases Related to Secession and Charter School Formation
in Discourse Analysis, 2x2*

		CHARTER SCHOOL FORMATION	
		YES	NO
SECESSION	YES	**CELL #1: Charter School Secession** *Case of Roger Parent and Proposed New Tech Charter School* ● **VOICE**: Frustration with local school board's failure to adopt specific curriculum; claim of charter school exit ● **EXIT**: met with community leaders, school district and Ball State officials in multiple negotiations; resistance from editorial newspaper board and local school board ● **LOYALTY**: *public education* (charter school or TPSD) based on ability to adopt curriculum	**CELL #2: Non-Charter School Secession** *Case of Madison County School Alliance* ● **VOICE:** Frustrations with local school district's closure of school and forced consolidation; claim of district exit ● **EXIT:** appealed to state board of education, local school board, and newspaper; resistance by local, state (encouraged charter school formation), and newspaper actors ● **LOYALTY:** *new TPSD*
	NO	**CELL #3: Charter School Formation** *Evansville's Signature School (conversion)* ● **VOICE:** More Freedom, Autonomy, City Retention compared to TPSD ● **EXIT**: District-supported conversion status ● **LOYALTY**: charter school model *Indianapolis (initial adoption)* ● **VOICE:** Innovation, Autonomy, Zoning, Equity, City Retention, and Efficiency > IPS ● **EXIT**: Strong support from community, state & editorial teams. ● **LOYALTY**: charter school model	**CELL #4: *Status Quo/District Integrity*** *Cases of Anderson Community Schools, Richmond County Schools (initially)* ● **VOICE**: District unification; anti-charter school rhetoric ● **EXIT**: District-denied charter school application ● **LOYALTY**: TPSD

Charter School Secession: "Threatened to Launch a Charter"

This case considers how one central actor, Roger Parent, "threatened to launch a charter" school when the South Bend Community School Corporation (SBCSC), of which he was a school board trustee, failed to adopt a particular technology curriculum.

Given his commitment to adopt the curriculum, he turned to the possibility of charter school creation as a means to circumvent the TPSD and bring the curriculum to the community. While this case embodies charter school secession as conceptualized in Chapter 2 at multiple points, it falls short of that understanding as Parent appeared committed to whichever institutional form of public education would adopt the curriculum—with the local school district as his first choice.

The Claim: TPSD Failure to Adopt Curriculum

The movement was identified beginning in 2009 in the *South Bend Tribune* and continued in the dataset into 2010 across four editorials and two letters to the editor. After the SBCSC voted 4-3 against adopting a "New Tech" technology-based learning concept to be administered in the district's Studebacker School, Parent "threatened to launch a charter school" so the opportunity could still be available to students in South Bend ("Time to Step up for New Tech" 2009). While the corporations' trustees claimed that they liked the concept, they were quoted saying that the district could not afford the estimated $5 million start-up costs over the first four years of the program.

According to the *South Bend Tribune's* editorial team, the new tech concept had significant community support, a building, and an administrator but lacked the money to proceed. Despite the wide community interest and a call for the community to find other financial ways to support the concept, the editorial board admonished Parent for the threat and told the community to drop the notion of forming a charter school.

> All involved must aim at the same goal, not work at cross purposes. For Trustee Roger Parent to threaten to launch a charter school was inappropriate. And the Chamber of Commerce would be way out of its league if it attempted the overwhelming endeavor of creating a high school from scratch. ("Time to Step up for New Tech" 2009)

Bargaining with the "T Team" for District-Sponsored Charter School

Parent "vowed" that he would start the charter school (New Schools Inc.) to

ensure the model's implementation for students in the area (Dits 2010). He pulled

together a board and, five months later sought SBCSC, the local district, as the chartering

sponsor:

> In fact, Parent and other New Schools members said they would prefer that. Their
> hope, they said, is that the school corporation would take over the New Tech
> school in three to four years and that New Schools would then dissolve itself (Dits
> 2010).

In a turnabout, the *South Bend Tribune*'s editorial position called for SBCSC to support

and sponsor the proposed charter school, calling it a "win-win" as SBCSC could not

afford to sponsor "New Tech" in-house:

> What the school system can afford, however, is to provide sponsorship and a site
> for a New Schools Inc. charter New Tech High School (*sic*). That offer has been
> on the table since January and the trustees have yet to give New Schools an
> answer. That answer should come now. And it should be "yes." ("New Schools
> Plan" 2010)

In a move "that many people are left scratching their heads over," the local school

board (SBCSC) rejected 6-1 the New Schools' request to sponsor a charter school.

Superintendent James Kapsa cited "severe budget crisis" as the reason for the local

school board's rejection of the proposed charter school. The *Tribune* editorial board

called it a "costly mistake," as an independent charter school would incur significant

start-up costs in addition to the cost of curriculum implementation. Further, Parent had

openly said the plan was to create the charter to adopt the curriculum, let its contract

expire, and then move the students and curriculum back to SBCSC—maneuvering which

the *Tribune*'s editorial board approved: "The quality of education is what matters, not

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whether it takes place in a public school system or a charter school" ("Moving Ahead with New Tech" 2010).

Outcome

Faced with inability for the district to sponsor a charter school, Parent said that he planned to submit the charter school application to Ball State University for authorization ("The Challenge for New Schools" 2010)—*unless* the district moved forward with a plan to adopt the New Tech concept *inside* of local Riley High School (a school-within-in-a-school model) by Fall 2011 ("Moving Ahead with New Tech" 2010). Despite the threat, Parent did not submit the application to Ball State, and the local district adopted the New Tech model. Initial demand for the New Tech program was "growing fast and soon will be too big for its wing at Riley High School" (Kilbride 2011). The school was "rebranded" in 2014, however, after it did not meet enrollment expectations (Kilbride 2014b).

District Secession: Standard "Divorce" or State-Suggested Charter School Secession?

A second crisis moment was initially identified in the data through a letter to the editor. A district school board member noted that in the recent past, "a relative few tried to split the community and create their own school system" (Green 2012). This letter, classified as part of the "T Team," focused on ensuring TPSD integrity but pointed to a previous attempt at district secession in the community. Using additional news stories from the *Anderson Herald-Bulletin*, in tandem with the editorial item dataset, I traced this "split" reference to the Madison County School Alliance (MCSA), a "grassroots group" (Morello 2012) that tried to create its own TPSD. Charter school exit emerged as a

bargaining tool proffered by the state superintendent of public instruction to prevent the creation of a new TPSD.

The Claim and Form of Exit

The MCSA claim against the local school district was in response to statewide public school consolidation efforts that would force Highland High School to consolidate with Anderson High School. A group of loyal parents sought to prevent consolidation and preserve the school community by creating a new TPSD district. The proposed East Madison School Corporation (EMSC) was designed to pull from Anderson Community Schools Corporation (ACS) and include Highland, Killbuck, and Valley Grove schools, covering sections of Lafayette, Richland, and Union Townships in Madison County (Morello 2012, Alliance 2010d). According to MCSA President Troy Abbott, the group sought the new district for its location (Morello 2012), ability to offer smaller classes, greater control over tax increases and the school budget (Alliance 2010e), and its ability to "keep our community together" (qtd. in Essex 2011).

The movement was reflected, in part, in the Anderson *Herald-Bulletin*'s editorial pages. For example, Stephen Sylvester, of Anderson, criticized the Herald Bulletin's coverage and ACS' position toward the secession effort, stating that "there is nothing either elitist or separatist about the MCSA proposal."

> The proposal in total has everything to do with addressing the sad state of educational achievement in ACS and the challenge for change in the proposed two new school districts. On the other hand, blind belief that the present system serves the best interests of either all students or taxpayers is simply a myth—or just an angry rebuttal to preserve the status quo. (Sylvester 2010)

Herald-Bulletin letters to the editor and editorials that emerged earlier in 2009 indicating tensions in the community regarding the "rapid change" in the ACS school system (Mootry 2009). ACS held a series of meetings seeking public input about the merger, during which Highland High School parents asked the district not to close the school. The editorial board favored consolidating into one school, however ("Given ACS Trends, One High School Makes Sense" 2009).

MCSA Mobilization

Following an initial MCSA meeting February 4, 2010, the group detailed provisions needed to start their own district, including staffing, building needs, electoral mechanics, population requirements, and transportation changes. The group listed frustrations over which schools the ACS board planned to keep open, lack of ACS financial stability, its declining school population and increasing consolidation of schools, and poor academic performance as reasons for their new district proposal (Abbott et al. 2010). The MCSA developed a (since-deactivated) website[55], and a (since-deactivated) Facebook group page,[56] with activity in the Facebook forum ranging from February 8, 2010, to June 3, 2012.

Bargaining with the "T Team"

The MCSA group attempted to meet with the local school board and were directed to the state department of education. The group submitted a feasibility study to the Indiana Department of Education on April 30, 2010. The proposal was accepted May 26 for the IDOE's June 2 agenda, but the group received notice two days later that State

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[55] www.madisoncountyschoolalliance.com
[56] https://www.facebook.com/Madison-County-School-Alliance-298086622763/

Superintendent of Public Instruction Tony Bennett would not present the proposal to the state board of education (Stafford 2010, Alliance 2010c). In Bennett's letter dated May 27, 2010, he stated that deannexation runs counter to initiatives established by the Indiana Commission on Local Government Reform and that the MCSA must first have approval from the local school board (Morello 2012).

The editorial board agreed with the Bennett's decision: "In a time of economic uncertainty—with unemployment lingering high, few new jobs on the horizon and public funds barely able to keep up with demand—communities need to rally together to give strength to what they have" ("Bennett's Call on Alliance" 2010).

Rhonda Ballard-Gottschammer (2010) criticized the Herald-Tribune's editorial coverage in a letter to the editor. She said the division "goes deeper" than trying to preserve school mascots: "Why can't this re-organization be seen as positives for everyone? Why can't it be noticed that this re-organization will create jobs lost by the budget cuts of ACS?" The MCSA then turned to ACS directly to try and establish an agreement that a split was necessary and would benefit both groups.

"T Team" Response

ACS did not budge on MCSA issue—a position that the *Herald Bulletin* editorial board applauded ("School Board Should Decline" 2010). MCSA tried for months to present their proposal to the ACS board but was waylaid by procedural obstacles, and when the opportunity to present arrived in December 2010, the board said that a presentation was unnecessary and then voted unanimously to reject the MCSA proposal outright ("School Alliance Fails" 2010). ACS board president Scott Green said he did not agree with MCSA's plan: "This is just not what is in the best interest of ACS at this

point. I appreciate their concern about the school system. I had some of the same concerns that they had. We just chose different ways to deal with it" ("School Alliance Fails" 2010).

ACS representatives shaped the district's position as that of a "dying city" with a community-wide objective to bring unification via high-quality public education rather than quantity (i.e., "divorces" such as school fragmentation or charter school proliferation) (Chow et al. 2011). In a joint-letter, Felix Chow, Anderson Community Schools superintendent, Scott Green, president of ACS School Board, and Tom Forkner, president of Anderson Federation of Teachers, bemoaned the closing of General Motors' plants, which

> devastated the city's economic conditions, directly impacting ACS, which shrank from three high schools to one high school with fewer than 8,000 students (as compared to its peak of 20,000 students). The pending loss of the Wigwam is another reflection of the economic reality…. These and other markers of economic development are directly tied to the effectiveness of ACS. (Chow et al. 2011)

The trio emphasized that when "parents and students elect alternatives to ACS for education," they weaken the appeal of ACS as an economic driver—and then complain about decreasing home values and lack of local job opportunities. The remedy, they stated, was for the community to unite "on strategic direction to unify the Anderson community, not on dividing the district" (Chow et al. 2011).

Considering Charter School Exit

The *Herald Bulletin*'s editorial board encouraged the MCSA group to move on and for the community to heal ("Editorial: Time for School Leaders" 2010). Following rejection at both the local and state level, as well as the perceived negative portrayal in

the local newspaper, MCSA considered its next steps (Stafford 2010, Alliance 2010b).

Bennett himself encouraged the group to explore establishing a charter school if they still

felt strongly about breaking away (Stafford 2010). While the group had "shunned early

on" the prospect of charter school exit, they said they considered it "more in-depth"

following Bennett's decision, even meeting with Ball State University officials (Alliance

2010a). Abbott said: "As we investigated the issue, we decided that a charter school is

what you do if you have no other options….People where we live have other options.

There are other school corporations where they can send their kids" (qtd. in Morello

2012).

Efforts Turn to Address State Deannexation Policy

The group turned to legislative efforts, working with local legislators to introduce

a "parent trigger" mechanism to force state takeover of schools ("School Alliance Fails"

2010). When MCSA sought State Representative Jack Lutz (R-Anderson) as a backer in

2011 (HB1430), the bill did not receive a hearing. The proposal was reintroduced in

2012. "There are several other places in the state that'd like to do the same thing. There's

no process," Lutz told the *Herald-Bulletin* (Palmer 2012). ACS Superintendent Chow

testified against the bill, citing three main concerns: the majority population's position

should be considered, not just the "small dissatisfied population making the deannexation

decision," racial and social segregation impacts of a split, and a need for independent

verification of the financial projects between the "relinquishing" and new district (Palmer

2012). He said, "Like any divorce, it'd be fairly complicated" (qtd. in Palmer 2012).

Ultimately, the MCSA effort dissolved, though as noted in Chapter 3, Indiana has a

school incorporation policy (IC 20-23-4) in-place, though it is recently under reconsideration.

Other Notable Secession: Legislative Walkout

A legislative secession, or "walkout," was identified in the data when, à la *secessio plebis*, the Indiana Democratic legislative minority fled to Illinois in February and March 2011. The walkout, which prevented a legislative quorum, lasted almost six weeks and ended after the majority agreed to table three bills. While much of the focus for the walkout was on the anti-labor legislation that Democrats opposed, partially lost in the debate was the Democratic compromise on charter school expansion, school voucher legislation, and limiting teacher collective bargaining rights to wages and benefits ("Fourth Week: The Issue" 2011). That legislature ushered in a wave of charter school-related reforms, including expansion of authorizer types and virtual charter schools.

This example is instructive for two reasons. First, it reflects a form of secession in Indiana's governing culture as politicians physically withdrew from the state to enact political gains. Second, the secession illustrated how charter school development was a bargaining chip to politicians, with key Democrats compromising on efforts to stymy charter school proliferation due to other legislative priorities.

"T Team" on Maintaining the Status Quo and District Integrity

As illustrated in Chapter 5 and here in Chapter 6, the "T Team" perspective emphasized TPSD integrity. This manifested in different forms: framing charter schools as punitive, admonishing efforts to "break" apart community for short-sighted gains, and efforts to enact moratoriums and caps on charter school legislation. District loyalists

pointed to situations of misuse of charter schools (e.g., Bennett's grade change scandal) and mixed or worse performance results in charter schools.

When the "T Team" Transitions to "C Team"

On occasion, as in the case of Richmond, initial anti-charter school resistance shifted to support for charter school creation and development when it appeared to match community goals. For several years, the group Citizens for School Choice had tried to form a charter school in Richmond by seeking TPSD-approved charter sponsorship. The *Palladium-Item* editorial team noted that in April 2003, "Now is not the time to charter a new school" ("School Choice: Fragmentation 2003"). The charter attempts were rebuffed, particularly by Phyllis Amick, superintendent of Richmond Community Schools, as the district was undergoing "huge changes" ("School Choice: Fragmentation 2003"). In a period of multiple school closures and redistricting, "[Amick's] determined opposition also forced the community to seriously examine the pros and cons of having a charter school and whether the proposed plan would fit community needs" ("Richmond Schools: Superintendent" 2004).

The *Palladium-Item* editorial team congratulated the Citizens for School Choice Group on October 17, 2004, as the group had finally reached approval, via independent (Ball State University) sponsorship, to create Galileo Charter School ("Richmond: School Gets Charter" 2004). The editorial team had noted in 2003 ("Richmond Schools" 2003) that the group had increasingly sought efforts to incorporate community-based recommendations into their proposal, which the editorial team noted were more appropriate for the district.

The editorial team encouraged the community to support the school during its implementation phase and continued to support future efforts at charter school development designed to fill community needs. For example, later in the dataset, Discovery School Inc., which operated the Galileo Charter School, sought to open Excel Center Richmond, which would offer adult-learners the opportunity to earn a high school degree. The editorial team supported the move, and even Richmond Community Schools Superintendent Allen Bourff testified before the Indiana Charter School Board stating, "I would like to see this become successful" ("Welcome Show of Support" 2012). In January 2013, when Ball State University denied the charter (and appeal) for Kenneth A. Christmom STEMM Academy (formerly Galileo Charter School), the editorial team was surprised by the decision ("Openness Challenge for Charters"). Newspaper staff writer Dale McConnaughay (2013) commented that the denied appeal "was also very unsatisfactory, less for the outcome than for the high-handed and secretive manner it was carried out."

Discussion

This chapter considered two secession-related cases identified in the discourse, which were sparked by specific concerns with the corresponding TPSDs. The reactionary "T Team" response was to thwart both efforts to create new districts. Notably, the analysis of editorial page items helped expose these cases, which were then further investigated with additional news media. In both cases, the editorial item admonished the groups for trying to disrupt the community's educational landscape. Both cases occurred in 2009 and 2010, well after the initial adoption of charter school legislation and just

prior to a major educational reform year (2011) in which the state legislature expanded the scope and ability to open charter schools.

The charter school secession case identified in the data was a case of individual collective action, while the district secession case reflected collective action. Wood (1981) stated that a precondition of secession was "group solidarity," as well as the group's desire to self-govern. Parent explicitly called for and pursued charter school creation as a reactionary measure for district failure to implement the New Tech curriculum. His desire, ability to harness members and resources of the community, and the perceived legitimacy to pursue charter school creation were evident in the data. However, Parent clearly indicated that his end-goal was to use charter school creation as a means of adopting the curriculum and then transfer "ownership" back to the district once the charter dissolved. Thus, "independence" from the TPSD and loyalty to the charter school model were not clearly established in this case.

Parent, a former mayor of South Bend who served on the board for five years before resigning in 2014 (Kilbride 2014a), was both a member of the SBCSC and the primary shepherd of this charter movement. His "threat" to launch a charter school may have simply been a means of political gamesmanship to enact TPSD concessions—either (if necessary) SBCSC district sponsorship of a charter school to adopt the curriculum, or, as was the final result, SBCSC direct in-house adoption of the curriculum. The threat appears to reflect the *secessio plebis* example of the early Romans who temporarily withdrew to enact political concessions.

Neither case resulted in incorporation as a charter school, but both cases illustrate how local resistance fueled efforts to pursue independence. The following figure

illustrates the key actors, the threat, proposed district form, and outcome of the claim as could be best identified through additional investigation through newspaper records.

Figure 9: Summary of Identified Secession Attempts and Related Bargaining

ACTORS	TRADITIONAL PUBLIC SCHOOL DISTRIST	THREAT ISSUED	PROPOSED DISTRICT FORM	OUTCOME
Roger Parent, SBCSC Trustee	South Bend Community School Corporation	Counter-Proposal to Adopt Curriculum In-District	Charter School	Claim Resolved
Madison County School Alliance	Anderson Community Schools Corporation	Petition to Disannex Denied	District → (Counter-Proposal by State Official) → Charter School	Effort Dissolved

Source: Author

Findings in Chapter 5 illustrate the demand for charter school formation and the ensuing "battle" of voice and exit between advocates and opponents of local school districts versus charter schools. Findings analyzed in this chapter illustrate only one *near* case of charter school secession. Thus, this study offers limited support for the notion of wide-spread secession underlying charter school development in Indiana. Final thoughts on the project, its findings relative to the conceptual framework, and future research opportunities are discussed in the final chapter.

CHAPTER 7: CONCLUSIONS AND RECOMMENDATIONS

The first goal of this exploratory study was to consider the conceptual underpinnings of secession in the context of charter schools using Hirschman's classic framework. Then, I sought to explore if the conceptualization of charter school secession manifested in Indiana newspaper editorial pages. A total of 1,245 editorial items spanning 25 years in 40 newspapers were considered. The discourse analysis revealed a set of four reactionary types, with the dominant "battle" between "C Team" versus "T Team" approach fueling the "hot rhetoric" (Hayden 2012) among local actors. A secondary set of "battles" was identified in this discourse in which actors aired grievances against the TPSD and threatened to and/or pursued efforts to create districts. While I classified these movements as types of charter school and district school secessions, I also emphasize that actors did not readily classify their efforts as such in the data. In the first case, the central actor threatened to launch a charter to force district adoption of a particular curriculum. In the second case, the seceding group declined the proffer of charter school formation proposed by the state superintendent of public instruction. These cases illustrated how *threats* and efforts to secede matter and were met with political concessions in the data.

Significant Findings

Overall, this study considered the intersection of charter schools and secession in three ways: (1) conceptualization of charter school secession using Hirschman's framework as a foundation, (2) how the intersection of charter schools and secession manifested in Indiana newspaper editorial items, and (3) focused analysis of exposed

cases related to proposed charter schools and secession in the data. Ultimately, this study

found little evidence of secession as a sustained driver in Indiana's charter school

development history. Importantly, the conceptualization of charter school secession

developed in the first part of the study did not match with findings of the discourse

analysis. In the closest identified case, loyalty to the charter school mode and clear goal

of independence from the TPSD were not clearly established (see Figure 10). However,

crisis moments within communities reflecting actors' dissatisfaction with the TPSD and

associated efforts to withdraw and form a new district (one, a charter school, and one, a

new TPSD) were identified.

Figure 10: Results of Charter School Secession in Study

CONCEPTUALIZATION	CASE
Link between Charter School Formation + Secession	**Roger Parent and Proposed New Tech Charter School**
● **VOICE**: Crisis of legitimacy regarding local school model; may make explicit threat of charter school exit. ● **EXIT**: Charter school exit is considered the means of transferring independence away from district. Met with local and/or state resistance. ● **LOYALTY**: <u>charter school model</u>	● **VOICE**: TPSD failure to adopt specific curriculum; claim of charter school exit ● **EXIT**: met with community leaders and Ball State officials to begin formation process; resistance by newspaper editorial and local school boards ● **LOYALTY**: *public education* based on ability to adopt <u>curriculum</u>

Summary of Findings Related to Charter School Secession Constructs

The exploratory process of differentiating $Exit_2$ from $Exit_1$ and $Voice_2$ from

$Voice_1$ in the discourse was nuanced, particularly as evidence of secessionist impulses

was minimal in the data. Identifying the secession point hinged on first identifying the

groups' perceived "threat" or crisis point and then connecting whether the groups pursued

efforts to form a new district as remedy. Further, identifying an established allegiance to

charter schools as the institutional form of exit was not clearly connected to the identified

secession cases despite a dominant theme in the discourse of increasing acceptance of charter school development within Indiana. Below, I note key overall findings related to each construct of charter school secession.

Voice₂

- **Voice₁**: As noted, "hot rhetoric" (Hayden 2012) dominated the discourse in Indiana related to charter school development. When such rhetoric converged around particular charter school formation, it often coincided with larger structural issues (i.e., consolidation or school closures) in the community.

- **Claim:** Crises of legitimacy were noted around two particular events: (1) Roger Parent's effort to create a charter school to bypass the local school district's failure to adopt a desired technology plan. (2) In the district-level secession case of MCSA, the movement was a reaction to a statewide effort to consolidate TPSDs.

Exit₂

- **Exit₁**: The study illustrated wide consensus that the "incredible concentration of power and authority of management of local schools at the state level is unprecedented" (Coker 2011). Gov. Daniels, State Superintendent Bennett, and Indianapolis Mayor Ballard were prominent shepherds of the charter school reform. Data reflected a state emboldened by debates on codification, expansion, and retraction of charter school legislation. Perspectives noted and reacted to the steady removal of barriers affecting charter school implementation.

- **Independence:** This variable was identified in two different ways in the dataset. In the case of school district secession, the separation was intended into exit into a new TPSD. In the case of Parent's New Tech Charter, the goal of independence (as

developed in Chapter 2) was not clearly established as Parent continually sought district oversight and management of the curriculum.

$$Loyalty_{CharterSchools}$$

- **Loyalty$_{CharterSchools}$**: This construct appeared to influence whether actors related to the two secession cases pursued charter school exit to ameliorate their TPSD grievance. In both secession-related cases, this construct was not identified as strongly associated with the charter school form and appeared to be mediated by the "T Team" bargaining. Key political actors were identified as strongly loyal to the charter model.

- **Loyalty$_{District}$**: This "T Team" perspective presented with efforts to maintain the integrity of the community and TPSD system. It was often led by TPSD administrators and teachers, though editorial teams and letters to the editor also criticized community disruption caused by charter school developments.

Limitations to the Study

This study relied on actors' discourse and positions on charter schools, which is a policy arena fraught with ideology and polarization (Ertas 2015), to reveal crisis points with the TPSD. These crises points were then considered using the novel charter school secession constructs. Using newspaper editorial discourse helped situate these perspectives in light of community issues *limited to that discourse*. That is, other relevant information related to crisis events may not have been considered in the analysis. Further, this study was designed by applying a series of assumptions about secession—a still-undeveloped theory in non-nation-state contexts (Bishai 2004, Ker-Lindsey 2017)—to the case of charter schools. As noted, the conceptualization of charter school secession was not realized in the discourse analysis of Indiana's charter school development.

Reflecting on the Term "Secession"

As illustrated in Chapter 6, the term "secession" or similar constructions of "separatist" were made sparingly and only in reference to district secession. Notably, the term "secession" was not associated with Parent's threat to launch a charter in any of the data. On one hand, this suggests, given the two emergent cases identified in this study, the continued need for "deep, thick" analysis to understand the preconditions of secession, particularly in emerging education policy contexts. On the other hand, a question emerges as to whether "secession" is the most appropriate term to explore such conditions or whether the concept is stretched beyond recognition.

Models of secession vary considerably among scholars (Wood 1981: 108). I consistently applied the framework of charter school secession developed in Chapter 2 to consider whether actors' claims against the TPSD coincided with institutional exit via the charter school form. While the model and findings are not in alignment, the gaps may be fruitful for continued development of secession studies applied to the unique hybrid nature of charter schools that straddle both public and private spheres. Further, the study, from its offset, engaged a broad view of secession in which actors withdraw from one form to create another. Drawing from Hirschman's voice, exit, loyalty framework, the lens of secession used in this study illustrated how the three constructs intersected with secessionist impulses, creating friction points in local communities.

Role of Newspapers in Shaping Charter School Secession

This study considered the relationship between secession and charter schools through newspaper editorial discourse. The consistent editorial position was one of maintaining community stability, which may have influenced whether individuals or

groups disgruntled with the *status quo* perceived the newspaper as a reliable medium. In cases identified as strong TPSD holds, editorial staffs in cities such as the *Herald-Tribune* (Anderson, Ind.) and *Palladium-Item* (Richmond, Ind.) admonished chartering groups for trying to work at "cross purposes" of local district administration. In contrast, in the cases of Gary and Indianapolis, editorials welcomed charter schools as an economic catalyst to boost declining student enrollments. The *South Bend Tribune* editorial board initially tried to dismiss the charter school secession attempt outright but made an about-face when strong community support for the curriculum and limited district finances were identified. As I note below, future consideration of secession in charter school contexts using different media and methodological approaches may reveal additional insights and help refine the model.

Generalizing Results

The charter school secession framework developed here is considered *only* in the context of the data analyzed; drawing inferences beyond the data should be made cautiously. Focusing strictly on editorial voice may have eclipsed other actors, voices, and information affecting charter school secession, including additional attempts, from emerging in analysis. It is also possible that charter school secession exists only in the discourse. Nonetheless, this study demonstrated that secessions (of a particular sort) did manifest, suggesting future utility of the framework developed using Hirschman's foundational framework. While secession (Hale 2000) and charter school policies and development (Renzulli and Roscigno 2005) both have signaling and mimetic impacts to others, additional studies are needed to validate and refine the charter school secession framework developed here.

Future Directions

As is the nature of exploratory research, several new questions emerged in this dissertation process. In the following section, I identify key emergent questions and opportunities to refine the charter school secession framework developed in the study.

1. **How does the medium through which charter school secession is considered affect findings?**

This study explored very narrowly whether charter school secession was reflected in editorial page items from newspapers in one state. This approach allowed a number of actors across newspapers to share their views on charter schools to help expose crises points sparking charter school development. Future studies should consider how additional media, such as news articles, social media channels, and charter school propaganda, more directly offer greater context to such crises and evaluate whether charter school secession manifests differently in those discourses.

2. **Do other states reflect a history of charter school secession? If so, how does it compare to findings here?**

A systematic comparison of how secession manifests in other states' charter school development history would be especially helpful for exposing additional conditions and counterfactuals to findings here. Immediate comparative sites should include southern states of Tennessee and North Carolina which are increasingly sites in which popular media uses the term "secession" within public education reporting and notable sites of continued district-level secession (see EdBuild 2019). Such comparisons may help identify trends in charter school secession and may even expose if there are

signaling effects associated with charter school secession movements (i.e., other states are aware and informed by such prior movements).

3. Who drives charter school secession?

A key finding in this study was that a link between charter schools and secession could emerge in both demand- and state-supplied contexts. While neither case resulted the creation of a charter school, the tension between who drives secession is an interesting question for future research. However, distinguishing between demand- and supply-side strategies is nuanced. The State often deploys redistribution strategies aimed to reduce minority claims (Osaghae 1990: 84) and circumvent secession (Flamand 2019), as indicated through the "T Team" bargaining addressed in Chapter 6.

4. What role and to what degree do state policies regarding municipal and educational fragmentation affect charter school secession?

Though I noted how Indiana code related to district session was exposed in the data as part of a seceding group's bargaining efforts, the study did not consider the weight of such policy on a secession calculus. Tennessee may be a strong candidate for a comparative study with its history of district secession (Rushing 2017, Siegel-Hawley et al. 2018, Taylor et al. 2019) and its differing geographic, historical, and cultural impacts on public education.[57] Exploring if the state reflects charter school secession would be a first step in developing a comparative study between Indiana and Tennessee regarding both charter and district secessions.

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[57] For example, see Meyer et al. 1979 on how historic geographic differences impact education.

5. **Do group members trying to create charter schools describe or recognize their efforts as secession?**

North Carolina is a practical and ongoing site ideally suited for studies of charter school secession using survey and interview-response methods. Cline (2018) detailed how groups of parents in "four wealthy suburbs of Charlotte that are dissatisfied with the administration of the larger school system" have considered the idea of using municipalities to fund their own charter schools, a move opponents say is akin to district-level secession. Pursuing new institutional forms such as a *municipality* to authorize the charter school harkens to the "New T/Non-C Team" approach identified in this study. Interviewing actors about whether they view their actions as secession or identify secession-like preconditions affecting their efforts would add another dimension to whether the term "secession" is an appropriate description of these efforts.

6. **What does the decision calculus to pursue one form of educational secession (e.g., district-level versus charter school secession) look like?**

While an accounting of educational secession is well beyond the scope of this dissertation, a few thoughts on the intersection of charter school secession and district-level secession are warranted since versions of both manifested in the data. In particular, the decision calculus to pursue one form over the other may be of interest to educational policymakers and key stakeholders, especially those interested in preventing secessions from occurring in the first place.

Kentucky, of which I am a resident and whose legislature approved charter schools during the course of writing this dissertation, may be a prime site for interview studies of actors interested in pursuing charter formation and their perspectives regarding

forms of and pursuit of exit, including secession. The state does not have a charter school funding mechanism—a legislative tactic that effectively results in "shelving the law…again" (McLaren 2019), nor has it implemented a charter school. Jefferson County Public Schools received two notices of *intent* to file applications (to open in the 2019-2020 academic year) but did not receive applications ("Charter School Archives" 2019). The district's webpage prominently notes that there is no charter school funding mechanism ("Charter Schools" 2020). More recently, the Kentucky Department of Education unanimously denied an appeal from the proposed River Cities Academy, which was the first application filed in the state aimed to open a charter school. The local school board, the Newport Independent School District, denied the application, which was sent to the KDOE on appeal. In the rejection, KDOE stated that the group "wrongly relied on public funding in its 5-year budget projections" (Spears 2020).

Another fruitful endeavor may be to identify cases of district-level and charter school secession in each state and develop a national educational secession index. EdBuild (2019) identified 128 district-level "secession counts" in 26 states since 2000, including two district-level secession attempts in Indiana, one of which was captured in this study as the MCSA case. The other falls beyond the scope of the study's timeframe and is considered ongoing according to EdBuild (2019). Residents of Silver Creek schools were/are attempting to secede from West Clark Community Schools (Clark County) based on "deplorable school conditions and dysfunctional community relationships" (Goforth 2019) with more rural areas in the district. This appears to be a longstanding issue, with media pointing to deep community divisions stemming from differences in educational objectives (Fittes 2019) and state-mandated consolidation in

the 1960s (Goforth 2019). The state board of education approved the separation plan in a 10-1 vote last fall, with final approval heading to West Clark residents likely in May 2020 (Fittes 2019).

An inquiry to group members about whether they considered or pursued alternative forms of exit (i.e., charter school secession or municipal creation to establish a new school district) would be a worthwhile area for future research. Additionally, as the group is active, survey and focused interviews may help triangulate constructs of secession considered in this study (see Schutt 2012).

Concluding Thoughts

This study began with a broad and ambitious scope: to better understand and conceptualize the relationship between charter schools and secession using Hirschman's classic voice-exit-loyalty framework as a point of departure. This process presented a new method by which to consider whether the charter school debate at the local level reveals a *secondary* debate in which actors leverage charter school formation as a reactionary measure against the TPSD for the goal of independence. Discourse analysis of editorial pages revealed a range of actors, perspectives, and outcomes in Indiana regarding the intersection of charter schools and secession. Two emergent cases related to secession were identified and discussed, though neither fully reflected the initial conceptualization of charter school secession. Importantly, these findings are limited to the data at hand. However, if the term "secession" continues to be referenced in media and secession (or secession-like) movements are actively occurring in communities, greater conceptual, empirical, and shared understanding is needed. The study presented here has proposed and leveraged a potential framework to this end.

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APPENDIX A: INDIANA CHARTER SCHOOLS, DISTRICTS, AND RELEVANT

POLITICAL ACTORS IN STUDY

Figure A.1: Indiana Charter School Map, 2020
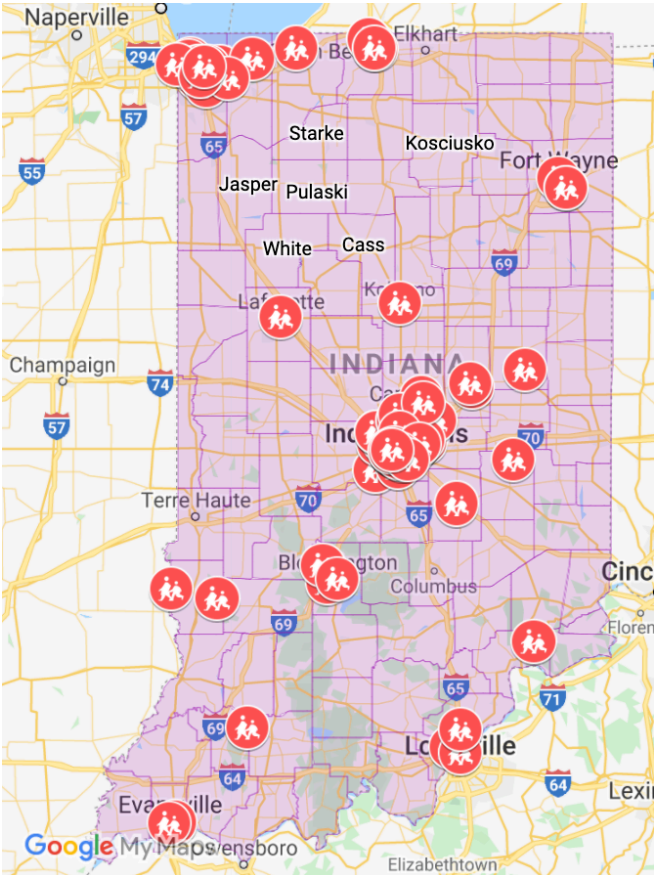
Source: Indiana Department of Education 2020

Figure A.2: School Districts in Indiana (as of 2015)

Note: The text "School Corporation" has been removed from the labels where it occurred.
Source: Indiana Business Research Center, using 2015 boundaries from the Indiana Department of Education and the U.S. Census Bureau's TIGER/Line files. February 2016.

Source: StatsIndiana 2015

Figure A.3: General Comparison, Charter Schools versus District Schools

	Traditional Public Schools	Charter Schools
Creation & Governance	• States create/approve districts that function as individual entities. • Up to district discretion to create and run number of schools. • Board of elected officials governs district; board appoints superintendent to oversee daily district operations. • State can intervene (process varies) if district is considered "failing."	• Autonomous legal entity. • Public school that must adhere to charter terms set for finite period. Governed by own board of trustees. • Can be managed by community or parent group, independent nonprofit, or for-profit management organization. • Authorizer has the power to close if school violates charter, fails to meet standards, or becomes financially insolvent.
Funding	• Bulk of funding is local and state tax revenue. • Receive per-pupil operating funds. • Can issue bonds for major capital expenditures. • Supplement with foundation fundraising.	• Like traditional districts, receive per-pupil operating funds from state and federal revenue. • Not authorized to levy local taxes. • State support for capital outlay vary. • Rely on grants, awards, and donations.
Curriculum	• Accredited by state board of education. • Districts must adhere to state academic standards, curricular, and text requirements. • Often offer a high number of elective courses and programs.	• Accredited by authorizer. • Follow state standards with flexibility (e.g., curriculum and schedule). Often implement alternative teaching approaches. • Tend to offer fewer elective courses in comparison.
Admission & Cost	• Free. May charge modest fees. • States and/or school boards determine districting assignments and ability to choose or transfer schools.	• Free. May charge modest fees. • Open enrollment and application process. • May set some preferences for students (e.g., sibling); use lottery if oversubscribed.
Size	• Comparatively larger population with more extracurriculars.	• Comparatively smaller with fewer extracurriculars.
Qualifications of Teachers	• Must meet all state certification requirements. • Secondary school teachers are typically expected to be "highly proficient" in subject areas.	• Credential requirements vary by state. • According to Indiana Code 20-24-6-5, at least 90% of full-time teachers must hold a license to teach (or be in the process of obtaining one) within 3 years of teaching at a charter school.

Sources: Buckley & Schneider 2005, "A Divided Mind: Charter Schools vs. Public Schools" 2009 (modified), "Charter Schools FAQs" 2019, Education Commission of the States 2020

Figure A.4: List of State Superintendents of Public Instruction, Indiana Governors, and Indianapolis Mayors during Study Timeframe, 1990 to 2014

	Name	Took Office	Left Office	Party Affiliation
State Superintendent of Public Instruction	H. Dean Evans	June 6, 1985	January 11, 1993	Republican
	Suellen Reed	January 11, 1993	January 12, 2009	Republican
	Tony Bennett	January 12, 2009	January 19, 2013	Republican
	Glenda Ritz	January 19, 2013	January 9, 2017	Democrat
	Name	**Took Office**	**Left Office**	**Party Affiliation**
Indiana Governor	Evan Bayh	January 9, 1989	January 13, 1997	Democrat
	Frank O'Bannon	January 13, 1997	September 13, 2003	Democrat
	Joe E. Kernan	September 13, 2003	January 10, 2005	Democrat
	Mitch Daniels	January 10, 2005	January 14, 2013	Republican
	Mike Pence	January 14, 2013	January 9, 2017	Republican
	Name	**Took Office**	**Left Office**	**Party Affiliation**
Indianapolis Mayor (Unigov)	Stephen Goldsmith	January 1, 1992	January 1, 2000	Republican
	Bart Peterson	January 1, 2000	January 1, 2008	Democrat
	Greg Ballard	January 1, 2008	January 1, 2016	Republican

APPENDIX B: NEWSPAPERS IN DISCOURSE ANALYSIS

Figure B.1: Locations of Newspapers in Analysis
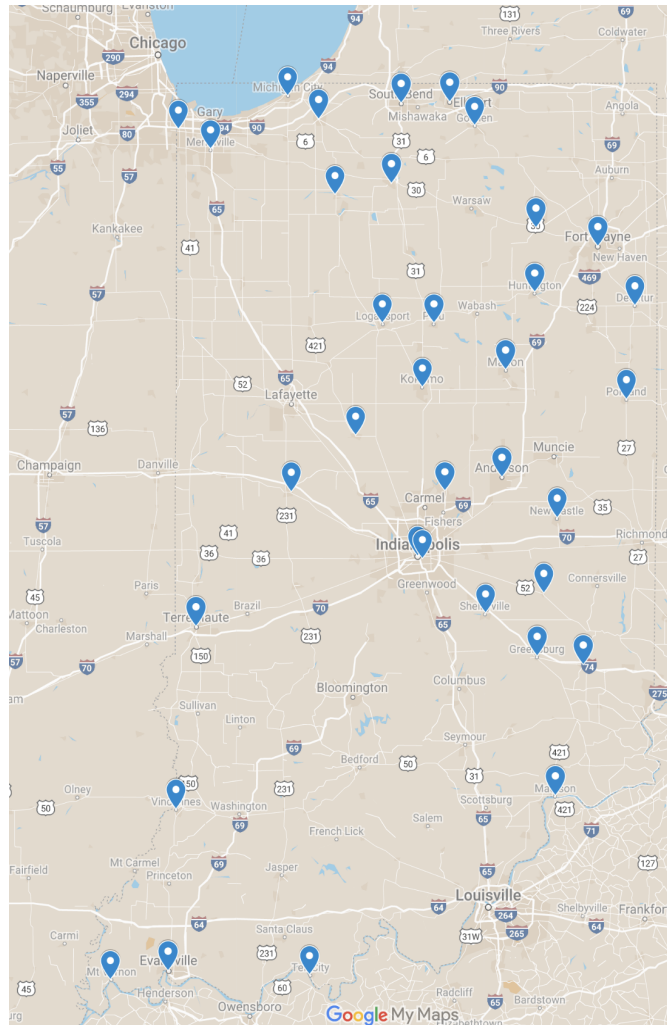
Source: Author

Figure B.2: Newspapers by Number of Articles Considered in Final Analysis

Title	City	Owner during Study Timeframe	Dates in Database	Database	Articles Considered
Indianapolis Star	Indianapolis	Central Newspapers, Inc., Gannett Company (as of 2000)	1991- present	US Newsstream	211
Times of Northwest Indiana	Munster	Lee Enterprises (as of 2002)	1990-present	Access World News	148
Recorder	Indianapolis	Recorder Media Group	1991-present	Ethnic NewsWatch	147
Evansville Courier & Press	Evansville	Journal Media Group	1991-present	Access World News	111
South Bend Tribune	South Bend	GateHouse Media	1998-2012	US Newsstream	96
Post-Tribune	Merrillville	Tribune Publishing	1986-present	Access World News	85
Herald Bulletin	Anderson	CNHI, LLC	2007-present	Access World News	73
Journal Gazette	Fort Wayne	Journal Gazette Co.	1992-present	Access World News	53
Courier-Times	New Castle	Paxton Media Group	2008-present	Access World News	28
Chronicle-Tribune	Marion	Gannett Foundation, Paxton Media Group (as of 2007)	1999-present	Access World News	27
Madison Courier	Madison	Locally owned	1997-present	Access World News	27
Kokomo Tribune	Kokomo	CNHI, LLC	2008-present	Access World News	25
Palladium-Item	Richmond	Gannett Company	1999-present	US Newsstream	23
News-Dispatch	Michigan City	Paxton Media Group	1997-present	Access World News	20
Herald Times	Bloomington	GateHouse Media	2010-2013	US Newsstream	16
Journal & Courier	Lafayette	Gannett Company	2002-present	US Newsstream	16
Paper of Montgomery County	Crawfordsville	Locally owned	2004-present	Access World News	16
Huntington Herald-Press	Huntington	Quayle Family, Paxton Media Group (as of 2007)	2000-present	Access World News	15
Decatur Daily Democrat	Decatur	Decatur Publishing	2008-present	Access World News	13
Star Press	Muncie	Gannett Company	2000-present	US Newsstream	13

Elkhart Truth	Elkhart	Federated Media, Paxton Media Group	2007-present	Access World News	11
Pilot-News	Plymouth	Horizon Publications	2008-present	Access World News	10
Post & Mail	Columbia City		2008-present	Access World News	8
Tribune-Star	Terre Haute	CNHI, LLC	2008-present	Access World News	8
Leader	Knox	Stark County Newspapers	2008-present	Access World News	6
Pharos-Tribune	Logansport	CNHI, LLC	2007-present	Access World News	6
Shelbyville News	Shelbyville	Paxton Media Group	2009-present	Access World News	6
Times	Frankfort	Paxton Media Group	2009-present	Access World News	5
Goshen News	Goshen	CNHI, LLC	2007-present	Access World News	4
Peru Tribune	Peru	Paxton Media Group	2003-present	Access World News	4
Batesville Herald-Tribune	Batesville	CNHI, LLC	2008-present	Access World News	2
Commercial Review	Portland	The Graphic Printing Co. Inc.	2003-present	Access World News	2
Rushville Republican	Rushville	CNHI, LLC	2008-present	Access World News	2
Vincennes Sun-Commercial	Vincennes	Paxton Media Group	2002-present	Access World News	2
Bourbon News-Mirror	Plymouth		2008-2018	Access World News	1
Greensburg Daily News	Greensburg	CNHI, LLC	2008-present	Access World News	1
La Porte County Herald-Argus	La Porte	Small Newspaper Group, Paxton Media Group (as of 2007)	2000-present	Access World News	1
Mt. Vernon Democrat	Mt. Vernon	Landmark Community Newspapers Inc.	2008-present	Access World News	1
Perry County News	Tell City	Landmark Community Newspapers Inc.	2008-present	Access World News	1
Times	Noblesville	Sagamore News Media	2008-present	Access World News	1
40 titles	**38 cities**				**1,245**

Figure B.3: Major Indiana Newspapers (by Circulation) Included in Database Searches

Title	City	Circulation	Dates	Database
Indianapolis Star	Indianapolis	134,113	1991- present	**US Newsstream**
Times	Munster	85,806	1990- present	**Access World News**
South Bend Tribune	South Bend	51,195	1998- 2012	**US Newsstream**
The Journal Gazette	Fort Wayne	48,557	**1992- present**, 2001-present	**Access World News**, US Newsstream
Evansville Courier & Press	Evansville	47,725	**1991- present**, 1993-1998	**Access World News**, US Newsstream
Post-Tribune	Merrillville	26,850	**1986- present**, 2000-2008	**Access World News**, US Newsstream
Star Press	Muncie	21,936	2000-present	**US Newsstream**
Herald-Times	Bloomington	20,415	**1988- present**, 2010-2013	**Access World News**, US Newsstream
Kokomo Tribune	Kokomo	19,925	2008- present	**Access World News**
Herald Bulletin	Anderson	19,809	2007- present	**Access World News**

Note: Bold indicates the database used for final discourse analysis.

APPENDIX C: CODED TOPICS

Figure C.1: List of Voice, Exit, Loyalty Factors Identified in Discourse Analysis

Coded Topics	Formation Sub-Themes	Secession Factors
• Innovative Curriculum/Design • Teacher Licensure/Certification	Innovation	$Voice_2$
• Local Control/Choice of Education • Parental Determinism • Vouchers	Autonomy	
• School Size • Operator/School Management	Efficiency	
• Developed to Protect Property • Developed to Exclude based on Race	Zoning	
• Attract and Retain Residents • Shore Up Old Buildings	Economic Development	
• Pupil Enrollment by Race or Ability • Per-Pupil Funding • School Performance/Outcome • Facilities and Student Transportation	Equity/Resource Parity between Charter Schools and Traditional Schools	
• Failure of TPSD to provide service • Failure of TPSD to preserve community	Claim	
• Legislation regarding Charter School Codification, Expansion, and Retraction • Charter School Applications • School Type Conversions	Formal	$Exit_2$
• Authorizer "Shopping" • Political Leadership • Isomorphism	Informal	
• Charter School Formation • New District Formation	Form of Independence	
• Allegiance to Charter or District Model	Ideology/Principle-Based	Loyalty
• Allegiance to School, Community	Place-Based	

N = 1,245 newspaper editorial items

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2020   **PhD, Urban and Public Affairs**, University of Louisville, Louisville, KY
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2007   **BA, Political Science and Communication**, *magna cum laude*, University of
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TEACHING EXPERIENCE
University of Louisville's McConnell Center, Louisville, Kentucky
2019-2020   Political & Educational Philosophy of Wendell Berry, Politics of George Orwell
2017-2019   Summer Young Leaders Academy, "Federalist and Anti-Federalist Debates"
2016, 2018   Strategic Broadening Seminar for the U.S. Army, "Leadership Lessons in *The
             Prince*" (2016 top-ranked instructor)
Miami University Political Science Department, Oxford, Ohio
2008-2009   Teaching Assistant: Global Politics POL 102, Modern Governments POL 221
Fulbright Grantee, South Korea
2007-2008   English Teaching Assistant, Hallim Girls' Middle School, Jeju-do, South Korea

CONFERENCE & WORKSHOP PRESENTATIONS
2019, 2020   Graduate Student Regional Research Conference, University of Louisville
2020   Graduate Network of Arts and Sciences Symposium, University of Louisville
2014, 2019   Annual Meeting of the Kentucky Political Science Association
2009   Annual Meeting of the Northeast Political Science Association
2009   Political Science Graduate Research Series, Miami University

GUEST SPEAKER
2019   **Invited Lecturer, "Foundations of the American Political System**." Center for
           Civic Education's Congressional Academy, Goucher College, Baltimore, MD:
           July 6-9.
2017   **Panelist, "Kentucky's Civic Health**," Western Kentucky University's Institute
           for Citizenship & Social Responsibility, Bowling Green, KY: February 1.
           Moderator, "Kentucky's Civic Health," McConnell Center, University of
           Louisville, Louisville, KY: January 26.

ACADEMIC AFFILIATIONS
- Urban Affairs Association, Graduate Student Member, 2020-present
- American Educational Research Association, Graduate Student Member, 2019-present
  Special Interest Group: Charters and School Choice
- American Association of University Women, Member, 2019-present

PROFESSIONAL EXPERIENCE

University of Louisville's McConnell Center, Louisville, KY, 2010-present

Journalism (part-time)

2010-2012	Special Correspondent, Oldham Era, Landmark Community Newspapers, Inc., La Grange, KY
2004-2007	Managing Editor, 2006-2007; Sports Editor, 2004-2006; Louisville Cardinal, Louisville, KY
2001-2006	Reporter, News-Herald, Landmark Community Newspapers, Inc., Owenton, KY

PROFESSIONAL PROGRAM EVALUATION & PROJECT MANAGEMENT

- **Editorial Manager**, *Reflection and Choice: Federalists, Anti-Federalists, and the Debate that Shaped America*. McConnell Center Books, forthcoming.
- **Peer Evaluator, U.S. Department of Education**, American History and Civics National Activities Grants Competition, August 2016, August 2017.
- **Program Evaluator, McConnell Center's Strategic Broadening Seminar for the U.S. Army,** 2014-2016. Evaluated 30-day leadership development course to ensure program effectiveness; oversaw data analysis, authored After Action Report to the Pentagon, and recommended changes to enhance program performance.
- **Project Director**, February 2012. "Consequential Elections: Presidential Elections that Shaped America." Lead faculty: Randall Adkins, PhD, University of Nebraska Omaha, and Gary L. Gregg, PhD, University of Louisville.
- **Data Analyst**, "Citizen Satisfaction Survey: Developing and Implementing a Survey Instrument, Data Analysis, and Final Report for Madison Township (Ohio)," Center for Public Management and Regional Affairs at Miami University; Oxford, OH: May 2009.
- **Data Support**, "Creating a Position Classification Plan for Carlisle (Ohio)," Center for Public Management and Regional Affairs at Miami University; Oxford, OH: May 2009.

PROFESSIONAL SERVICE

- *National Judge*, We the People National Invitational Civic Education Program, Center for Civic Education; Leesburg, VA: 2017, 2019, 2020
- *State Judge*, Kentucky's We the People State Competition, Center for Civic Education, University of Louisville; Louisville, KY: 2014-present
- Interviewer, University of Louisville National and International Scholarship Office; Louisville, KY: 2014-present