

# TEACHERS IN PROFESSIONAL PRACTICE:

**An inventory of new  
opportunities for teachers  
working collectively as  
professionals**

*The latest in a series of reports on the  
changing face of public education*

**January 2005**



*A joint venture of the Center for  
Policy Studies and Hamline University*

## ABOUT EDUCATION|EVOLVING

Millions of America's students head off to school each morning sporting brightly colored backpacks and determined to make this their "best school year yet." At the same time, federal and state policymakers are making tough new demands that our schools change and improve – so that "All students learn at high levels." New standards, tests, timelines and consequences are all being put in place to make sure that "No child is left behind."

Yet, all across the country, many policymakers, journalists, teachers, parents and students themselves are troubled by a haunting feeling that all this effort may not really produce the degree of change and improvement that we need. At a minimum, we are now taking a series of risks that are neither wise nor necessary to be making with other people's children. These are, after all, demands and results well-beyond what we've ever expected of American public education – all at a time of severe budgetary pressures on states, districts and individual public schools.

That, at least is the serious concern of a small group of Minnesota-based public policy veterans who have come together as Education|Evolving... a joint venture of the Center for Policy Studies and Hamline University. The individuals behind this initiative believe...

... it's an unwise and unnecessary risk for the state and nation to be trying to get the results we need solely by changing the schools we now have...

... the issues about teachers and teaching should not be debated only in the old employer/worker framework...

... the solution to maintaining financially viable public education in rural areas may not lie in the three old 'solutions' of excess levies, consolidation and state aid...

... today's schools should not go on largely failing to take advantage of new electronic technologies and other substantially different ways of teaching and learning...

... and the critical discussion about the future of K-12 education in Minnesota and nationally must not proceed solely as a discussion among adults, with students largely left on the outside looking in.

Education|Evolving is undertaking a number of initiatives during the current year. They include a national initiative to convince policy makers, education reform leaders, journalists and others that *creating new schools* should be an essential element in achieving needed changes and improvements in teaching and learning – at least equal in importance to *changing the schools we now have*.

One focus of this initiative is to introduce the concept of an "Open Sector" – to help create the kind of legal and political environments in which new schools can be created and succeed. Another – explored in this report -- is designed to challenge the fundamental premise that teachers in schools must always be "employees." Another initiative is looking at the premises used in asking the critical question, "How are chartered schools doing?" Other ongoing Education|Evolving projects focus on strengthening and enhancing the role of the agencies and organizations that sponsor chartered schools – and on how policymakers, journalists and others can more routinely and substantively tap into the experiences and perspectives of students and of young people not now attending school.

Education|Evolving's leadership is provided by two Minnesota public policy veterans: **Ted Kolderie**, senior associate at the Center for Policy Studies, and **Joe Graba**, a senior policy fellow at Hamline University. Its coordinator is **Jon Schroeder**, former director of Charter Friends National Network. Education|Evolving's activities are regularly updated on the initiative's unique and continually refreshed web site [www.educationevolving.org](http://www.educationevolving.org). To receive print and electronic updates of Education|Evolving initiatives, contact [info@educationevolving.org](mailto:info@educationevolving.org).

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# Teachers in Professional Practice

## An inventory of new opportunities for teachers

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The latest in a series of reports on the changing face of public education

JANUARY 2005

### NEW MODELS HAVE IMPLICATIONS FOR DISTRICT REFORM EFFORTS

Readers who've been interested in the idea of teacher professional partnerships will be interested in this new report specifically describing the partnership and co-operatives appearing now in Minnesota and in Milwaukee and—in budding form—elsewhere in the country.

It is a small beginning, at this stage. But the significance of an innovation is not best measured by the size at which it first appears. Or by the auspices under which it first appears.

Opening a way for teachers to work in public education as professionals in collegial groups is a significant innovation.

It does depart—dramatically—from the prevailing notion that better teaching, and the student motivation that results, can be achieved within the traditional framework; within the historic understanding that if you want to be a teacher you have to be an employee. Most of the effort currently in this country is to improve teaching, and teachers, through large programs of 'professional development' organized by the administrators for whom teachers work.

But it is clearly conceivable for teachers like other professionals to work with partners in groups they collectively own; serving a client in an arrangement that gives them both the autonomy we associate with professionalism and the accountability we expect from

professionals. The potential implications for public education was explained in Teachers As Owners, a book put together in 2003 by Edward J. Dirkswager for Education/Evolving and published by Scarecrow Press.

The potential was underscored by the finding from Public Agenda's survey of teachers in 2003. The question to a national sample of teachers was: "How interested would you be in working in a charter school run and managed by teachers?"

The question asked respondents to affirm an interest in coming into the charter sector in order to express their interest in teacher professional practice. Still, the interest is startling to most people: 58% of teachers said they would be somewhat or very interested; 65% of the under-five-year teachers and 50% of the over-20-year teachers.

Research has been slow to pick up on this innovation. Research, as John Witte of the University of Wisconsin has pointed out, tends to generalize; is interested in 'most' and 'on the whole' and 'overall'. It pays less attention to individual, particular developments that turn out to be the really significant innovations.

From what we do know, where teachers are working in these collegial groups, it seems clear that attitudes and behaviors differ remarkably from those we see in conventional school settings; and that student attitudes and

behaviors differ correspondingly. (For a sense of this, see the remarks by the lead teachers in two such partnerships, made to audiences in Washington in November 2003: "Teacher Professional Partnerships: A Different Way to Help Teachers and Teaching", Education/Evolving, January 2004.)

Better teacher and student attitudes and behaviors are not in and of themselves 'better learning'. But if you are looking to grow bananas it makes basic sense to plant where there is fertile soil and a lot of rain. 'Conditions' matter.

In a number of major cities the leadership responsible for K-12 education—often, now, the mayor—is interested in starting schools new; high schools, especially. In starting new, outside the old organizational framework, it is possible to try new and different arrangements. So, not surprisingly, leadership in New York City, Chicago and elsewhere has been interested in the idea of teacher partnerships; in which the teacher-group gets the authority to organize and run the school and accepts responsibility for fiscal and student performance.

In these and other efforts to set up the teacher partnership/cooperative arrangement this report, prepared by Kim Farris-Berg, will be helpful. It is clear, for one thing, that the model will change, will be adapted, as it moves from one organizational and political setting to another. This has happened as the initial model, at EdVisions Cooperative, moved from Minnesota to Milwaukee. Almost certainly it will happen again.

Variations in the organizational form will be helpful. They will not affect the central idea—which is to give an organizational reality to the impulse everywhere to get teachers to feel and to work collegially and collaboratively . . . moving from the old culture of 'my classroom' to the new collegial culture of 'my school'.

As always, Education/Evolving would be interested in comments you may have about the idea, or about the organizational forms described in this report. And, in knowing about any similar efforts being made, of which we may not yet be aware.

**Ted Kolderie**

## AN INVENTORY OF TEACHER PROFESSIONAL PRACTICE ARRANGEMENTS

### Operational Teacher Professional Partnerships Serving Public Schools

As of August 2004 there were seven operational teacher professional partnerships (TPPs) serving 14 chartered schools, all in Minnesota and Milwaukee, Wisconsin, and all established as cooperatives of teachers. In Minnesota, EdVisions Cooperative contracts with nine chartered school boards, throughout the state, to deliver educational services.

In Wisconsin, six independent teacher cooperatives contract with six respective instrumentality charter schools of Milwaukee Public Schools. They are: ALAS Cooperative, ALBA Cooperative, Community High School Cooperative, I.D.E.A.L. Charter School Cooperative, Phoenix High School Cooperative, and Professional Learning Institute (P.L.I.) Cooperative. The schools share the cooperatives' names, but the school and the cooperative are separate entities in each case. More information on the operational TPPs' structure, management, and services is outlined in the following profiles.

## Minnesota

### EdVisions Cooperative

**Legal Structure:** Cooperative under Minnesota Statute, Chapter 308A. Also a 501(c)(3) called EdVisions, Inc. That is, a nontaxable nonprofit organization.

**Governing Board:** An 18-member board governs EdVisions Cooperative (EdVisions). The board is made up of two teachers from each of the nine sites EdVisions serves. Every other year, the site management team from each site elects two board members to serve two-year terms.

**Sites Served:** EdVisions contracts with eight chartered school boards to deliver educational services. Avalon Charter School. El Colegio Charter School. Lafayette Charter School. Minnesota New Country School. Nerstrand Elementary School. RiverBend Academy. River Heights Charter School. SAGE Academy.

**TPP mission, vision, values:** EdVisions' mission is to:

- Increase learning opportunities for pupils.
- Encourage the use of different innovative teaching methods.
- Establish new forms of accountability for schools.
- Develop and conduct appropriate career development programs for teachers.
- Create new professional opportunities for teachers including the opportunity to be responsible for the learning program of a school.

EdVisions' founders created the cooperative to address the need for new roles for public educators. EdVisions challenges the existing frameworks of traditional educational thinking. It is made up of teachers and other educational professionals who believe teachers should assume new professional roles and create opportunities for direct involvement in owning and operating various educational entities.

EdVisions believes that the cooperative model allows entrepreneurial educators to create responsive,

innovative, and efficient educational programs in their own communities. EdVisions Cooperative is dedicated to professional practice and educator development.

**Membership structure:** EdVisions Cooperative established three levels of membership in 2004—associate members, shareholders, and affiliate members. As of August 2004, there were 140 “associate members.” Associate members are persons employed by the cooperative to teach and work as part of the “site management team” at one of the nine sites. Site management teams identify and recom-

### EdVisions Cooperative

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**TPP ESTABLISHED:** 1994  
**# OF SITES SERVED:** 9 (described below)  
**# OF ASSOCIATE MEMBERS:** Approximately 140.

mend new colleagues and are responsible for the learning program and administration of their independent sites. They pay an annual fee-for-service to EdVisions (see “Sources of revenue,” below), at which point all teacher-employees at the site are approved by the cooperative and enrolled as associate members for the year.

To the students and families at the school, associate members are known as teacher-advisors. The site teams do not use a tenure system. Each associate member is contracted to a one-year, at-will contract. And the associate members do not have a vote on EdVisions Cooperative matters.

“Shareholders,” also known as “voting members,” do vote on EdVisions Cooperative matters. One must apply for membership, and the EdVisions Cooperative board votes on the application. If approved, the applicant must purchase

a share for \$100 to become a shareholder. As of August 2004, there were 22 shareholders.

Some shareholders are also associate members. As of August 2004, there were approximately 15 people who were both. Only those who are both are eligible to receive patronage dividends. EdVisions expects the number of shareholder/associate members to increase, as the new membership structure went into effect near the end of the 2003-2004 school year.

Associate members have not had much of an opportunity to sign on as shareholders in order to access dividends and cooperative ownership (including voting rights). EdVisions leadership plans to encourage associate members to sign on.

In 2004, patronage refunds were given to the 15 shareholders/associate members, but the prevailing wisdom has been to spend down the excess prior to the end of the year by using the funds for a fall conference of all EdVisions members, for scholarships awarded to members for obtaining advanced degrees, and for other purposes similar to these.

Another membership category, "affiliates," is still being refined. As of August 2004, there were three or four affiliate members. This category is for schools, organizations, and individuals who want to belong to EdVisions Cooperative because they are interested in the group's activities. Potential affiliates apply for membership and the EdVisions Cooperative Board votes on the application. It's likely that affiliates will be assessed some sort of fee-for-membership, but EdVisions has yet to make this decision.

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Site teams are responsible for making site-related decisions<sup>1</sup>, including curriculum and budgeting decisions, but must ultimately take their decisions to the EdVisions Cooperative Board for review and approval. The review and approval process allows the Board to pose questions and/or

<sup>1</sup> Site team members are responsible for making site-related decisions irrespective of whether they are shareholders and/or associates.

ask for clarification about site team decisions, but does not give board members any role in the negotiation of particulars. Site teams are *not* responsible for personnel decisions (mainly, employment decisions). Personnel decisions are made at the EdVisions Cooperative Board level.

Each site creates and operates its own process for determining candidates for recommendation. The EdVisions Cooperative Board then approves the membership when it approves the mandatory fee-for-service contract with the site (see "Sources of revenue," below).

Any member may terminate his or her membership by petitioning the EdVisions Cooperative Board. When a site management team recommends dismissal of one of its associate members, EdVisions Cooperative makes the final decision. If the associate member is dismissed, s/he is removed from the rolls unless s/he petitions to become a shareholder or affiliate member.

**Performance measurement and improvement:** EdVisions Cooperative supplies general ideas for staff development (such as creating a brain-compatible learning environment, a democratic learning community, sound management and financial management practices, and professional growth opportunities) and for teacher-advisor roles and responsibilities, but each site team is responsible for creating its own criteria and processes. EdVisions expects each site team to create a professional development plan for each member as well as a strategic plan for its school.

**Compensation:** Members of each site team collectively determine the salaries and benefits of their fellow team members. Members consider staff development plans, survey data from parents and students, and performance toward graduation standards when determining the compensation or retention of each member.

**Start-up funding:** Teachers formed EdVisions Cooperative in 1994 without any outside source of funding. EdVisions has not depended on any funding other than fee-

for-service revenues from site teams (see “Sources of revenue,” below).

**Sources of revenue:** The ongoing source of revenue for each site team is the contract EdVisions Cooperative has with the chartered school it is contracted to serve (EdVisions has nine such contracts in all). EdVisions contracts with each chartered school to provide a given set of services for a given fee. The site team negotiates the contract, but each chartered school pays EdVisions directly for those services.

EdVisions then passes the money to the site team delivering services to that chartered school. Since the site team has control over its own budget, site team members work within the limits of that fee to collectively negotiate their own salaries and benefits.

EdVisions Cooperative earns revenue by charging a fee-for-service to the site teams, typically a percentage of the amount that the respective site team allocated to salaries and benefits. The EdVisions Cooperative Board determines the actual percentage, which in August 2004 was two percent. The money pays for EdVisions to manage payroll and benefits services. As each site grows, so does the fee paid to EdVisions.

**Determining fees to charge the schools served (for teaching, administration):** The site team for each school site negotiates the lump-sum fee when it negotiates the contract with the school.

**Financial management:** EdVisions Cooperative has an Executive Officer who completes all the paperwork necessary for payroll and benefits management, including tax, retirement, and other obligations. Site members supply the manager with the data necessary. A CPA hired by EdVisions, Inc., the nonprofit arm of the Cooperative, oversees the documentation and is the Treasurer of the Cooperative Board. A financial review is carried out each year to review the Cooperative’s books.

**Liability and business insurance:** Local providers competitively bid to provide liability and other types of insurance. The Executive Officer enlists the bids, and the

EdVisions Cooperative Board votes on which provision to accept.

**Administration:** Each site team is responsible for carrying out the specific contract EdVisions has entered into with their site’s (chartered school’s) board. The site team is responsible and accountable to EdVisions Cooperative for all leading and decision-making at its site, including determination of teacher salaries and benefits and keeping the learning/instructional programs updated and viable. The cooperative membership maintains a rigorous staff development program to keep all members up-to-speed with administrative knowledge.

Having ownership of the learning programs at the various sites requires that EdVisions Cooperative members do the following: (1) take the necessary steps to be financially accountable; (2) take care that students and parents are served according to their needs; and (3) evaluate and assess site programs with proper processes and report results to the sponsors, state, and community.

EdVisions Cooperative charges a fee-for-service (see “Sources of revenue,” above) to each of its member sites. In exchange, EdVisions provides payroll and benefits administration, staff development services, and help with evaluation and assessment of programs.

**Learning program:** EdVisions Cooperative sites use a student-centered model for project-based learning. According to EdVisions leadership, a high-level of direct parent involvement in the students’ learning, positive relationships between students and their teacher-advisors, and the sense of nurturing and community are all critical elements in the Cooperative’s success. Students get unbridled attention and activity. Parents get constant feedback. And teachers get a sense of professionalism that they believe was too often missing in traditional public education.

Learning is student-directed. There are no courses, no bells, and no teachers delivering lessons. Computers are available for student research, data storage, and creative

design. There are numerous opportunities to learn in and from the community.

Instead of taking traditional courses, students complete ten standards/performance-based projects each year. The teacher-advisors counsel and guide the projects to help all students master a specific standard as they develop and complete projects. Basic skills are acquired with one-on-one assistance, when necessary, and in small groups when more effective and efficient. All groupings are flexible and outcome-driven, not time-driven. Seniors are required to present a major research project involving community experts. Most students complete some post-secondary work.

### **EdVisions Cooperative plans for sites to form independent teacher cooperatives**

In Summer 2004, EdVisions Cooperative completed a strategic planning process. The outcome is a plan to encourage each of the nine EdVisions Cooperative sites to form their own, independent, cooperatives. EdVisions Cooperative will then be a “service cooperative”—a cooperative serving cooperatives. The independent cooperatives will contract with EdVisions Cooperative for services to include payroll, benefits, professional development, and more. EdVisions Cooperative will also be an Educational Development Organization developing small, progressive learning communities nationwide.

### **EdVisions Cooperative Site Profiles**

The source for most of the data presented in these EdVisions site profiles is the Minnesota Charter School Directory on the Center for School Change website: <http://www.centeforschoolchange.org/main.asp>. The Center for School Change obtained its data from the Minnesota Department of Education for the 2001-2002 school year.

An asterisk (\*) indicates data is retrieved from Greatschools.net, a supplemental source: <http://www.greatschools.net/modperl/go/MN>. Greatschools’

data comes from the National Center for Educational Statistics for the 2001-2002 school year.

### **Avalon Charter School**

**CONTACT:** Andrea Martin  
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1745 University Avenue  
St. Paul, MN 55104  
Phone: 651-649-5495  
Fax: 507-649-5432  
Web site: [www.avalonschool.org](http://www.avalonschool.org)

**SPONSOR:** Hamline University  
**TPP ESTABLISHED/SCHOOL OPENED:** 2001  
**GRADE LEVELS SERVED:** 9-12  
**YEAR OF LAST FINANCIAL AUDIT:** 2002-2003

**CHARTERED SCHOOL BOARD MAKE-UP:** 5 EdVisions site team members, 3 parents, 1 community member, 2 students (non-voting members)

**# OF EDVISIONS SITE TEAM MEMBERS:** 12  
**# OF LICENSED SPECIALISTS:** 12  
**# OF NON-LICENSED PERSONS:** 0

**STUDENTS:**  
Enrollment: 123  
Male: 47% Female: 53%

American Indian: 4%\*  
African American: 13%\*  
Asian: 12%\*  
Hispanic: 4%\*  
Caucasian: 68%\*

Limited English Proficiency: 1%  
Free and Reduced Price Lunch: 9%  
Special Education: 9%  
Mobility: 104 students were admitted, and 108 were enrolled as of March 2002

**ATTENDANCE RATE:** Average Daily Membership was 119 students.

**GRADUATION RATE:** unavailable

**TESTS:** SAT-9 BST

**UNIQUE FEATURES:** project-based learning; multi-age grouping

### **El Colegio Charter School**

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Minneapolis, MN 55407  
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Fax: 612-728-5790  
Web site: [www.el-colegio.org](http://www.el-colegio.org)

**SPONSOR:** Augsburg College  
**TPP ESTABLISHED/SCHOOL OPENED:** 2000

**GRADE LEVELS SERVED:** 9-12  
**YEAR OF LAST FINANCIAL AUDIT:** 2002-2003

**CHARTERED SCHOOL BOARD MAKE-UP:** 3 EdVisions site team members, 1 parent, 1 community member  
**# OF EDVISIONS SITE TEAM MEMBERS:** 7  
**# OF LICENSED SPECIALISTS:** 7  
**# OF NON-LICENSED PEOPLE:** 0

**STUDENTS:**  
 Enrollment: 75  
 Male: 46% Female: 54%

American Indian: 6%  
 African American: 8%  
 Asian: 1%  
 Hispanic: 69%  
 Caucasian: 16%

English Language Learner: 50%  
 Free and Reduced Price Lunch: 66%  
 Special Education: 6%  
 Mobility: 133 unique students were served, while enrollment averaged 75.

**ATTENDANCE RATE:** 67%  
**GRADUATION RATE:** 2002 had a class of 8 graduates. Traditional definitions for graduation rates do not apply, as many students entered El Colegio behind on credits.  
**TESTS:** BST NALT

**UNIQUE FEATURES:** project-based learning; bilingual education (Spanish and English)

### Lafayette Charter School

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 351-6th Street  
 Phone: 507-228-8943  
 Fax: 507-228-8288  
 Web site: www.lafayettecharter.k12.mn.us

**SPONSOR:** Gibbon, Fairfax, & Winthrop School District  
**TPP ESTABLISHED/SCHOOL OPENED:** 1999  
**GRADE LEVELS SERVED:** K-8  
**YEAR OF LAST FINANCIAL AUDIT:** 2002-2003

**CHARTERED SCHOOL BOARD MAKE-UP:** 4 EdVisions site team members, 3 parents

**# OF EDVISIONS SITE TEAM MEMBERS:** 10  
**# OF LICENSED SPECIALISTS:** 10  
**# OF NON-LICENSED PEOPLE:** 0

**STUDENTS:**  
 Enrollment: 91  
 Male: 53% Female: 47%

Limited English Proficiency: unavailable  
 Free and Reduced Price Lunch: 67%  
 Mobility: unavailable

**ATTENDANCE RATE:** 96%  
**GRADUATION RATE:** unavailable  
**TESTS:** ITBS MCA  
**OTHER EVALUATION METHODS/TOOLS:** parental involvement; ability for students to work out of grade level

### Minnesota New Country School

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 Henderson, MN 56004  
 Phone: 507-248-3353  
 Fax: 507-248-3604  
 Web site: www.mncs.k12.mn.us

**SPONSOR:** LeSueur/Henderson School District  
**TPP ESTABLISHED/SCHOOL OPENED:** 1994  
**GRADE LEVELS SERVED:** 7-12  
**YEAR OF LAST FINANCIAL AUDIT:** 2002-2003

**CHARTERED SCHOOL BOARD MAKE-UP:** 4 EdVisions site team members, 3 parents

**# OF EDVISIONS SITE TEAM MEMBERS:** 9  
**# OF LICENSED SPECIALISTS:** 9  
**# OF NON-LICENSED PEOPLE:** 0

**STUDENTS:**  
 Enrollment: 115  
 Male: 57% Female: 43%

African American: <1%\*  
 Hispanic: 7%\*  
 Caucasian: 92%\*

Limited English Proficiency: 0%  
 Free and Reduced Price Lunch: 26%  
 Mobility: 7%

**ATTENDANCE RATE:** 77.6%  
**GRADUATION RATE:** 79 students have graduated since 1995  
**TESTS:** BST SAT-9  
**UNIQUE FEATURES:** Project-based learning; no classes, no bells; service learning projects

### Nerstrand Elementary School

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 205 Second Street South  
 Nerstrand, MN 55053  
 Phone: 507-333-6850  
 Fax: 507-333-6870  
 Web site: www.faribault.k12.mn.us/ner

**SPONSOR:** Faribault School District  
**TPP ESTABLISHED/SCHOOL OPENED:** 1999  
**GRADE LEVELS SERVED:** K-5  
**YEAR OF LAST FINANCIAL AUDIT:** 2002-2003

**CHARTERED SCHOOL BOARD MAKE-UP:** 4 EdVisions site team members, 3 parents  
**# OF EDVISIONS SITE TEAM MEMBERS:** 10  
**# OF LICENSED SPECIALISTS:** 10  
**# OF NON-LICENSED PEOPLE:** 0

**STUDENTS:**

Enrollment: 151  
 Male: 49% Female: 51%

African American: 1%\*  
 American Indian: 1%\*  
 Caucasian: 97%\*

Limited English Proficiency: 0%  
 Free and Reduced Price Lunch: 17%  
 Special Education: 8%  
 Mobility: unavailable

**ATTENDANCE RATE:** 96%  
**GRADUATION RATE:** unavailable  
**TESTS:** ITBS MCA  
**UNIQUE FEATURES:** Multi-age grouping; service learning emphasis

**Riverbend Academy**

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 Mankato, MN 56001  
 Phone: 507-387-5524  
 Fax: 507-387-5680  
 Web site: www.riverbendacademy.com

**SPONSOR:** MN Department of Education  
**TPP ESTABLISHED/SCHOOL OPENED:** 2000  
**GRADE LEVELS SERVED:** 7-12  
**YEAR OF LAST FINANCIAL AUDIT:** 2002-2003

**CHARTERED SCHOOL BOARD MAKE-UP:** 5 EdVisions site team members, 1 parent, 1 community member

**# OF EDVISIONS SITE TEAM MEMBERS:** 15  
**# OF LICENSED SPECIALISTS:** 15  
**# OF NON-LICENSED PEOPLE:** 0

**STUDENTS:**

Enrollment: 145  
 Male: 67% Female: 33%

African American: <1%\*  
 Asian: <1%\*  
 Hispanic: 5%\*  
 Caucasian: 94%\*

Limited English Proficiency: 0%  
 Free and Reduced Price Lunch: 23%  
 Mobility: Students continue to enroll in and leave Riverbend Academy at a high rate. Throughout the year, enrollment fluctuated between 135 and 165 students. 107 of those

students attended during the entire year. Those students represent the core of the student population.

**ATTENDANCE RATE:** unavailable  
**GRADUATION RATE:** unavailable  
**TESTS:** BST MCA SAT-9  
**UNIQUE FEATURES:** Focus on visual and performing arts; technology integration

**River Heights Charter School**

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 West Saint Paul, Minnesota 55118  
 Phone: 651-457-7427  
 Fax: 651-554-7611  
 Web site: www.riverheightscharter.org

**# OF EDVISIONS SITE TEAM MEMBERS:** 6  
**STUDENT ENROLLMENT:** 90

Teachers at River Heights Charter School (RHCS), which opened in September 2004, joined EdVisions Cooperative as associate members on May 24, 2004. Additional data was not available at time of publication.

Teachers' desire to establish and work within a teacher-owned professional organization was a major reason why they created RHCS. The founders, formerly teachers at a district alternative education program, were uncertain that the district they worked for would sustain the learning program that had worked so well for the students. They believed that establishing and belonging to a teacher professional practice would be the surest means of sustaining the program and implementing other ideas for operating a school and serving students well.

Teachers collectively maintain a student-centered, highly motivating learning environment in which each person feels important and valued. They strive for an environment that encourages creativity, risk-taking, high-quality work and achievement, and sharing knowledge and skills.

Teachers also work with students to develop an expectation of mutual respect and trust, continuous communication and improvement, a "try-it" attitude, perseverance, purposeful activity, and cooperation in order to maintain a high-quality, interactive school.

**SAGE Academy**

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 Marilyn Thompson, Program Director  
 3900 85<sup>th</sup> Avenue  
 Brooklyn Park, MN 55443  
 Phone: 763-315-4020

**SPONSOR:** Osseo School  
**TPP ESTABLISHED/SCHOOL OPENED:** 2002  
**GRADE LEVELS SERVED:** 9-12  
**YEAR OF LAST FINANCIAL AUDIT:** 2002-2003

**CHARTERED SCHOOL BOARD MAKE-UP:** 4 EdVisions site team members, 2 parents

**# OF EDVISIONS SITE TEAM MEMBERS:** 9

**# OF LICENSED SPECIALISTS:** 7

**# OF NON-LICENSED STAFF:** 2

**STUDENTS:**

Enrollment: 61

Students of Color: 23%

Limited English Proficiency: 0%

Free and Reduced Price Lunch: 20%

Special Education: 15%

Mobility: 4%

**ATTENDANCE RATE:** 95.5%

**GRADUATION RATE:** unavailable

**TESTS:** unavailable

**UNIQUE FEATURES:** Mentorship; service learning; project and expeditionary-based learning

## Wisconsin

As of August 2004, the TPPs formed by Wisconsin teachers were all cooperatives serving instrumentality-chartered schools of Milwaukee Public Schools (MPS). In Wisconsin, the chartering authority resides with the school district, except in Milwaukee and Racine, where other entities can be, are, charter authorizers. Still, over ninety percent of schools chartered by the Milwaukee and Racine districts are legally established as instrumentalities of the districts.

All non-instrumentality chartered schools in Wisconsin must arrange a contract with a non-district entity that deals with administrative tasks, hiring, compensation, and so on. In instrumentality-chartered schools, the sponsoring district is responsible for these tasks.

For some instrumentality-chartered schools, however, MPS has given teacher-cooperatives the authority to handle all or some aspects of such duties. The teacher cooperatives are formally approved to carry out these tasks by waivers they receive from the master contract under a memorandum of understanding with the union and MPS.

Teachers who run a cooperative in Milwaukee collectively accept the authority and responsibility for the success of the school while remaining employees of MPS

(under the district's master contract) and dues-paying members of the teachers' union.

According to John Parr, a Milwaukee-based national leader in establishing TPPs, Wisconsin teachers are restricted to the option of operating an instrumentality charter school if they wish to participate in the State Teachers Retirement System and be covered by a master labor contract.

The first three cooperatives discussed below—ALAS, ALBA, and Community High School Cooperatives—opened in fall 2004. Consequently, these profiles are not as detailed as the fourth, fifth, and sixth profiles for the more established I.D.E.A.L. Charter School, Phoenix High School, and P.L.I. Cooperatives.

## **ALAS Cooperative (Advanced Language and Academic Studies High School)**

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ALAS is a Spanish word that means wings. The chartered Advanced Language and Academic Studies High School (an instrumentality of the district) was started by a group of eight bilingual teachers who left South Division High School, a traditional district school, along with a group of parents and Sandra Pucci, an assistant professor in bilingual education at the University of Wisconsin-Milwaukee.

ALAS is a four-year bilingual high school serving grades 9 through 12. ALAS has approximately 250 students (some recruited from South Division) and is housed within Kosciuszko Middle School, where enrollment is down to about 600 students because Milwaukee Public Schools (MPS) is transitioning to more kindergarten-to-eighth grade schools.

ALAS Cooperative contracts with Milwaukee Public Schools to provide a rigorous, balanced curriculum promoting high levels of academic bilingualism/biliteracy at ALAS High School. The Cooperative leads the school to work with community members and institutions of higher learning to build a curriculum according to best practices, as established through educational research, emphasizing interdisciplinary links between subject areas.

The Cooperative not only emphasizes science, mathematics, and technology, but also these subjects' connection to the humanities and language. Respect for social class, school culture, and climate are a cornerstone of the program, as are high expectations for all students.

The Cooperative's goal is to graduate productive citizens who are prepared to enter university programs and who are also capable of getting on a career track to family-supporting employment.

ALAS Cooperative integrates the concept of "culturally relevant teaching" (Ladson-Billings, 1994) into this framework. The concept enforces the notions of community-building, cultivation of relationships beyond school walls, and an atmosphere of collaboration and mutual responsibility.

The pedagogical lens is one of "transformative pedagogy" which Cummins (2000) describes as using "collaborative critical inquiry to enable students to analyze and understand the social realities of their own lives and of their communities."

ALAS Cooperative leaders say their instruction goes beyond the "sanitized curriculum" still prevalent in most educational settings and is, by definition, anti-racist, anti-linguicism, anti-sexist, and anti-classist. The Cooperative's mission is to foster critical, life-long learners who know how to access, interpret and critically use new and emerging information.

To achieve this mission, the Cooperative believes it must give parents of ALAS High School students a strong voice in planning and governance, the feeling of being

valued and accepted, and opportunities to increase participation in their children's education.

The group that planned ALAS High School received two planning grants totaling \$100,000. One grant of \$50,000 came from the Gates Foundation [distributed through TALC, the Technical Assistance and Leadership Center ([www.talcnewvision.org](http://www.talcnewvision.org))], in partnership with MPS. The other \$50,000 grant came from the state Department of Public Instruction.

## **ALBA Cooperative (Academia de Lenguaje y Bellas Artes)**

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ALBA Cooperative contracts with Milwaukee Public Schools to provide the educational program to the Academia de Lenguaje y Bellas Artes (ALBA School), an instrumentality charter school serving grades P-5.

Parents, community members, and teachers with strong beliefs in bilingual education and the fine arts joined together to create ALBA, a neighborhood school contributing artistic and cultural resources in the community. The school serves a maximum population of 225 regular and exceptional education students from four-year-old kindergarten through the fifth grade.

ALBA, which means the dawn of a new day in Spanish, offers a new opportunity in bilingual elementary education by not only providing a developmental bilingual Spanish program, but also curriculum which integrates the fine arts and creative writing with emphasis on the Latino contributions and cultural art.

Teachers belonging to ALBA Cooperative are able to adapt the curriculum to individual learning strengths while maximizing learning through a respectful, nurturing, and encouraging environment where parents, teachers, and community members work in cooperation.

ALBA's educational program is founded on the conviction that bilingual students can reach their full potential academically, in English and Spanish, when challenged through a rigorous curriculum that develops critical thinking, problem solving skills, and creativity.

The learning environment aids in fostering Hispanic cultural identity and appreciation through the connections made from strong parental support and community involvement. ALBA Cooperative leaders say that instruction in the native language, Spanish, English language proficiency, and fine arts focusing on cultural art forms aid the students in their creation of a positive self identity.

Teachers prepare students to be bilingual and bicultural learners in a global society. They believe native language literacy is a critical component in developing academic English.

## Community High School Cooperative

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The Community High School Cooperative contracts with Milwaukee Public Schools to provide the educational program to Community High School (9-12). The Community High School Cooperative offers an inquiry-based and ability-based curriculum, project-based learning, and a large service-learning component. The Cooperative emphasizes:

1. Close partnerships with parents and Community High School's community;
2. Personalized instruction to address individual needs and interests;
3. A climate where teachers and students know each other well and work in an atmosphere of trust and high expectations;

4. Democratic and equitable school policies and practice; and
5. Research-based design influences.

## I.D.E.A.L. Charter School Cooperative

**Legal Structure:** Cooperative, under Wisconsin Statute, Chapter 185. The Cooperative is also a 501(c)(3) corporation under the Internal Revenue Code. That is, it is a nontaxable nonprofit organization.

**Site served:** I.D.E.A.L. Cooperative contracts with Milwaukee Public Schools to deliver educational services to I.D.E.A.L. Charter School, which is an instrumentality of Milwaukee Public Schools (MPS).

**Governing Board:** I.D.E.A.L. Charter School Cooperative (I.D.E.A.L. Cooperative) does not operate under a governing board, but instead via three committees that members elect: Finance, Personnel, and Curriculum. Committee responsibilities are detailed later in this profile.

The Curriculum Committee is made up of cooperative members only. The Finance and Personnel Committees are made up of members of I.D.E.A.L. Cooperative and one member of the Shared Governance Council for I.D.E.A.L. Charter School (SGC). The SGC is made up of parents, teachers, and community members of the school.

**TPP mission, vision, values:** I.D.E.A.L. Cooperative exists to provide a professional organization for teachers who strongly believe in individualized, developmental, and educational approaches to learning. The cooperative is rooted in the wisdom and success of I.G.E. (Individually Guided Education), combining current research and successful practice to create a technology-rich curriculum that will prepare our students for the future. They also value creating and working in a learning environment that is child-centered, promoting active learning and exploration.

**Compensation:** Currently, all of the teacher cooperatives in Milwaukee operate chartered schools that are legally established as instrumentalities of Milwaukee Public Schools. This arrangement allows teachers to remain

**I.D.E.A.L. Charter School Cooperative**  
**Site Profile: I.D.E.A.L. Charter School**

**COOPERATIVE AND SITE CONTACT:**

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**DISTRICT:** Milwaukee Public Schools (MPS)  
**TPP ESTABLISHED/SCHOOL OPENED:** 2001  
**GRADE LEVELS SERVED:** K-8  
**ENROLLMENT:** 196  
**CLASS SIZE:** 22  
**NUMBER OF SCHOOL DAYS:** 182  
**YEAR OF LAST FINANCIAL AUDIT:** 2003

**SHARED GOVERNANCE COUNCIL (SCHOOL BOARD) MAKE-UP:** 13 total. Teachers, community member, education assistant, and parents (3)

**# OF COOPERATIVE MEMBERS:** 11  
**# OF LICENSED SPECIALISTS:** 11  
**# OF NON-LICENSED STAFF:** 0

**STUDENTS:**  
 Male: 60%      Female: 40%

African American: 26%  
 Caucasian: 50%  
 Other: 24%

Free and Reduced Price Lunch: 56%  
 English Language Learner: 10%  
 Mobility: N/A

**ATTENDANCE RATE:** 94%  
**GRADUATION RATE:** 100%

**TESTS:** WKCE  
**OTHER EVALUATION METHODS/TOOLS:** Portfolio assessment of student work quarterly and annually. Portfolio is comprised of writing samples, teacher evaluations, math assessments, and more.

**TECHNOLOGY:** 50 desktop computers; 50 wireless laptops; a media center; computer-equipped classrooms; school-wide network.

employees of MPS (under the master contract) and dues-paying members of the union. Consequently, teachers who

are members of I.D.E.A.L. Cooperative receive their salaries according to the salary scale outlined in the collective bargaining agreement. They also receive the same pension and other benefits negotiated by their bargaining unit—Milwaukee Teachers Education Association (MTEA).

**Membership structure:** All full-time teachers at I.D.E.A.L. Charter School are members of the Cooperative. All members have the same rights and privileges. There are not any capital requirements.

Teachers do not have the authority to hire and fire. Ultimately, these decisions are the responsibility of MPS because of I.D.E.A.L.'s status as an instrumentality chartered school. Still, members have the right to interview and recommend that teachers be hired or removed from the school.

If the members ask the district to remove a teacher, and the district approves, that teacher would then go back into the general MPS pool of employees. Membership in the cooperative is terminated when the teacher is reassigned to another school.

I.D.E.A.L. Cooperative members also have the right to select their leaders. They vote to select their committee leadership and their Lead Teacher. The Lead Teacher acts as a liaison between MPS and I.D.E.A.L. Cooperative, as well as between cooperative members and the various committees. The Lead Teacher also facilitates staff meetings, professional development, curriculum, and so on. The Lead Teacher does not have final decision-making authority, however. The three governing committees make most administrative decisions.

**Performance measurement and improvement:**  
 Under a memorandum of understanding with MPS and the MTEA, I.D.E.A.L. Cooperative members use a peer review system that is a modification of the one required under the master contract. The memorandum requires: (1) that formal evaluation is completed at a specific time of the year, and (2) that a committee reach consensus about the teacher being evaluated.

The committee, determined by I.D.E.A.L. Cooperative members, is comprised of the teacher, a peer of the teacher's choice, the Lead Teacher (if the person being evaluated is not tenured), and a parent. This group does not necessarily reach consensus about each area of evaluation, but consensus about what rating will be submitted on the form submitted to MPS's Central Office. The form reduces all evaluation to one word (e.g. "superior," "satisfactory," "needs improvement").

The memorandum does not require that every staff member be evaluated annually. MPS provides I.D.E.A.L. Cooperative with a list of the teachers who it is required to evaluate. I.D.E.A.L. Cooperative typically decides to evaluate all staff members on an annual basis anyway. Members believe it encourages growth, learning, and cooperation in helping one another to improve.

An evaluation of "unsatisfactory" could result in the teacher being removed from the school. The district would then be responsible for determining the status and assignment of the teacher for the following year. The committee can determine whether there is a conflict between the teacher's individual responsibility and the philosophy of the school. In that case, the district will automatically reassign the teacher to a different school but the teacher will not have a negative stroke on her or his record.

**Start-up funding:** I.D.E.A.L. Charter School received \$150,000 in start-up funding from the Wisconsin Department of Public Instruction, the entity that administers the federal grant money to start charter schools in Wisconsin.<sup>2</sup>

**Sources of revenue:** The ongoing source of revenue for I.D.E.A.L. Cooperative is the contract it has with Milwaukee Public Schools to serve I.D.E.A.L. Charter School. Since the school it serves is an MPS Instrumentality Charter School, the *district* (and not the school itself) receives the funding from the state on a per-pupil basis. The

district then sends the money to the school (see "Financial management for the cooperative," below). In addition, I.D.E.A.L. Cooperative receives funding for state programs, including Title I funds (again, channeled through the district) based upon the percentage of the student body that is eligible for free and reduced-price lunch. Like any other public school, I.D.E.A.L. is eligible to receive special education funding, bilingual education funding, as well as funding from Wisconsin's Student Guarantee in Education (SAGE) program (aimed at reducing class sizes in the earliest grades).

**Determining fees to charge the schools served (teaching, administration):** I.D.E.A.L. Cooperative does not determine the fees it will charge to the school for its services since the prevailing contract between MPS and the Cooperative allows the district to set its own administrative fee and since teachers' salaries are determined by the salary scale outlined in the collective bargaining agreement. I.D.E.A.L. Cooperative just uses whatever funds remain to operate the school and does not seek to earn dividends.

**Financial management for the cooperative:** Since I.D.E.A.L. Charter School is an instrumentality of Milwaukee Public Schools, the school's funds are administered through MPS, which receives per-pupil funding (and any other special program funding) from the state. Any grants the school might receive would also go directly to MPS. The district transfers these funds, less an approximately two to three percent administrative charge, to I.D.E.A.L. Cooperative to run the school. Examples of these administrative "charge backs" include testing services, audit reports, cost for a principal coach, district-level disciplinary hearings, and building maintenance.

I.D.E.A.L. Cooperative does not conduct financial management for the cooperative itself, but views cooperative financial management and the school's financial management as one and the same.

**Financial management for the site:** The Finance Committee of I.D.E.A.L. Cooperative manages school and cooperative finances. The committee presents a budget to

<sup>2</sup> Unlike other P.L.I. and Phoenix High School Cooperatives, below, I.D.E.A.L. Cooperative was not eligible for a grant from the Gates-EdVisions Project because the Project's funding was limited to partnerships starting high schools, and I.D.E.A.L. Charter School serves grades K-8.

the entire Shared Governance Council (SGC) of I.D.E.A.L. Charter School for approval. The SGC has final authority —at the cooperative level—over the entire budget with the exception of the salaries, which must be as specified under the master contract. I.D.E.A.L. Cooperative submits the final budget to MPS for review and approval.

**Liability and business insurance:** I.D.E.A.L.

Cooperative contracts with MPS to handle the purchasing of liability and business insurance.

**Administration (payroll, records, benefits, purchasing, legal services, etc.):** MPS provides all administrative services to I.D.E.A.L. Cooperative, and makes an administrative charge to the cooperative (see “Financial management for the cooperative,” above) for these expenses prior to transferring funds owed to the cooperative for providing the education program. MPS administration includes payroll, legal services, food services, physical plant, and benefits (including Social Security, pensions, and worker’s compensation).

**Long-term goals:** Every year, the entire I.D.E.A.L. Coop membership and the Governance Board of I.D.E.A.L. Charter School develop an Education Plan that identifies specific short and long-term goals (including those required by the No Child Left Behind Act).

**Learning program:** I.D.E.A.L. Cooperative members have responsibility and accountability for the performance of the learning program. The Curriculum Committee determines the learning program and reports to the SGC on activities and evaluation at least once a year. The Cooperative must submit their Educational Plan to MPS for review and approval.

I.D.E.A.L. Cooperative forms its education program around five major constructs: (1) Multi-aged, inclusive classrooms; (2) Shared governance model where the school is managed by teachers and governed by parents, students, teachers, and community members; (3) Students actively engaged in meaningful learning; (4) Assessment by performance, product and demonstration; and (5) Community involvement.

## Phoenix High School Cooperative

**Legal Structure:** Phoenix High School Cooperative is not a legal entity. Teachers behave as if they were part of a legal cooperative, however.

**Governing Board:** Phoenix High School Cooperative does not have a governing board for the cooperative alone, and does not legally need to have one given that the cooperative is not a legal entity. The governing board for the school is an “Advisory Council.” As of August 2004, the council had four parents, three staff members, and at least one student. At Advisory Council meetings, the council, in conjunction with all cooperatively behaving teachers at Phoenix High School, helps manage the school by making policy decisions and developing and approving its budget.

**Site served:** Phoenix Cooperative contracts with Milwaukee Public Schools to deliver educational services to Phoenix High School, a chartered school that is an instrumentality of Milwaukee Public Schools (MPS).

**TPP mission, vision, values:** The Cooperative’s mission is to help every student it serves develop the skills and abilities to become successful and productive citizens in a constantly changing global economy.

The Cooperative based Phoenix High School upon the guiding principles of Ted Sizer’s Coalition of Essential Schools ([www.essentialschools.org](http://www.essentialschools.org)). The Coalition’s mission is to create and sustain equitable, intellectually vibrant, personalized schools and to make such schools the norm of American public education.

The Cooperative based its discipline values upon a philosophical framework called Circle of Courage, developed by Dr. Martin Brokenleg from Augustana College in South Dakota. For more information. Go to this web site: <http://www.augie.edu/dept/educ/andrews/courage/sld001.htm>

**Compensation:** Currently, all of the teacher cooperatives in Milwaukee operate chartered schools that are legally established as instrumentalities of Milwaukee Public Schools. This arrangement allows teachers to remain

### **Phoenix High School Cooperative Site profile: Phoenix High School**

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**DISTRICT:** Milwaukee Public Schools (MPS)  
**TPP ESTABLISHED/SCHOOL OPENED:** 2001  
**GRADE LEVELS SERVED:** 9-12  
**ENROLLMENT:** 132  
**CLASS SIZE:** 17  
**NUMBER OF SCHOOL DAYS:** 175  
**YEAR OF LAST FINANCIAL AUDIT:** 2003

**BOARD MAKE-UP:** Maximum of 4 teachers,  
maximum of 4 parents, maximum of 4 students

**# OF COOPERATIVE MEMBERS:** 10  
**# OF LICENSED SPECIALISTS:** 10  
**# OF NON-LICENSED STAFF:** 0

**STUDENTS:**

Male: 50%      Female: 50%

Asian: 1%  
African American: 91%  
Hispanic: 4%  
Caucasian: 4%  
Other: 1%

Free and Reduced Price Lunch: 67%  
English Language Learner: 0%  
Mobility: 13%

**ATTENDANCE RATE:** 74%

**GRADUATION RATE:** 61%

**TESTS:** WKCE TERRA NOVA

**OTHER EVALUATION METHODS/TOOLS:**

Learning Portfolio Presentations, Nelson Denny  
Reading, MPS Writing Proficiency, Language Arts  
Portfolio

**TECHNOLOGY:** School-wide PC server; 10T internet  
connection and e-mail through MPS; 70 Dell PCs; 4  
MAC multimedia stations; 2 MAC laptops

employees of MPS (under the master contract) and dues-paying members of the union.

Thus, teachers at Phoenix Cooperative receive their salaries according to the salary scale outlined in the collective bargaining agreement. Phoenix Cooperative members also receive the same pension and other benefits negotiated by their bargaining unit—Milwaukee Teachers Education Association (MTEA).

**Membership structure:** All full-time teachers at Phoenix High School are members of the cooperative. All members have the same rights and privileges. There are not any capital requirements.

Teachers do not have the authority to hire and fire. Ultimately, these decisions are the responsibility of MPS because of Phoenix's status as an instrumentality charter. Still, members have the right to interview and recommend that teachers be hired or removed.

If the members ask the district to remove a teacher, and the district approves, that teacher would then go back into the general MPS pool of employees. Membership in the cooperative is terminated when the teacher is reassigned to another school.

Phoenix Cooperative members also have the right to select their leaders. They vote to select their committee leadership and Teacher in Charge. The Teacher in Charge acts as a liaison between MPS and I.D.E.A.L. Cooperative, as well as between cooperative members and the various committees. The Teacher in Charge also facilitates staff meetings, professional development, and curriculum.

**Performance measurement and improvement:**  
Under a memorandum of understanding with MPS and the MTEA, Phoenix Cooperative members use a peer review system that is a modification of the one required under the master contract. The memorandum requires: (1) that formal evaluation is completed at a specific time of the year, and (2) that a committee reach consensus about the teacher being evaluated.

The committee is comprised of the teacher, a peer of the teacher's choice, a member of the Personnel Committee<sup>3</sup>, and a parent. This group does not necessarily reach consensus about each area of evaluation, but consensus about what rating will be submitted on the form submitted to MPS's Central Office. The form reduces all evaluation to one word (e.g. "superior," "satisfactory," "needs improvement"). To supplement the evaluation

<sup>3</sup> The Personnel Committee handles job performance issues and conflicts among the staff. It consists of four members of the staff.

process, the cooperative adopted the evaluation rubric developed by Minnesota New Country School.

An evaluation of “unsatisfactory” would result in the teacher being removed from the school. The district would then be responsible for determining the status and assignment of the teacher for the following year. The committee can determine whether there is a conflict between the teacher’s individual responsibility and the philosophy of the school. In that case, the district will automatically reassign the teacher to a different school but the teacher will not have a negative stroke on her or his record.

**Start-up funding:** Phoenix Cooperative and Phoenix High School initially received a \$10,000 planning grant from the Gates-EdVisions Project in addition to \$150,000 from the Wisconsin Department of Public Instruction for the first two years. The Gates-EdVisions Project granted an additional \$87,500 in 2004 and is scheduled to grant \$50,000 in 2005. Percentages used for school start-up and cooperative start-up were not available, though a good majority of the aforementioned dollars were spent on school start-up.

**Sources of revenue:** The ongoing source of revenue for Phoenix Cooperative is the contract it has with Milwaukee Public Schools to serve Phoenix High School. Since Phoenix High School is an MPS Instrumentality Charter School, the *district* (and not the school itself) receives funding from the state on a per-pupil basis. The district then sends the money to the school (see “Financial management for the cooperative,” below).

In addition, Phoenix Cooperative receives funding for state programs, including Title I funds (again, channeled through the district) based upon the percentage of the student body that is eligible for free and reduced-price lunch. Like any other public school, Phoenix High School is eligible to receive special education funding, bilingual education funding, as well as funding from Wisconsin's Student Guarantee in Education (SAGE) program (aimed at reducing class sizes in the earliest grades).

**Determining fees to charge the schools served (teaching, administration):** Phoenix Cooperative does not determine the fees it will charge to the school for its services since the prevailing contract between MPS and the Cooperative allows the district to set its own administrative fee and since teachers’ salaries are determined by the salary scale outlined in the collective bargaining agreement. Phoenix Cooperative just uses whatever funds remain to operate the school and does not seek to earn dividends.

**Financial management for the cooperative:** Since Phoenix High School is an instrumentality chartered school of Milwaukee Public Schools, the school’s funds are administered through the district, which receives the per-pupil funding (and any other special program funding) from the state. Any grants the school might receive would also go directly to MPS. The district transfers these funds, less an approximately two to three percent administrative charge, to Phoenix Cooperative to run the school.

Examples of these administrative “charge backs” include testing services, audit reports, cost for a principal coach, district-level disciplinary hearings and building maintenance. Phoenix Cooperative does not conduct financial management for the cooperative itself, but views cooperative financial management and the school’s financial management as one and the same.

**Financial management at the site level:** The Phoenix High School Advisory Council (made up of staff, parents and students) develops the final version of the school’s budget, which is submitted to MPS for review and approval. The Advisory Council has final authority—at the cooperative level—over the entire budget with the exception of the salaries, which must be as specified under the master contract.

Phoenix Cooperative contracts with MPS for financial management of Phoenix High School. This allows the cooperative to access the district’s financial services and the district handles all forms and reports.

**Liability and business insurance:** The Cooperative contracts with MPS to handle the purchasing of liability and business insurance.

**Administration:** MPS provides all administrative services to Phoenix Charter School, and makes an administrative charge to Phoenix Cooperative for these expenses prior to transferring funds owed to Phoenix Cooperative for providing the education program (see “Financial management for the cooperative,” above). MPS administration includes payroll, legal services, food services, physical plant, and benefits (including Social Security, pensions, and worker’s compensation).

Payroll records are kept by the Phoenix High School secretary and authorized online by the Teacher in Charge. Phoenix Cooperative can administer purchasing through the MPS purchasing department. MPS charges a fee-for-service, yet purchasing via the district saves money because the district can negotiate the best prices given its buying power (it is responsible for approximately 160 schools). All students receive county bus passes. The school purchases a security aid from MPS.

The Phoenix High School Advisory Council makes policy decisions and approves the Education Plan, which is submitted to Milwaukee Public Schools as part of the school’s requirements to access Title I funding.

The Teacher in Charge is the direct liaison between MPS and Phoenix Cooperative and is ultimately held responsible for seeing that the charter is meeting the provisions set forth in the contract with MPS.

Teacher-members of Phoenix Cooperative make shared decisions about the day-to-day operations of the school. If the Teacher in Charge is on leave, the school still operates smoothly and effectively. Either a committee of teachers or the entire membership assigns teachers to duties (the latter taking place when the decision will affect most of the school). One teacher takes care of special education compliance. Another facilitates and reports on staff meetings. Another manages bookkeeping and the checking account. Another manages major breaches of discipline,

Title I including standardized testing, and the state-required “at-risk” reports.

**Long-term goals:** Every year, the entire Phoenix Cooperative membership and the Advisory Council of Phoenix High School develops an Education Plan that identifies specific goals (including those required by the No Child Left Behind Act.) As part of the plan, Phoenix Cooperative identifies base line data, sets measurable goals, identifies resources, and sets timelines for completion or evaluation of results.

**Learning program:** Phoenix Cooperative based its learning program upon the Coalition of Essential Schools principles and the project-based model developed by the Minnesota New Country School and EdVisions Cooperative. The teacher-members have identified nine core value areas: thinking; technology; autonomous learning; empathy; collaboration; communication; problem-solving; self-expression; pro-active citizenship. Teachers provide students with a rubric for each value and ask students to self-assess their current level of performance several times per school year.

Teachers expect students to collect evidence of their performance level and demonstrate their skills in these areas through the projects they create. At the end of the year, students make a portfolio presentation on their performance.

Phoenix Cooperative must submit their Educational Plan to MPS for review and approval.

## **Professional Learning Institute (P.L.I.) Charter School Cooperative**

**Legal Structure:** Cooperative, under Wisconsin Statute, Chapter 185. The Cooperative is also a 501(c)(3) corporation under the Internal Revenue Code. That is, it is a nontaxable nonprofit organization.

**Site served:** P.L.I. Charter School Cooperative (P.L.I. Cooperative) contracts with Milwaukee Public Schools to deliver educational services to P.L.I. Charter School, which is an instrumentality of Milwaukee Public Schools (MPS).

**Governing Board:** P.L.I. Cooperative operates under a governing board, and functions with three standing committees: Finance, Personnel, and Curriculum. Committee responsibilities are detailed later in this profile. The committees are made up of members of the P.L.I. Cooperative and of the Shared Governance Council for P.L.I. Charter School (SGC). The SGC is made up of parents, students, teachers, and community members of the school.

The P.L.I. Charter School is currently functioning with an interim board, as 2003-2004 was its first school year.

**TPP mission, vision, values:** P.L.I. Cooperative has the following vision for the chartered school it serves: Picture a school where every student feels important, wanted and protected. Picture a school where every student develops confidence in her/his abilities, pursues new skills and knowledge while learning not to fear mistakes. Picture a school where every student feels in control of themselves and their destiny and accepts responsibility for self and actions. Picture a school where every student gives back to the school and community by sharing effort, knowledge, and time.

The P.L.I. Cooperative's mission is to foster conditions that promote active learning for each individual student by following a continuous cycle of researching, planning, performing, analyzing, and applying results, so that all students not only meet district graduation requirements, but also develop the skills to be successful in life and whatever professions they choose.

P.L.I. Cooperative lives by core values that were determined by the P.L.I. Charter School student body during the first week of its first year. They include: pride, honesty, fun, respect, responsibility, determination, and teamwork.

**Compensation:** Currently, all of the teacher cooperatives in Milwaukee operate chartered schools that are legally established as instrumentalities of Milwaukee Public Schools. This arrangement allows teachers to remain

employees of MPS (under the master contract) and dues-paying members of the union.

Teachers in P.L.I. Cooperative, then, receive their salaries according to the salary scale outlined in the collective bargaining agreement. They also receive the same pension and other benefits negotiated by their bargaining unit—Milwaukee Teachers Education Association (MTEA).

**Membership structure:** All full-time teachers at P.L.I. are members of the Cooperative. All members have the same rights and privileges. There are no capital requirements.

### **P.L.I. Charter School Cooperative** **Site Profile: P.L.I. Charter School**

**COOPERATIVE AND SITE CONTACT:**

Cris Parr  
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4965 South 20<sup>th</sup> Street  
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Phone: 414-304-6180

**DISTRICT:** Milwaukee Public Schools (MPS)  
**TPP ESTABLISHED/SCHOOL OPENED:** 2003  
**GRADE LEVELS SERVED:** 9, 10, 11 (will add 12)  
**ENROLLMENT:** 136  
**CLASS SIZE:** 17  
**NUMBER OF SCHOOL DAYS:** 182  
**YEAR OF LAST FINANCIAL AUDIT:** N/A

**BOARD MAKE-UP:** 4 advisors, 2 community members, 3 parents, 1 student (interim board)  
**# OF LICENSED SPECIALISTS:** 4  
**# OF NON-LICENSED STAFF:** 1

**STUDENTS:**

Male: 36%                      Female: 32%  
Asian: 2%  
Hispanic: 18%  
African American: 14%  
Caucasian: 32 %  
American Indian: 1%  
Other: 1%

Free and Reduced Price Lunch: 40%  
English Language Learner: 3%  
Mobility: N/A

**ATTENDANCE RATE:** 93%  
**GRADUATION RATE:** N/A  
**TESTS:** WKCE, TERRA NOVA, PSAT  
**OTHER EVALUATION METHODS/TOOLS:**  
Public Project Exhibitions, SRI Reading, MPS Writing Proficiency

**TECHNOLOGY:** School-wide PC server; 10T internet connection & e-mail through MPS; a Dell PC for each student; MAC multimedia stations; laptops

Teachers do not have the authority to hire and fire. Ultimately, these decisions are the responsibility of MPS because of P.L.I.'s status as an instrumentality chartered school. Still, members have the right to interview and recommend that teachers be hired or removed from the school. P.L.I. Cooperative members also have the right to select their leaders. They vote to select their governing board.

If the members ask the district to remove a teacher, and the district approves, that teacher would then go back into the general MPS pool of employees. Membership in the Cooperative is terminated when the teacher is reassigned to another school.

**Performance measurement and improvement:**

Under a memorandum of understanding with MPS and the Milwaukee Teachers Education Association (MTEA), P.L.I. Cooperative members use a peer review system that is a modification of the one required under the master contract. The memorandum requires: (1) that formal evaluation is completed at a specific time of the year, and (2) that a committee reach consensus about the teacher being evaluated.

The committee, determined by P.L.I. Cooperative members, is comprised of the teacher, a peer of the teacher's choice, the Lead Teacher (if the person being evaluated is not tenured), and a parent. The committee heavily considers students' and parents' evaluations for each teacher who they evaluate. The committee does not necessarily reach consensus about each area of evaluation, but consensus about what rating will be submitted on the form submitted to MPS's Central Office. The form reduces all evaluation to one word (e.g. "superior," "satisfactory," "needs improvement").

The memorandum does not require that every staff member be evaluated annually. MPS provides P.L.I. Cooperative with a list of the teachers who it is required to evaluate. P.L.I. Cooperative typically decides to evaluate all staff members on an annual basis anyway. Members believe it encourages growth, learning, and cooperation in helping one another to improve.

An evaluation of "unsatisfactory" could result in the teacher being removed from the school. The district would then be responsible for determining the status and assignment of the teacher for the following year. The committee can determine whether there is a conflict between the teacher's individual responsibility and the philosophy of the school. In that case, the district will automatically reassign the teacher to a different school but the teacher will not have a negative stroke on her or his record.

**Start-up funding:** P.L.I. Cooperative received start-up funding from the Gates-EdVisions Project.

**Sources of revenue:** The ongoing source of revenue for P.L.I. Cooperative is the contract it has with Milwaukee Public Schools to serve P.L.I. Charter School. Since the school it serves is an MPS Instrumentality Charter School, the *district* (and not the school itself) receives the funding from the state on a per-pupil basis.

The district then sends the money to the school (see "Financial management for the cooperative," below). In addition, P.L.I. Cooperative receives funding for state programs, including Title I funds (again, channeled through the district) based upon the percentage of the student body that is eligible for free and reduced-price lunch.

Like any other public school, P.L.I. is eligible to receive special education funding, bilingual education funding, as well as funding from Wisconsin's Student Guarantee in Education (SAGE) program (aimed at reducing class sizes in the earliest grades).

**Financial management for the cooperative:** Since P.L.I. is an instrumentality chartered school of Milwaukee Public Schools, the school's funds are administered through the district, which receives the per-pupil funding (and any other special program funding) from the state. Any grants the school might receive would also go directly to MPS. The district transfers these funds, less an approximately two to three percent administrative charge, to P.L.I. Cooperative to run the school.

Examples of these administrative "charge backs" include testing services, audit reports, cost for a principal

coach, district-level disciplinary hearings, and building maintenance. P.L.I. Cooperative does not conduct financial management for the cooperative itself, but views cooperative financial management and the school's financial management as one and the same.

**Financial management at the site level:** The Finance Committee of P.L.I. Cooperative presents a budget to the entire Shared Governance Council (SGC) of P.L.I. Charter School for approval. The SGC has final authority—at the cooperative level—over the entire budget with the exception of the salaries, which must be as specified under the master contract. The S.G.C. must also approve any purchases over \$5000. P.L.I. Cooperative submits the final budget to MPS for review and approval.

**Liability and business insurance:** P.L.I. Cooperative contracts with MPS to handle the purchasing of liability and business insurance.

**Administration (payroll, records, benefits, purchasing, legal services, etc.):** MPS provides all administrative services for the P.L.I. Charter School, and makes an administrative charge to P.L.I. Cooperative for these expenses prior to transferring funds owed to P.L.I. Cooperative for providing the educational program.

Payroll records are kept by P.L.I. High School's secretary and authorized online by the Lead Teacher. P.L.I. Cooperative can administer purchasing through the MPS purchasing department. MPS charges a fee-for-service, yet purchasing via the district saves money because the district can negotiate the best prices given its buying power (it is responsible for approximately 160 schools). All students receive county bus passes.

The P.L.I. High School Shared Governance Council makes policy decisions and approves the Education Plan, which is submitted to Milwaukee Public Schools as part of the school's requirements to access Title I funding.

The Lead Teacher is the direct liaison between MPS and P.L.I. Cooperative and is ultimately held responsible for seeing that the charter is meeting the provisions set forth in the contract with MPS.

Teacher-members of P.L.I. Cooperative make shared decisions about the day-to-day operations of the school. If the Lead Teacher is on leave, the school still operates smoothly and effectively.

Either a committee of teachers or the entire membership assigns teachers to duties (the latter taking place when the decision will affect most of the school). One teacher takes care of special education compliance. Another facilitates and reports on staff meetings. Another manages bookkeeping and the checking account. Another manages major breaches of discipline, Title I (including standardized testing), and the state-required "at-risk" reports.

Responsibilities are shared throughout the cooperative, rather than one person being charged with total administrative responsibility for the school.

**Long-term goals:** Every year, the entire P.L.I. Cooperative membership and the Shared Governance Council of P.L.I. High School develop an Education Plan that identifies specific goals (including those required by the No Child Left Behind Act). As part of the plan, P.L.I. Cooperative identifies base line data, sets measurable goals, identifies resources, and sets timelines for completion or evaluation of results.

**Learning program:** P.L.I. Cooperative members have control over and accountability for the performance of the learning program. The Curriculum Committee determines the learning program and reports to the SGC at least once a year. The Cooperative must submit their Educational Plan to MPS for review and approval. The program revolves around a personalized, "hands on" project, and internship-based approach. Each individual student's interests drive his/her projects.

## Teacher Professional Partnerships in the Planning Phase

The following efforts are very likely to result in teacher professional partnerships in fall 2005 and later.

Education/Evolving learned about these efforts while doing research on existing TPPs and those starting up before the 2004-2005 school year. This list may not be exhaustive.

## **Efforts Spanning Multiple States**

### **EdVisions Schools Project<sup>4</sup> Grant Recipients**

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Ron Newell, Learning Program Director  
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Shel Hiscock, Technical Assistance Specialist  
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EdVisions Schools Project  
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The EdVisions Schools Project awards grants of up to \$150,000 per school to groups of teachers, community organizers and business leaders who desire to create new small high schools. The grants are to develop and scale-up twenty innovative secondary schools over the next five years. Sites are selected on the basis of their commitment to the EdVisions Approach—development of a personalized, technology infused, project-based learning model and a cooperative, professional practice, or other teacher-ownership model of governance model. Some criteria for grantmaking include:

- Sites selected will aim to reach 100-200 students.
- Start-up and planning grants will not exceed \$10,000.

<sup>4</sup> EdVisions, Inc., the same nonprofit that operated the Gates-EdVisions Project, now runs the EdVisions Schools Project. EdVisions, Inc. was established as a “spin off” of EdVisions Cooperative when grantmakers showed interest in replicating the model. Staff of both organizations talk about the two as if they are one and the same. When Bill & Melinda Gates Foundation awarded EdVisions, Inc. two major grants to create a total of 35 schools demonstrating a commitment to development of the personalized, technology infused, project-based learning model and a teacher-owner model of governance, the effort was known as the Gates-EdVisions Project. The 35 initial grant sites were selected, and EdVisions, Inc. is now working on a national scale-up of similar schools. The new work is known as the EdVisions Schools Project. This paper distinguishes grantees of the Gates-EdVisions Project from grantees of the EdVisions Schools Project. Information on both is available at: [www.edvisions.coop](http://www.edvisions.coop).

- Scale-up grants are not to exceed \$1000 per student or \$90,000 per site.
- Enhancement grants are not to exceed \$500 per student or \$50,000.
- Total grants are not to exceed \$150,000.
- Each grantee will be required to provide a minimum 25 percent match from non-operational funds (i.e., staff development, technology, evaluation).
- Grant funds may not be spent on ongoing personnel costs at the site.

According to Shel Hiscock and Ron Newell, locations mentioned as having good potential to form TPPs, as of August 2004, were:

#### **Las Vegas, Nevada**

Teachers have “every intention” of establishing a TPP and will eventually do so.

#### **Reno, Nevada**

Teachers are nearing establishment of a TPP model, but the EdVisions Schools Project remains uncertain about the teacher’s ability to overcome legal challenges. Both the Las Vegas and Reno TPP developments are facing statutes that, in the Reno teachers’ view, may inhibit starting a TPP. First, there is not a requirement that teachers be on chartered school boards and, second, schools must have a licensed principal present who acts as the “CEO.” The EdVisions traditional model may not work, but EdVisions Schools and the teachers from Las Vegas are helping the Reno teachers to think about ways to overcome these issues.

#### **Fort Collins, Colorado**

The EdVisions Schools Project staff said teachers were close to receiving a grant, but haven’t had any “deep conversations” about TPPs, so the grant has been tabled for now. Fort Collins teachers are now in discussions about establishing a TPP, however.

## Fall River, Massachusetts

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 The Fulton Project  
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According to Shel Hiscock, of the EdVisions Schools Project, "The leadership of The Fulton Project has shown tremendous dedication and commitment to creating an innovative school program for the Fall River area. They have set the standard for planning groups interested in transforming school learning programs and governance models. We are pleased with their interest and look forward to having them as our first Massachusetts partner in the national scale-up effort under the Gates Foundation funding." EdVisions Schools Project staff says the school will likely receive additional implementation funds according to Hiscock.

## Los Angeles, California

See "California," below.

## California

**CONTACT:** Kennedy Rocker  
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A group of teachers from Indio, California, who were employees of two California chartered schools that closed in 2004<sup>5</sup>, are interested in establishing a teacher-owned Limited Liability Corporation called California Teacher Ownership (CTO, LLC). The teachers had originally planned to contract with Indio and Rosalyn Charter Schools to provide educational services, but will now form the LLC when and if they find a site, or create a site that desires their services.

The planning process began in 2001 when Kennedy Rocker acted on what she learned from a presentation made by EdVisions Cooperative and a Minnesota project called Education/Evolving while attending a national charter schools conference in Washington D.C. After the conference, Rocker went to Minnesota to set-up a blueprint for the legal structure, and since that time has been leading teachers in Indio, California to "take full responsibility and accountability for operating chartered schools." The following describes their plans:

**Legal Structure:** Limited Liability Corporation, under California's Beverly-Killea Limited Liability Company Act. The teachers are interested in having all of the attributes of a cooperative, but believe that under California law they will be able to best achieve their objectives by establishing an LLC.

**Governing Board:** The Governing Board of CTO, LLC will make decisions via a committee system. Teachers have yet to determine the committee roles and responsibilities, but there will likely be about five

<sup>5</sup> Rocker says that the schools' sponsor, the West Park School District, which over a period of time developed a "hostile" relationship with chartered schools in general, closed Indio and Rosalyn Charter Schools. These two, governed by the same nonprofit board, were the last of all schools sponsored by the West Park School District to have their charters revoked.

committees in total. The teachers intend to foster a community where all members have the same rights and privileges for LLC decision-making. Nevertheless, there is a distinction between the rights and privileges of “managing” and “participating” members (see “Membership Structure,” below).

**Sites served:** CTO, LLC will contract with the board that governs the school(s) it serves to deliver educational services.

**TPP mission, vision, values:** The mission of CTO, LLC will be to empower teachers and provide them with the authority and responsibility over the school’s business endeavors, and, ultimately, their professional destiny. CTO, LLC values democratic decision-making on issues involving the school and membership as a whole, and as sub-groups of members managing the grade levels.

**Membership structure:** CTO, LLC will have a two-tiered membership structure—managing members and participating members. Managing members will be responsible and accountable for all decisions of the LLC. They will hire and fire, make program changes, and allocate funds.

Participating members will be involved in conversations for all decision-making, having the ability to influence managing members, but they will not have the authority to contribute to decision-making. This is the formal policy. More informally, it is the LLC’s intention that the full community of teachers will make the decisions.

Yet to protect themselves from participating members who have less experience with working in a partnership setting and/or in a charter school setting, the managing members wish to reserve final authority in case it is necessary due to irresolvable disagreements.

Participating members will work for one year before being considered for managing membership, mainly because of their probable inexperience in charter school and/or partnership settings. Founding teachers believe incoming teachers should have a chance to adjust to financial, social and political risks involved before having full responsibility and accountability within CTO, LLC.

Participating members will need to work themselves into managing membership within three years so everyone works toward full responsibility. The intent of this requirement is to avoid the “blame game” that happens when some are in charge of others who have no real authority.

There will be an option to reduce status from managing to participating member, in the case that there is a period during which a member would like to assume less risk (when needing to take a leave, for example).

In the first year, Kennedy Rocker will appoint managing members. After one year, managing members will elect new managing members from the participating member pool. Managing members of the CTO, LLC will make a final decision on the membership process when they establish their partnership.

California law requires capitalization—so all members of CTO, LLC will contribute to the business to provide a “safe cushion.” Initially, managing members will contribute \$1000 and receive 2/3 of the profits, split. Participating members will contribute \$500 and receive 1/3 of the profits, split. All members will earn 10 percent interest on their capital investment. Their investment is at risk, however, so members could potentially lose their investment. Members can withdraw upon their retirement or if they leave the CTO, LLC.

The issue of whether all members will have equal shares in the LLC is still up for debate. Most of the people who will be managing members upon establishment are very interested in being able to purchase a larger stake in the LLC and increasing their share of the returns. The founding group is consulting with a financial expert to determine the issues surrounding this matter and to decide how and if this would work out.

**Performance measurement and improvement:** The potential members of CTO, LLC have borrowed a rubric from EdVisions Cooperative to assist them with their development of performance measurement. The teachers did a “trial run” in 2003, using the rubric. They will refine the

rubric to make it more descriptive, using a gradients-of-words method developed by John Wooden at UCLA.

This method will allow members to acknowledge development while still leaving room for growth. CTO, LLC developers say that the method also acknowledges that there's a lot of growth between a first-year teacher who can "barely find the role sheet" and a third-year teacher who is redirecting student behavior in the hall and connecting it to learning.

Gradient examples: cooperative vs. team member; self-control vs. poised. Potential members intend to evaluate one another as participants in the Team Teaching Groups (see "Learning Program," below) responsible for the learning program for specific grades, and as administrators responsible for overall management of the education program for the school sites.

**Compensation:** Each Team Teaching Group (see "Learning Program," below), which is responsible for democratically outlining their own budget and salaries, will determine the salaries for all teachers in their group. The idea is that a teacher's peers who will be most familiar with her or his background, performance, and goals will determine her or his salary.

The CTO, LLC will offer a spectrum of benefits to all members. Members will get a specific amount of money for benefits with the option to dedicate more of their salary to deductible benefits. Members will be compensated for taking on additional work for the CTO, LLC or for their Team Teaching Group within the LLC.

**Start-up funding:** The nonprofit board that governed the two chartered schools that formerly employed the teachers forming CTO, LLC put aside "general fund" money for the LLC's start-up. It was the Board's intent to hire CTO, LLC to provide the educational program to both schools.

Rocker contributed some additional start-up funding from her own pocket. The teachers also received a \$100,000 planning grant from the Gates-EdVisions Project. About 40 percent of the Gates-EdVisions money went to in-

service training for what would have been the now closed chartered schools' project-based learning initiative.

The remaining 60 percent went to TPP development (\$5,000 toward legal work for the establishment of the LLC and \$60,000 toward staff development and training for the LLC).

**Sources of revenue:** The ongoing source of revenue for the CTO, LLC will be the contract it has with the board governing the schools it will serve.

**Determining fees to charge the schools served (teaching, administration):** CTO, LLC has not yet decided how it will determine fees.

**Financial management:** The CTO, LLC will use zero-budgeting, meaning that for any given school year, the teachers will start with zero pre-determined budget allocations. The budget starts at zero and each item must be justified apart from previous year's budgets (no assumptions will be made about "carryovers").

The CTO, LLC members will break themselves into Team Teaching Groups (see "Learning Program," below) who will be responsible and accountable for management of the learning program for specific grade levels within the school(s) it serves.

Each teaching group will have its own budget, the size of which will be determined by the number of students served by their teaching group multiplied by the state per pupil funding amount. Managing members within each teaching group will lead and work with participating members in their groups to determine how funds will be allocated for their learning program.

CTO, LLC will outsource administrative financial management services. They will hire Team CFO, an organization specializing in financial management for nonprofits.

**Liability and business insurance:** The CTO, LLC has not yet determined how it will manage liability and business insurance.

**Administration:** The teachers will outsource services through Team CFO.

**Long-term goals:** The LLC will need to adhere to the goals outlined by the chartered schools they serve.

**Learning program:** All CTO, LLC members (who will be called “academic coaches” by students and families at the chartered schools) will be broken into subgroups (called “Team Teaching Groups”) that will be responsible for managing the learning program for a set of grade-levels (K-2; 2-4; and so on). Teaching groups will determine and manage the learning program for their grade levels served.

The teaching groups of CTO, LLC will use EdVisions’ project-based learning program, but mesh it with Gardner’s multiple intelligences. Core Knowledge will be used in some grades. Some other learning programs will be mixed in as well.

\*\*\*

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In addition to her work to establish California Teacher Ownership, LLC (see above), Kennedy Rocker is working with other chartered schools in the start-up phase on forming new, separate LLCs made up of teachers who will contract with schools to run their educational program.

Rocker believes that teacher-owned LLCs must stay small in order to have truly effective, democratic operations, so she would rather create more LLCs than grow current LLCs. Rocker is doing this development work voluntarily (without funding).

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**CONTACT:** Kathleen O’Sullivan  
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Kathleen O’Sullivan is a consultant focusing on identifying and cultivating start-up and existing schools committed to student-driven, project-based learning. She is

currently working with a start-up charter school development team in the Los Angeles garment district that received a planning grant from the EdVisions Schools Project. The founders are serious about starting a TPP to run a fashion design and technology high school, which is likely to open in 2005.

## **New Jersey**

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Teachers in Camden, New Jersey have plans to start a teacher-owned Camden Teachers Cooperative in September 2005 to contract for operation of a school they are also starting—Spirit Academy. Of the four teachers involved, two are from the Juvenile Resource Center (now called the Camden Center for Youth Development) and two currently teach in the Camden Public School system. The teachers and attorneys involved have developed a strategic plan, Articles of Incorporation, and bylaws. They are very interested in using project-based learning model at the school. The group is working with several sources to seek financing.

## **New York**

### **Oracle Professional Organization**

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**Legal Structure:** Initially, the Oracle Professional Organization will not be a legally-defined entity, although it

may seek legal definition in the future if its members so desire.

**Governing Board:** The Oracle Professional Organization does not legally or functionally operate as an autonomous entity from the school itself. Consequently, the governance structure for Oracle Charter School and Oracle Professional Organization will be the same.

Comprised of teachers and other professional staff, the Oracle Professional Organization will be the school’s main organizational body. The Professional Organization will be led by a teacher-led Management Team, representing the three main constituencies of the school community: a Dean of Students, a Dean of Faculty, and a Financial Director.

The Management Team will be empowered with the authority to administer the school’s programs and will be directly responsible to Oracle Charter School’s Board of Trustees and the school’s charter authorizer, the Charter Schools Institute (CSI) on behalf of the Trustees of the State University of New York.

The Oracle Charter School Board of Trustees is the governing body responsible for oversight of the school’s implementation of the charter and of the school’s progress

The Board will then develop a process for selecting and training new trustees. The board will have seven to nine members—one faculty trustee, one parent trustee, and five to seven other members (a mix of outside educators and business people). At least one member will have arts and education experience and at least one other will be responsible for technology integration.

One member of the Management team will be elected by the charter school’s Board of Trustees to serve as the school’s Lead Teacher. The Lead Teacher will be responsible for making situational or emergency decisions and for acting as the administrative point person for the Board and for the parents.

The Board of Trustees reserves the right to appoint an external administrator as Head of School to replace the Lead Teacher if he or she fails to satisfactorily fulfill administrative duties. In this event, the rest of the management structure would remain intact.

**Site served:** Oracle Charter School

**TPP mission, vision, values:** Oracle Professional Organization has not yet written a mission statement, but plans for the teachers to write one after they are selected.

**Membership Structure:** All full-time faculty and professional staff at Oracle Charter School will automatically be equal members of the Oracle Professional Organization. There will not be any capital requirements for inclusion.

When positions within the school become available, Oracle Charter School’s policy is to publicly post notices of help wanted. Following job posting and a defined period when applications will be accepted, hiring will proceed through a three-step process:

- First, the Department Head<sup>6</sup> of the appropriate department will call prospective applicants for a

**Oracle Professional Organization**  
**Site Profile: Oracle Charter School**

**SPONSOR AND/OR DISTRICT:** State University of New York (SUNY) Trustees

**TPP TO BE ESTABLISHED/SCHOOL TO OPEN:** 2005

**ENROLLMENT (PROJECTED):**

School Year	Grades	Enrollment
2004-05	Planning year	--
2005-06	7-9	180
2006-07	7-10	240
2007-08	7-11	300
2008-09	7-12	360

toward meeting student performance goals. In New York state, all chartered school boards are initially self-selecting with a nominating committee.

<sup>6</sup> Initially, Department Heads will be appointed by the Board of Trustees and/or the Management Team. In year four of the charter, however, when the Oracle Charter School is fully staffed, each department will begin to elect their Department Head by popular vote of the department members. A teacher may serve as Department Head for a period of two years at which time his or her successor is elected. A teacher may serve multiple terms as Department Head. Department Head will not be a position with a stipend.

telephone interview. This interview is broad in scope and will serve to confirm information presented on the applicant's resume.

- Second, following the phone interview, applicants may proceed to a face-to-face interview with a small group of members (two to four) of the appropriate department. Interviewers will rank the prospective candidates and recommend a minimum of two applicants to proceed to the third interview. In the event that there is only one qualified candidate for the second interview committee to recommend, the committee will advance that candidate to the third interview and justify the process to the third interview committee.
- Third, following the first face-to-face interview, ranked applicants will be offered a third interview. This interview will be conducted by a committee comprised of various members of the Oracle Professional Organization including, but not limited to: all members of the applicable department, Dean of Faculty, Dean of Students, Financial Director, and a minimum of two other members of the Oracle Professional Organization. This interview will serve to ensure that the candidate who is ultimately offered a position within the school provides the best available personal and pedagogical fit with the school's mission, vision and governance structure. Final employment is contingent on necessary background and finger printing verifications.

The school's Board of Trustees will ratify hiring decisions before a formal offer of employment is extended.

**Performance measurement and improvement:** A Faculty Review Committee will be responsible for establishing a process for evaluating teachers and carrying out evaluations of all instructional staff on a yearly basis. This committee will be chaired by the Dean of Faculty, and further composed of the Financial Director and volunteer members from the Oracle Professional Organization as well as the Parent Community Organization.

Based on evaluations, which will include peer review, the Dean of Faculty will work with individual teachers to improve performance where needed. The committee will recommend termination of individual teachers to the Lead Teacher based on unacceptable evaluations. The Lead Teacher has final authority over the hiring and firing recommendations of the departments and faculty review committee, respectively.

Oracle Professional Organization intends that the Lead Teacher will support the members' decisions and would not have given the Lead Teacher final authority were it not for a concession it needed to make with the Charter Schools Institute (CSI).

There will also be a committee specifically responsible for professional development. This committee, chaired by the Librarian, is further composed of the Dean of Faculty, Financial Director, and volunteer members from the Oracle Professional Organization. The committee will review and recommend opportunities for school-wide in-servicing related to the school's mission and curriculum. The committee will also approve requests for teachers to receive funding for professional development in the form of conferences, workshops and graduate coursework.

**Compensation:** The school's Finance Committee will be responsible for determining compensation and pay scale. This committee will be chaired by the Financial Director and further composed of members from the Oracle Professional Organization, the Parent Community Organization, and the Board of Trustees. The Finance Committee will put together the school's budget overall and will make decisions regarding the salaries and benefits within the context of the school's income, expenses and needs. The Board of Trustees and the CSI must approve the committee's recommendations.

**Start-up funding:** Oracle Professional Organization has not yet applied for start-up funding. At this point, Oracle Professional Organization has no budget beyond that for the school.

**Sources of revenue:** The ongoing source of revenue for Oracle Professional Organization is the contract between Oracle Charter School and the CSI, which says that Oracle Charter School's funding comes from the state through the Buffalo School District on a per-pupil basis. Additional funding for state programs, such as free and reduced-price lunch and special education, also runs from the state through the Buffalo School District. Since Oracle Professional Organization is not a legal entity, the revenue for the school and the professional organization are considered one and the same.

**Financial management:** The Budget Committee will review budgets, establish budgetary priorities and limits, and ensure the financial stability of the school. The Budget Committee is made up of the Finance Director (who acts like a Chief Financial Officer), other teachers, and one trustee. Oracle Charter School's Board of Trustees, the Parent Community Organization and the Professional Organization must approve the Budget Committee's budget recommendations.

**Liability and business insurance:** Oracle Charter School will purchase liability and business insurance.

**Administration:** Administrative responsibilities within the school will be carried out largely through a committee system. Committees will be comprised of members of the Oracle Professional Organization (e.g. teachers and support staff), parents, and members of the Board of Trustees. Students may also be included on committees when appropriate (e.g. Student Life or Judicial Review). Committee membership will be voluntary. Each teacher will be required to sit on a minimum of two administrative committees.

At least one member of the Management Team will participate in each of the administrative committees. Administrative committees include: Finance Committee, Faculty Review Committee, Academic Affairs Committee, Department Heads Committee, Curriculum Committee, Student Life Committee, Judicial Review Committee, Technology Committee, Arts Integration Committee,

Special Education Committee, Operations Committee, Development Committee, Public Relations Committee, Scheduling Committee, and Professional Development Committee.

Committee recommendations are submitted to the Professional Organization at-large for discussion and approval by consensus. However, recognizing that consensus may not be possible in every situation, the governance by-laws authorize the Management Team and ultimately, the Oracle Charter School Board of Trustees, to make decisions independent of the committee's recommendations.

The Finance Director will handle payroll, records, benefits, purchasing and legal services.

**Long-term goals:** On a yearly basis, Oracle Professional Organization will take on a review process. Teachers will set goals individually. Departments and the faculty as a whole will set goals collectively.

**Learning program:** The Oracle Professional Organization's curriculum will emphasize cross-cultural instruction, arts integration and technology integration. The cooperative will structure the course content so that teachers can reinforce skills and themes across core areas.

## **Wisconsin**

**CONTACT:** John Parr  
E-mail: johnparr@wi.rr.com  
6020 South 25<sup>th</sup> Court  
Milwaukee, WI 53221  
Mobile phone: 414-550-1156

John Parr, a national leader in developing TPPs, is working with groups of Milwaukee Public School teachers who are serious about starting teacher-cooperatives to run small instrumentality charter schools.

The teacher-cooperative run schools would foster many different educational programs for educating students. The cooperatives will be similar to existing cooperatives in Milwaukee, Wisconsin, with some of the schools being operational for the 2005-2006 academic year.

## Operational Teacher Professional Partnerships Serving Private and Independent Schools

The following teacher professional partnerships serve private and independent schools. Education/Evolving learned about these efforts while doing research on TPPs serving K-12 public schools. The British Columbia (BC) Institute for Co-Operative Studies Web site lists these partnerships, which were established between the late 1950s and early 1970s, at: <http://web.uvic.ca/bcics/research/education/index.htm>. The list of partnerships, below, may not be exhaustive.

Education/Evolving did not contact representatives from these partnerships to assemble information as it did with other sections. All information for this section is copied from the school Web sites or the BC Institute Web site, so there is a limited level of detail presented here.

### Synergy School, K-7

1387 Valencia Street  
San Francisco, CA 94110  
415-567-6177  
[admissions@synergyschool.org](mailto:admissions@synergyschool.org)  
[www.synergyschool.org](http://www.synergyschool.org)

Synergy School, founded in 1973, is a vibrant community of 185 students, their families, and over 20 teachers and staff. Synergy's founders were committed to creating a school that thoroughly empowered teachers in every way. Synergy is a true cooperative. All Synergy teachers are co-directors of the school.

All administrators teach part-time and are responsible for the day-to-day operation of the school. They support the growth and development of the teachers and provide important coordination and communication links within the Synergy community. All staff members are responsible for the implementation and development of curriculum, and for long-range planning and direction. The

combining and sharing of staff energies, skills, and resources enhance the strengths and cooperative nature of Synergy.

The mission of Synergy School is to provide a quality education by empowering children to flourish academically, to blossom as individuals, and to become self-confident, creative learners. Evaluation of student progress occurs regularly through discussion, observation, portfolios and testing. Standard grading becomes part of evaluation in the middle school program.

### Bellingham Cooperative School, P-8

2710 McKenzie Avenue  
Bellingham, WA 98225  
360-733-1024  
[ghalford@comcast.net](mailto:ghalford@comcast.net)  
<http://bellinghamcooperativesschool.com/>

Bellingham Cooperative School was founded in 1969 in response to the members of a cooperative nursery school who wished to continue the small, family atmosphere for their children's elementary school years. It was originally started as a multi-stakeholder cooperative. It is now owned by a couple as a nonprofit business, but is run as a teacher cooperative. Parents have a lot of say in how the school is run, but they cannot vote. Staff members make most of the decisions.

Bellingham's school program is flexible and class sizes are kept small so each child can receive individual attention and proceed at his/her own pace. Children interact with each other in mixed-age, ungraded classrooms, much like the old-fashioned one-room schoolhouse. Parental involvement is encouraged. Students may attend part or full-time and may be home schoolers seeking supplementary support.

## **Maybeck High School, 9-12**

**CONTACTS:** Stan Cardinet, President and Founder  
Sarah Herr, Lead Teacher  
2362 Bancroft Way  
Berkeley, California 94704-1604  
510-841-8489  
<http://www.maybeckhs.org/>

Maybeck is a co-educational, teacher-run, independent, college preparatory high school. About 100 students are enrolled in grades 9-12. Of the 13 staff, seven hold advanced degrees; the average tenure is 16 years. Teachers formed a worker cooperative to run the school, and have elected to use democratic decision-making that involves students in determining aspects of the school's program.

Established in 1972, Maybeck is a small community dedicated to learning, where all forms of diversity can flourish amid mutual support, respect, and responsibility. Through small classes, high expectations, academic excellence, and programs outside the school, students prepare for college and acquire the tools to engage actively and creatively in the wider world. The school works to achieve a similar union between the traditional study of academic subject matter and the exploration and appreciation of nature.

## **Walden Center and School, K-6**

2446 McKinley Avenue  
Berkeley, CA 94703  
510-841-7248  
<http://www.walden-school.net>

Walden School is a small school run by a teacher cooperative that was established in 1958 by parents and teachers interested in pacifism and social change. Teachers value students' personal and social growth and artistic expression as much as their academic achievement, and do not use grades for evaluation. The school has a maximum enrollment of 96. The teacher-student ratio varies from 7:1

to 16:1. Teachers, who meet weekly, run the co-operative with help from a business manager. They work together with staff on four committees: Fundraising, Outreach, Community Events, and Earthquake Preparedness.

## Learn More About TPPs: Books and Media Resources

To learn more about the teacher professional partnership idea/innovation, check out the following sources. You might also look up “Teacher Professional Partnerships” on the Education/Evolving Web site:

**www.educationevolving.org.** Click on “New organizational arrangements...” and then on “Teacher professional partnerships...”

## Descriptions of the Innovation: Teachers Professional Partnerships

Dirkswager, Edward J., editor. 2002. *Teachers as Owners: A Key to Revitalizing Public Education*. Lanham, Maryland: Scarecrow Press, Inc.

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Kenney, Jeannine. 2002 (October). “Co-ops Chart New Course for Education.” *Cooperative Business Journal*, 16:3, 12.

Kolderie, Ted. 2004. *Creating the Capacity for Change*. Saint Paul: Education/Evolving. Available online: [www.educationevolving.org](http://www.educationevolving.org)

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Rofes, Eric. 2000. “Teachers As Communitarians: A Charter School Cooperative in Minnesota.” Chapter 7 in *Inside Charter Schools: The Paradox of Radical Decentralization*. Bruce Fuller, ed. Harvard University Press.

Thornton, Karen. 2002 (June 7). “Teachers rule at this school.” *The [London] Times Educational Supplement*, 4483:22-23.

Toch, Thomas. 2003. “Ownership Stakes.” Chapter 5 in *High Schools on a Human Scale: How Small Schools Can Transform American Education*. Boston: Beacon Press.

## Achievements of the Innovation: New Learning Models; New Ways to Think About ‘Teaching’

Drew, Duschesne Paul. 2001 (May 21). “Minnesota New Country School finds niche in unchartered waters.” *Star Tribune*.

Fenske, Bob. 2000 (May 25). “A Love for Learning.” *Mankato Free Press*, 1A-2A.

Friedman, Jenny. 2001 (January/February). “Big Time Learning in a Small Minnesota Town.” *Twin Cities Parent*, 50-51, 62.

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Moyer, Kim. 2001. “Where Technology Use is Second Nature.” *Converge*, 19-22.

Newell, Ron. 2002 (November). “A Different Look at Accountability: The EdVisions Approach.” *Phi Delta Kappan*, 84: 208-211.

Newell, Ron and Irving H. Buchen. 2004 (June). *Democratic Learning and Leading*. Rowman and Littlefield Publishers, Inc.

Souder, William. 2000. *A Plague of Frogs*. Hyperion Press, 2000. \*\*Note: The discovery, by students in an environmental project, of the deformed frogs became a matter of serious interest in the adult scientific community.

Thomas, Doug, Walter Enloe, Ron Newell (eds). *The Coolest School in America: How small learning communities are changing everything*. Lanham Maryland: Scarecrow Press, January 2005.

## **The First Teacher Professional Practice Model: EdVisions Cooperative**

Blair, Julie. 2002 (March 27). "Doing it Their Way: Teachers Make All Decisions at Cooperative Venture." *Education Week*, 21: 1, 14-15.

Hanson, Katherine L. 2001 (January/February). "EdVisions Minnesota Coop Serves Rural Charter Schools." *Rural Cooperatives Magazine*, 27-29.

*\*\*Note: The more recent development of the partnership innovation in its Milwaukee, Wisconsin form seems not to have been studied or written about.*

## **Bill & Melinda Gates Foundation Grant to Replicate the EdVisions Model**

Peirce, Neil. 2001 (September 7). "Mega-Schools Gain a Mega-Adversary." *Washington Post Writers Group*.

Torres, Kristina. 2000 (September 7). "Education innovators get millions: Gates Foundation backs two Minnesota projects." *St. Paul Pioneer Press*, 1A; 8A.

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## ABOUT THE CONCEPT OF AN ‘OPEN SECTOR’ IN EDUCATION

Much of the work being done by Education|Evolving is to help create and sustain an “Open Sector” in public education – in Minnesota and elsewhere in the country. By “Open Sector,” we mean a “space” in public education that is open to new entrants – new schools that are started from scratch by teachers, parents, community organizations and multi-school networks. The “Open Sector” is also open to new authorizers or sponsors – entities other than school districts that oversee schools. The “Open Sector” is open to new learning programs and to new ways of governing and managing schools. And, as part of a broadening definition of public education, the “Open Sector” is open to all students who choose to attend schools in that sector.

The “Open Sector” is based on the premise that we cannot get the degree of change and improvement we need in education by relying only on fixing the schools we now have. And, to get enough new schools that are fundamentally different, we need a combination of public policies and private actions that will allow new schools to emerge and that will create an environment in which they can succeed. This kind of positive environment for creating and sustaining new schools can be established on a state-level through actions led by state policy makers. It can also be done – and is certainly needed – in major urban communities all across America.



Though chartered schools may be the most visible part of the “Open Sector” today, this concept of a positive environment for creating and sustaining successful new schools is not limited to charters. The “Open Sector” can also include schools operating within a district or state on some kind of contract other than a charter – as long as they are truly autonomous, accountable and open to all students who chose them.

There is also no prescribed or uniform learning program presumed by this vision for creating many more schools new. In fact, there’s an urgent need to better understand, respect and address the individual differences in students. It’s likely, however, that successful new schools in the “Open Sector” will be smaller and that they will make it possible for all students to take a more active role in their learning and to develop more direct and nurturing relationships with adults.

## ABOUT THIS REPORT AND ITS AUTHORS

This publication is the second report under an initiative by Education|Evolving designed to encourage teachers, teachers union, district and school leaders, policy leaders, the media and others to rethink some of the underlying premises that have historically defined the teaching profession. For too long, teachers have had no choice but to pursue their profession as employees of schools and districts in a traditional employee-employer relationship. That’s now changing, with several different models emerging for teachers working together in professional practice arrangements – much like attorneys, accountants or architects. This publication includes an inventory of these arrangements as they have appeared in several states, as well as a directory of informational resources and contacts. This information will be regularly updated on E|E’s web site – [www.educationevolving.org](http://www.educationevolving.org)

The bulk of the research and writing for this publication was done by Education|Evolving associate **Kim Farris-Berg**, with guidance and assistance from E|E associates **Ed Dirkswager**, **Joe Graba** and **Ted Kolderie**, who also contributed the report’s context-setting introduction. Research assistance was provided by **Chrissy Lee**, a Carleton College student and E|E intern. Final editing and production supervision was provided by E|E’s coordinator, **Jon Schroeder**.



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