TEXAS EDUCATION REVIEW

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Open Call Articles

Special Issue: *Unveiling the Landscape of School Discipline in the United States:
Opportunities, Innovative Strategies, and Prospects*

TEXAS EDUCATION REVIEW

Welcome to Volume 13, Issue 1 (Winter 2025) of the Texas Education Review (TxEd)

We are pleased to announce the publication of Volume 13, Issue 1 of the Texas Education Review, featuring five open call pieces that explore: new standards on teaching reading in teacher preparation (Lammert & Godfrey), portfolio management models (Francis & Mairaj), the impact of abortion restrictions on medical students (Broaddus et al.), community resistance and political advocacy in the face of state takeover (Skelton), and financial ramifications of state takeover (Fousek et al.).

Additionally, we present a Special Issue titled *Unveiling the Landscape of School Discipline in the United States: Opportunities, Innovative Strategies, and Prospects,* containing six entries and an introductory editorial by our Guest Editors Dr. John A. Williams III and Dr. Kathryn E. Wiley.

Information for Contributors

The Texas Education Review is an independent, peer reviewed, student-run scholarly publication based at the College of Education at The University of Texas at Austin. The Texas Education Review was founded and is operated by doctoral students at The University of Texas at Austin's College of Education, which consistently ranks as one of the best public university graduate education programs in the United States. The Texas Education Review aims to advance scholarship by publishing an academic journal of the highest quality including works by graduate students, professors, and practitioners, focusing on education policy and related issues. This journal features articles, essays, notes, and reviews relevant to a national and international audience of scholars and practitioners.

The Texas Education Review focuses on analysis of education policy and related issues, with nonexclusive preference given to issues affecting the State of Texas. Each issue shall display unparalleled excellence in content and style. Further, The Texas Education Review fosters the academic and professional development of its members through participation in the editorial process and each member displays the highest standards of integrity and professional excellence in every endeavor. From Sweatt v. Painter and No Child Left Behind, to charter schools, curriculum policy, and textbook adoption, the State of Texas has played and will continue to play a critical role in shaping education policy in the United States. The Texas Education Review is located directly on The University of Texas's campus in the heart of downtown Austin. Its close proximity to the Texas Capitol, Texas Education Agency, and State Board of Education offers unparalleled access to the thought leaders, policy makers, and academics who are driving education policy in Texas.

Utilizing Complexity Theory to Examine the Texas Science of Teaching Reading Standards

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Utilizing Complexity Theory to Examine the Texas Science of Teaching Reading Standards

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Abstract

Legislation based on the Science of Reading has spurred changes in teacher preparation and K-12 schools. Texas, a frequent leader in educational policy, adopted its own Science of Teaching Reading (STR) Framework with a focus on scientifically based instructional practices. Adoption of these standards is intended to improve methods of teaching reading within teacher preparation and, by extension, improve reading instruction in schools. To understand how the Texas STR standards defined and related the elements of learning environments, including reading, teaching, and learners, a content analysis of the STR framework informed by complexity theory was conducted. Themes include (A) teaching as adherence to research-based practices, (B) a stand-alone view of reading that minimally attends to writing instruction, (C) a stage-based and simple view of reading, and (D) minimal attention to sociocultural factors. Overall, findings suggest that the STR standards lack specificity, barely mention relevant research, and fail to sufficiently address the role of race, culture, ethnicity and other sociocultural factors in reading instruction. The implications of these drawbacks of the STR standards, especially as they provide guidance to educator preparation programs, are discussed.

Keywords: science of reading, content analysis, complexity theory, initial teacher preparation

Recent debates over the Science of Reading (SOR) have been fueled by state policy, popular media, and reading research. As in previous years, these debates often reduce a vast and complex research base to a conflict between phonics-based methods and/or structured literacy and balanced literacy and/or whole-language approaches (Pearson, 2016; Tierney & Pearson, 2024). Popular media sources (e.g., Hanford, 2018; 2023) describe the SOR as a settled science and suggest that teaching informed by SOR will eliminate the achievement gap in reading. Some researchers question whether SOR-driven instruction offers narrow explanations for reading problems given other influences on educational outcomes, such as sociocultural factors and childhood poverty (Durán & Hikida, 2021; Harrison, 2010). Furthermore, translating reading research into pedagogy is no simple task (Coburn & Woulfin, 2012; Lammert et al., 2022), and research on how to teach reading processes and skills continues to develop (Seidenberg et al., 2020).

A particular challenge has been translating research on reading processes from fields such as psychology and neuroscience into curricular practice and instruction (Seidenberg et al., 2020). To address this need, scholars of implementation science have promoted design-based studies that test reading instructional practices in contextualized settings (Shanahan, 2020). However, different instructional practices can be considered evidence-based depending on which research methods are used, and which theoretical models of reading development drive the research design (Goodwin & Jiménez, 2020; Grote-Garcia & Ortlieb, 2023). Practitioners, such as beginning teachers, are often lost in this gap (Coburn & Woulfin, 2012; Solari et al., 2020).

Despite ongoing debates about how to translate reading research and cognitive science into instructional methods that are effective for students in our diverse contemporary classrooms, legislators are increasingly mandating specific instructional practices for the teaching of reading (Schwartz, 2020). In Texas, a state that is traditionally a forerunner in policy (Cassidy et al., 2016; Worthy et al., 2018), the state legislature voted in support of SOR policies in 2019 and adopted the Science of Teaching Reading (STR) standards for initial teacher preparation and certification in 2020 (Texas Education Agency [TEA], 2022). The STR informs educator preparation programs by defining the components of reading development, instruction, and assessment teachers must master to earn state licensure, and by playing this role, it informs the practices used to teach reading in K-12 classrooms. Given the important role the Texas STR standards play in shaping the practices used in educator preparation programs, we conducted a content analysis (DeJulio et al., 2021) of Texas' STR standards informed by complexity theory (Byrne, 1998; Gear et al., 2018) and focused on three core elements of the STR standards: teaching, reading, and learners.

Theoretical Framework

Complexity theory conceives of systems as holistic entities comprised of dynamic constituent parts. Understanding complex systems, such as classroom environments for teaching reading, requires attention to how these parts interact, develop, change, and evolve across different levels and time (Byrne, 1998; Gear et al., 2018). Change within systems occurs through disequilibrium between system elements and shifts due to self-organization, feedback, and emergence. That is, change in complex systems happens due to unpredictable, dynamic interactions between system elements (e.g., people, organizations, policies). Here, we conceptualize standards such as the STR, which are intended to represent the total of what teachers of reading should know and be able to do, as representing the complex system of reading development. A complexity perspective provides a lens through which to examine how the repeated and/or dominating presence of some elements of the STR standards reduces attention to other elements. Furthermore, conducting content analysis through the lens of complexity theory enables us to uncover the explicit and implicit messages embedded in the STR standards through the topics left minimally mentioned or ignored.

In this way, complexity theory offers an alternative to reductionist perspectives that distill complex phenomena into isolated factors (Byrne, 1998). Isolated knowledge may provide short-term insights into teacher education, but it typically falls short of providing sufficient evidence as to why long-term patterns in learning outcomes persist (Cochran-Smith et al., 2014). In parallel fashion, content analysis can reduce texts to smaller components that lack meaning, suggesting the need for a complexity perspective on content analysis methodology (Yoon et al., 2018). We argue that complexity theory is useful in content analysis because it conceives of systems as holistic units rather than discrete, individual parts (Byrne, 1998). From this perspective, the 'content' of systems such as the STR standards can be understood by examining patterns of interaction between different system elements (Gear et al., 2018). Taken together, a content analysis informed by complexity theory allows for examining messages and discourses across and within a system.

Teaching Reading as a Complex System

Conceptualizing the teaching of reading as a complex system begins with the assumption that teaching reading cannot readily be simplified into linear, manipulable components; instead, teaching and learning rely on understanding the dynamic, changing interactions of teachers and learners with texts as they engage with the reading process (Davis & Sumara, 1997). This is not to suggest that

specific reading skills and processes are unimportant in teaching and learning; however, understanding reading instruction requires attention to the multidimensional and intersecting elements of learning environments needed to support readers (Compton-Lilly et al., 2020). Further, preparing teachers using the STR standards to understand the components of reading in isolation, rather than collectively, may inadequately support educators in navigating situations in real classrooms (Coburn & Woulfin, 2012; Cochran-Smith et al., 2014).

In this study, complexity theory provided a lens to examine Texas' STR standards that went beyond a descriptive explanation of the STR Domains and Competencies to an examination of how elements interact with one another within the standards (Byrne, 1998). We chose this framework knowing that a complex system like reading cannot be fully understood through the identification and labeling of individual elements. Instead, we based our analytic process on the understanding that no single recommendation for reading instruction can come without considering what else might have taken the place of a particular learning practice.

Review of Literature

First, we contextualize the current study by describing the role of standards in initial teacher preparation. Then, we review what is known about the three key learning environment elements underpinning our research questions which are teaching, reading, and learners.

The Role of Standards for Teacher Preparation

The STR framework defines what future teachers must know and be able to do as teachers of reading. TEA describes the standards as informing "proper teaching techniques, strategies, teacher actions, teacher judgments, and decisions" (2022, n.p.) by connecting theory and practice. They have suggested that the adoption of the STR standards will lead to improved teacher preparation and, ultimately, improved reading achievement for K-6 students (TEA, 2022). However, the adoption of the STR standards alone does not ensure that the content of literacy methods courses will change, as teacher educators still control the content of coursework.

In the past several decades, the federal Department of Education has adopted a standards-based accountability approach to K-12 education (DeBray, 2006). With the advent of state SOR standards, this same accountability approach now guides the preparation of K-12 teachers. Currently, the federal government interfaces with accreditation bodies (e.g., National Council for Accreditation of Teacher Education, [NCATE], 2008), and these accreditation bodies interface with teacher education programs to ensure that initial certification programs promote evidence-based practices. Typically, accreditation agencies provide standards for teacher learning but allow program flexibility in developing course sequences to address those standards (Cochran-Smith & Zeichner, 2005). Organizations such as the International Literacy Association (ILA) may also weigh in on their view of teacher education practices for literacy (i.e., ILA, 2018). Research on how closely teacher education course curricula align with teacher preparation standards suggest mixed results. One analysis indicated that standards "enable fairly consistent content delivery in preservice courses" (DeLuca & Bellara, 2013, p. 366). When teacher educators refine coursework to improve its alignment with standards, it often results in improved teacher learning of that content (Purcell & Schmitt, 2023).

In addition to accreditation procedures and research, preservice programs in Texas are monitored for adherence to STR standards through a required certification exam. Teacher preparation programs must demonstrate to TEA that coursework is aligned with STR standards and that teacher candidates across multiple degree plans, including Early Childhood–Grade 6 Generalists, Grades 4–8 English Language Arts and Reading, and Grades 4–8 Social Studies teachers, are assessed on these standards. Some accreditation bodies rely on students' pass rate on certification exams as one measure of program efficacy, and STR is included among those exams (Council for the Accreditation of Educator Preparation, 2022). The combination of these accountability pressures suggests that Texas' STR standards are likely to impact course content in Texas preservice teacher education programs.

Element One: Defining Teaching

In understanding the function of the STR standards, it is important to review what is known about teaching reading. First, the SOR has been the focus of much attention in literacy research (Goodwin & Jiménez, 2020). However, less clarity exists around the Science of *Teaching* Reading (STR). For example, while the ILA maintains a glossary of key terms in literacy research, they define the SOR, but not *STR*. The attention being directed toward SOR/STR debates is "monumental" (Grote-Garcia & Ortlieb, 2023, p. 5); however, there remains a lack of clarity on what teaching practices and methods logically follow from the broad research base within the umbrella of SOR, particularly given disagreements on what constitutes research evidence (Lammert et al., 2022). These challenges are especially important to consider as states write standards for the preparation of reading teachers, which are separate from the standards for teaching reading content.

Prior standards initiatives have typically focused on content standards. For example, the Common Core State Standards (CCSS) dictate what should be taught and how complex texts should be introduced at each grade level, though CCSS do not prescribe specific texts that must be read. Thus, these standards permit teachers to exercise their professional knowledge (Kamil, 2016) within selective areas. Similarly, the STR standards dictate what teachers should know and be able to do to earn state certification as reading teachers. As such, it is unclear how the STR standards translated knowledge of the act of reading development into pedagogical and assessment approaches, particularly given researcher concerns about translating research into science (Solari et al., 2020). To address this, we examined how the STR standards define 'teaching.'

Element Two: Defining Reading

Within literacy research, different models exist to define the reading process. Perhaps the most often referenced model is the Simple View of Reading (Gough & Tunmer, 1986), which examines reading processes in isolation and can serve to disentangle the underlying elements of reading acquisition. Some models, such as Scarbourough's Reading Rope (2001) and Seidenberg et al.'s Four-Part Processor Model (2020) represent cognitive perspectives on reading development, while other models explain how readers acquire word-level decoding knowledge, such as the Four Phases of Word Reading (Ehri, 2020). On the other end of the spectrum are models that consider how literacy, including reading, writing, and oral language, functions as a social practice. One such model is the Four Resources Model (Freebody & Luke, 1990), which suggests that literacy users act as code breakers, text participants, text analysts, and text users as they navigate their worlds. These models all hold value as they differ in how they represent the relationship between word reading and literacy writ large.

Choosing one model to define the STR standards is challenging since each model describes different elements of reading acquisition and/or reading processes. Further, in practice, reading and writing are often combined into a 'literacy block' in elementary reading instruction. Applied research on classroom practice shows that reading and writing are integrated processes best learned together (Graham & Hebert, 2011; Philippakos & Graham, 2022) and prior studies suggest that literacy demands vary depending on the discipline and field in which they are used (Shanahan et al., 2011). This integrative aspect of literacy does not render reading-only models useless, but suggests that in the reality of elementary classrooms, teachers may require additional knowledge to effectively teach both writing and reading. Accordingly, another aim of this study was to examine the model(s) of reading and/or literacy with which the STR standards are aligned.

Element Three: Defining Learners

Finally, when reading research indicates which instructional practices are effective for readers too often there is an implied emphasis on what is effective for developmentally able, English-speaking, monolingual readers. Oftentimes, practices that are effective for most children fail to be equally effective when translated for readers with different backgrounds and identities, such as Emergent Bilinguals or students with reading disabilities (Christ et al., 2018; Snow et al., 2002). In addition, English is a uniquely challenging language to learn given that its quasi-orthographic nature (Share, 2021). Thus, the question of whether individual learners' needs will be met by the practices presented in Texas' STR is essential to consider since Texas is a highly racially, culturally, and linguistically diverse state. The 2020 census showed that during the decade 2010- 2020, Texas gained nearly 11 Latinx residents for every additional white resident, and Houston, Texas, is the most ethnically diverse city in the U.S. (Ura, 2022). In this context, understanding how individual differences and strengths are represented within Texas' STR is essential for the equitable application of the STR to practice. Flowing from these three elements, our research question is as follows: Within Texas' STR standards, how are 'teaching' 'reading' and 'learners' articulated, and what is the relationship between these elements?

Methods

Our overarching methodology was a complexity theory-informed content analysis (DeJulio et al., 2021; Gear et al., 2018; Schreier, 2012) of Texas STR standards documents. When conducting a content analysis, the aim is to honor a document's complexity by seeing "words and texts as viable data sources deserving of analysis," including messages "both standard and hidden" (Thomas & Dyches, 2019, p. 605). Complexity theory (Cochran-Smith et al., 2014) allowed us to consider the interrelatedness of different elements of the STR standards. As we utilized traditional content analysis processes such as documenting which word(s) and phrase(s) were most common, complexity theory also allowed us to critique the architecture of the standards document on the level of headings, subheadings, the examples provided, and the order in which information was presented. Thus, to explain the analytic process we followed, we provide an in-depth description of the data source.

Data Source

We included the full Texas STR standards approved in 2020 as our data source. The STR standards are organized into Domains and Competencies, with further clarification provided through descriptive statements referred to as Descriptors. There are 4 Domains, 13 Competencies, and 147 Descriptors delineating expectations for teaching reading. The full text can be accessed through the TEA website (2024).

Domains

Domains reference the areas of Reading Pedagogy (Domain I [D.I]), Reading Development: Foundational Skills (Domain II [D.II]), Reading Development: Comprehension (Domain III [D.III]), and Analysis and Response (Domain IV [D.IV]). Each domain represents different percentages of the standards. The two largest sections are D.II and D.II, which combined account for 67% of the standards (Figure 1).

Figure 1

STR Domains by Percentage
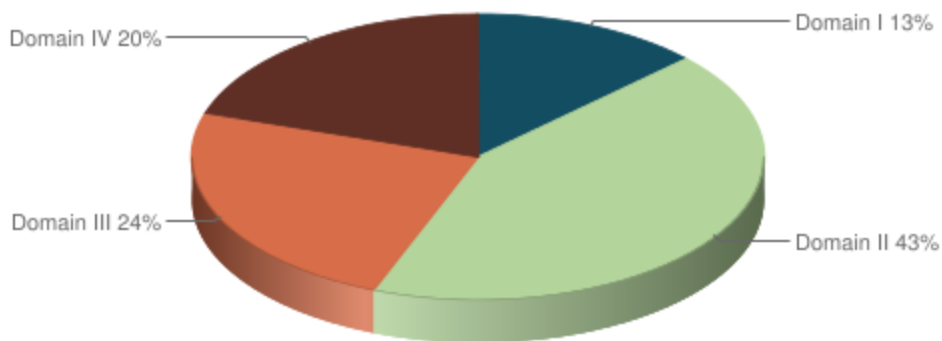
Competencies

Competencies (C) provide greater detail on each Domain and contain the specific topics underpinning reading pedagogy and development that teachers must master. The 4 Domains contain 13 Competencies which include: foundations of the science of teaching reading (C.1), foundations of reading assessment (C.2), oral language foundations of reading (C.3), phonological and phonemic awareness (C.4), print concepts and alphabet knowledge (C.5), phonics and other word identification (C.6), syllabication and morphemic analysis (C.7), reading fluency (C.8), vocabulary development (C.9), comprehension development (C.10), comprehension of literary texts (C.11), comprehension of informational texts (C.12), and analysis and response (C.13).

Descriptors

Descriptors provide greater specificity on these topics and comprise the bulk of the STR standards. A total of 147 Descriptors delineate the expectations on the components mentioned above of

reading, instruction, assessment, and standards-based learning that comprise reading instruction as defined by the state of Texas.

Data Analysis

Our first round of inductive coding (Saldaña, 2013) focused on five a priori codes based on our research questions and informed by complexity theory (Creswell, 2013). We recognized that the STR would, by nature, represent reading, instruction, and learners. Since policymakers presented the standards as a solution to low reading achievement in the state, we also included codes for 'reading assessment' and 'reading difficulties'. In total, the five *a priori* codes applied were: (A) Foundational Knowledge of Reading, including Domains, divisions of skills, and knowledge of reading; (B) Instruction, including pedagogies and methods of teaching; (C) Reading Assessment, including formative and summative assessments and descriptions of how they inform teaching; (D) Reading Difficulties, including characteristics of readers needing intervention; (E) The Learner including sociocultural and cognitive considerations of individuals. Coding examples are provided in Appendix A.

To maintain systematicity, both researchers identified an example of each code and discussed them with one another. After this initial agreement, we separately applied these five codes to the entire corpus of STR standards. Consistent with content analysis procedures (DeJulio et al., 2021), we included the entire document and unitized the text at the level of Descriptors ($n = 147$). However, we adapted traditional content analysis procedures (e.g., Schreier, 2013) by permitting the same descriptors to be coded in multiple categories. Informed by complexity theory, we determined that coding Descriptors into multiple categories allowed us to maintain a sense of the connections between the elements we were exploring (i.e., teaching, reading, and learners) while also providing us with information about the overall saliency of terms and content within the standards. Neither researcher encountered any Descriptors that could not be coded into at least one of the five a priori codes. As other researchers who have used content analysis procedures have noted (e.g., Suico et al., 2023), we found that many of the Descriptors included information that deviated from the categories assigned in the STR standards. For example, some of the Descriptors within C.2, which is focused on reading assessment, also included information on what a teacher could do with assessment results, which was tied to instruction.

Next, we determined the level of reliability of coding between coders. In this analysis, our initial coding process achieved 93.2% Interrater Reliability after first-round coding was conducted separately, and we achieved 97.5% Interrater Reliability after resolving disagreements through discussion.

Moving from first-round codes, we conducted a second round of analytic coding with an enhanced focus on complexity theory. At this stage, we reanalyzed all the Descriptors that fell into each code, as well as their corresponding Competencies and Domains, which signaled their purpose within the document. We analyzed the Descriptors at the level of content units, which we defined as phrases that expressed complete ideas. For example, C.4.B. "Demonstrate ability to accurately interpret the results of ongoing assessments in phonological and phonemic awareness and to use the results to inform instructional planning and delivery, including differentiation strategies and interventions" was broken into two segments: (A) Demonstrate ability to accurately interpret the results of ongoing assessments in phonological and phonemic awareness; (B) use the results to inform instructional planning and delivery, including differentiation strategies and interventions.

Separately, we generated analytic memos for each code. The purpose of the memos were to summarize the overall perspective presented by the sum of the Descriptors, as well as to note organizational features of the standards within (i.e., where examples of particular assessments or content were given and where they were not) and between each code (i.e., which Competency headings came earlier or later inside the document). We also attended to the saliency of Descriptors by noting how often different elements were reflected. For example, in code C: Reading Assessment, we generated a list of 31 different assessment methods mentioned in the STR, and we noted that three (phonics inventories, informal reading inventories, and spelling inventories) were mentioned multiple times.

Each memo was between 1000 and 1500 words in length. We discussed each memo together and then discussed how the memos fit together as a holistic representation of reading instruction. In this discussion, we returned to our research questions and asked how our memos could address the three elements: teaching, reading, and the learner. Through our discussion of the memos, four grounded themes emerged. To ensure that the themes were truly overarching representations of the standards, we did not delineate a grounded theme unless it could be supported by at least two of the five codes.

Findings

Findings are organized around the four analytic themes. These themes are a) teaching as adherence to research-based practices, b) a stand-alone view of reading separate from writing instruction, (C) a stage-based and simple view of reading, and d) minimal attention to sociocultural factors as instructional variables.

'Teaching' as Adherence to Research-Based Practices

Table 1 shows the most common terms used within the STR to describe teaching.

Table 1

Terms used to Describe "Teaching" within the STR

Term	Frequency
Research-based	76
Best Practices	66
Explicit	19
Evidence-based	17
Systematic	5
Sequential	3

All 13 Competencies reference instruction. For each of the Competencies that describe different elements of reading foundational skills and comprehension (C.3-C.12), the standards state that teachers must provide instruction relevant to each reading skill. However, rather than describe these practices, the standards repeat identical phrases for how instruction should work regardless of the skill. For example, the STR standards repeat that teachers must "understand foundational concepts, principles, and best practices related to the development of…" ($n = 10$) each of the ten

competencies that describe different elements of reading foundational skills and comprehension (e.g., fluency, vocabulary, morphological analysis).

The STR describes instruction as standards-based and connects the teaching of reading with state reading standards to define the knowledge and skills in which students must become proficient. Nine of 13 competencies across 15/147 descriptors (10%) reference standards-based instruction, specifically identifying TEKS for English Language Arts and Reading (ELAR) ($n = 15$), PRK-G ($n = 15$), and Texas English Language Proficiency Standards (ELPS) for English learners ($n = 1$). Further 9/10 competencies (C.3-C.9, C.11-C.12) on reading components reference standards-based instruction.

Broadly, the STR standards explain that instruction should be based on state content standards (C.1.B), and content standards should inform teachers by identifying grade-level skills to be assessed (C.2.A). Additionally, competencies (C.3-C.9, C.11-C.12) on reading skills also reference standards in their initial descriptors through the phrase "as described in Texas Prekindergarten Guidelines and the TEKS for ELAR (Kindergarten through Grade 6)" Each competency repeats this phrase and links a specific reading component to state standards. Standards also reference the ELPS for English language learners primarily through C.3 Oral Language, which again described standards-based instruction as the basis for planning "appropriate language and literacy instruction for English learners" (C.3.J). As these examples demonstrate, in this framework, the STR standards inform all aspects of the instructional cycle, including assessment, instruction, and differentiation, and content standards supply the material to be taught, yet neither is fully articulated.

The percentage of Descriptors referencing research or evidence-based practices varies depending on the Competency. The highest is in C.7, Syllabication and Morphemic Analysis, where 7/10 Descriptors (70%) reference research or evidence, and in C.6, Phonics and other Word Identification, where 9/13 Descriptors (69%) reference research or evidence. In contrast, only 7/13 Descriptors (54%) mention research in C.10, Comprehension. Though STR defines instruction as evidence-based, it does not define the terms science, research, or evidence. Beyond noting key findings from the National Reading Panel and the National Literacy Panel on Language Minority Children and Youth in Competency I, no references to research are given.

Descriptors provide further explanation of instruction but often contain limited guidance on what instructional methods constitute research-based, explicit-systematic instruction for different elements of reading. Of the 147 Descriptors, only 20 (5%) provide concrete examples and a clear description of an instructional activity, and the standards do not state why these 20 Descriptors were chosen to include examples. For instance, C.8.G describes best practices for developing reading rate and automaticity to enhance fluency and comprehension. This guidance suggests teachers should engage "students whose decoding skills are not yet automatic in oral reading or whisper reading with teacher monitoring for accuracy and feedback." Here, some guidance is provided to use "oral reading or whisper reading," yet, most Descriptors do not contain examples and carry little specificity. For example, C.6 Phonics and Other Word Identification describe instruction for explicit, systematic phonics instruction as such:

> Demonstrate knowledge of research-based strategies and best practices for delivering explicit, systematic phonics instruction (e.g., short vowels in VC and CVC words; short vowels in CVCC and CCVC words, first with consonant digraphs, then with consonant blends; long-vowel words spelled with silent e [VCe and CVCe]; long-vowel words spelled

with vowel teams [CVVC]; words with an r-controlled vowel [CVrC]; words with vowel teams that are diphthongs; words with consonant trigraphs or complex consonant clusters [CCCVC, CVCCC]). (C.6.E)

Here, the standards describe the sequence of the letter-sound correspondences the students should master (i.e., content), but they do not provide a picture of specific teaching practices to match these skills (i.e., pedagogy). Beyond stating that teachers should have "knowledge of research-based strategies and best practices," no information on what these best practices entail is provided.

In sum, according to the STR standards, teachers must rely on scientifically based instruction driven by content standards, assessment, and explicit research-based instruction. Teachers, according to this complex system of teaching reading, should follow these state standards, as evidenced in C.13 Analysis and Response, to select an "appropriate, effective instructional strategy or intervention" (C.13.F). Specifically, what those research-based strategies are is not described 95% of the time (127 Descriptors).

A Stand-alone View of Reading Separate from Writing Instruction

The standards represent a stand-alone view of reading since they give limited attention to writing. References to writing are rare in the document ($n = 9$), leaving little to be described about the way writing is attended to. Furthermore, the standards describe "reading" ($n = 175$) much more often than "literacy" ($n = 14$). Reading acquisition is described in one Competency as interconnected across listening, speaking, reading, writing, and thinking (C.1.C) and described to include understanding the role of language systems (C.1.Q). In addition, the standards mention that "writing samples" ($n = 2$) and "written responses" ($n = 2$) can be used as assessment data for understanding students' reading comprehension and orthographic knowledge. Besides pointing out the connection between reading and spelling, and the reciprocal nature of decoding and encoding (C.1.E), the standards did not describe writing for other purposes or audiences, ultimately prioritizing reading processes over other areas of literacy.

A Stage-based and Simple View of Reading

The STR standards describe reading acquisition as the incremental and stage-based growth of reading skills. While the notion of an isolated simple view of reading defines the underlying model of reading upon which the STR is based, stage-based models answer the question of how the STR views reading development over time. First, most Descriptors, 116/147 (79%), function to explain the components of reading and reading processes (C.3-C.12). These standards follow a Simple View of Reading (SVR; Gough & Tunmer, 1986) as evidenced by the high-level organization of Domains and Competencies as well as the content of specific Descriptors. Briefly, SVR explains reading as the product of decoding and linguistic comprehension, whereby each is separate a component of reading skill. Similarly, the STR organizes reading skills into two main categories: D.II Reading Development: Foundational Skills (C.3-C.8), and D.III Reading Development: Comprehension (C.9-C.10). D.II explains reading development in foundational skills through 6 Competencies and 70/147 Descriptors (48%), while D.III explains reading development in comprehension through 4 Competencies and 46/147 Descriptors (31%). Since the content is more heavily weighted (48% to 31%) toward reading foundational skills and reading foundational skills are listed before reading comprehension skills, these standards place a greater emphasis on foundational word-level decoding skills over vocabulary and comprehension.

Next, the STR describes reading skills as increasing in difficulty from simple to complex. Organization of Competencies reflects this systematic, sequential perspective beginning with oral language (C.3), moving through word-level, structural understandings (C.3-C.8) to word meanings (C.9), and comprehension skills (C.10-13). Across these Competencies, 83/147 Descriptors (56%) explain the incremental acquisition of skill through terms such as stages (n= 18), continuums (n= 10), levels (n= 29), and appropriately complex (n= 20). Further, literacy instruction for English learners is described as occurring in stages noted as beginning, intermediate, advanced, and high advanced (C.3.J).

Consistent with a model of reading development as progressing sequentially, the STR Competencies describe a progression of improving students' reading comprehension of "appropriately complex texts." Overall, 16/147 Descriptors (10%) describe student reading comprehension through "appropriately complex" (n= 16) texts. The standards state that texts read by students should be appropriately complex to promote comprehension (C.10.G) in both literary (C.11) and informational texts (C.12). The STR standards state that these types of texts should be used during assessments (C.10.A, C.11.A, C.12.A), read aloud (C.10.D, C.11.E, C.12.E), independent reading (C.10.D, C.10.E), reading response (C.10.D), re-reads (C.10.I), and differentiation (C.11.H, C.12.J). Additionally, the use of appropriately complex texts supports the development of background knowledge (C.10.G), meta-cognition (C.10.H), and elements of literary (C.11.F) and informational texts (C.12.G).

According to the STR standards, engagement with appropriately complex texts facilitates comprehension, and students' reading should proceed incrementally using increasingly complex texts (C.10.E). The standards emphasize using appropriately complex texts, yet, a definition of what makes a text "appropriately complex" is never provided, readability formulas are not mentioned, nor is any information provided on how an appropriately complex text might be chosen. The STR states that texts should be evaluated and sequenced for instruction "according to text complexity (e.g., quantitative dimensions, qualitative dimensions, reader and task variables)" (C.11.E). Likewise, appropriately complex texts should be used to promote student knowledge of literary (C.11.G) and informational texts (C.12.H) across all comprehension levels, including literal, inferential, and evaluative. These standards present reading and text selection as incremental and stage-like, yet do little to define how appropriate text complexity changes across the reading development continuum.

Minimal Attention to Sociocultural Factors as Instructional Variables

In the STR standards, 9 Competencies (C.1-C.6, C.9-C.11) across 20/147 (14%) Descriptors reference the individual and/or culture as factors that inform reading development and instruction. For example, C.1.J notes the importance of "using an assets-based approach when acquiring, analyzing, and using background information about students (e.g., familial, cultural, educational, socioeconomic, linguistic, and developmental characteristics) to inform instructional planning." This Competency, and others like it, focus on understanding how sociocultural factors contribute to reading instruction and development, however terms such as "cultural" are not defined. The STR standards do not include the terms "race," "ethnicity," "religion," or "gender."

Of the 20/147 Descriptors (14%) that focus on sociocultural knowledge, 13/147 Descriptors (9%) reference students' homes, families, and language(s) broadly, while 7/147 Descriptors (5%) specifically reference culture and/or culturally relevant instruction. Within the Descriptors that

broadly reference the individual through family and background information, the STR standards state that teachers should use asset-based approaches when using student background to inform instruction (C.1.J), understand that families provide a critical role in reading development (C.1.P) specifically in the areas of oral language (C.3.G) and vocabulary development (C.9.E). Additionally, 5/147 (3%) note the importance of English learners' home language to instruction as asset-based, foundational to second-language acquisition, and potentially containing different language elements that may require extra support. The 7/147 Descriptors (5%) that reference "culture" and/or "culturally relevant instruction" focus on articulating what instructional practices are supportive of diverse learners. One Descriptor, C.1.I, specifically provides the example that "call-and-response strategies" are "culturally responsive" but fails to state which culture(s) this practice is responsive toward, leaving the recommendation unclear. Other Descriptors referencing culture emphasize oral language development for English learners (C.3.K). Standards also state that texts should represent diverse cultures in both assessment (C.2.D) and instruction (C.10.L, C.11.E). Further, culture is noted as a factor of instruction for oral language development (C.3.D) and vocabulary instruction (C.9.E). In these Descriptors, no specific examples of instructional practice are provided. In essence, these Descriptors minimize complex sociocultural perspectives on literacy to factors of reading instruction and skill acquisition.

Discussion

This content analysis study examined how three key elements of literacy instruction— teaching, reading, and learners— are articulated inside Texas' STR standards. Drawing on our complexity theory informed analysis of the STR standard document, we uncovered that STR only thinly engages with relevant research, largely ignores the relationship between reading and writing development, is rooted in a stage-based and simple view of reading, and minimally attends to the role of sociocultural factors in reading instruction. As a result, the STR standards leave many important questions unanswered. Since the STR has the potential to define the norms of preservice teacher preparation in reading, the strengths and drawbacks of the way the STR defines 'teaching', 'reading', and 'learners' merit further discussion.

Defining Teaching

A key message in the STR standards is that the teaching of reading must be based on research-based methods. The notion that research should inform practice is far from novel or scandalous. However, these recommendations lack specificity which creates the potential for teacher educators to claim that any practice they would like to promote has some amount of evidence behind it, as has sometimes been the case (Lammert et al., 2022). Since the phrase SOR has become part of the debates around teaching reading, individuals have used it to refer to various research practices while ignoring others (Tierney & Pearson, 2024). Based on our analysis, we do not believe that the Texas STR standards will resolve this problematic status quo given their lack of references to empirical research. It is also notable that the Descriptors focused on areas such as syllabication, morphemic analysis, and phonics, include a greater proportion of references to "research-based" teaching than areas such as comprehension. Perhaps, consistent with popular media reports (e.g., Hanford, 2018), policymakers perceived that these areas of reading instruction are particularly prone to be taught in ways that deviate from evidence-based practice. However, while they seem to suggest this has occurred, the STR standards fail to provide teachers with additional guidance.

Regarding which research should be followed, the standards specifically mention the National Reading Panel Report and the National Literacy Panel on Language Minority Children and Youth, both of which synthesize many important studies. As syntheses, both documents are positioned to represent the complexity of the SOR research base. However, both reports are oriented toward experimental research and away from design methods of study (Pearson, 2016), leaving gaps in their translation to practice (Coburn & Woulfin, 2012). Further, both are dated, with the National Reading Panel Report being nearly 25 years old and failing to capture much recent research. Many questions remain on how best to teach reading. In cases where research is scant, teachers are left with little guidance and support for their own judgment-making. In this void, one possibility is that Texas teacher educators can capitalize on the ambiguity of these standards to thoughtfully and professionally incorporate research-based practices for teaching reading as they have when faced with similar mandates in the past (Worthy et al., 2018).

Defining Reading

In the STR standards, reading is synonymous with efficient and accurate decoding, and a Simple View of Reading (Gough & Tunmer, 1986) dominates. The STR standards rely heavily on incremental models that assume a sequential process of development will be able to describe every learner's journey. Reading development does occur across predictable stages for many students, and knowledge of these stages is beneficial for new teachers. Although stage models have also been critiqued for their inability to permit accelerated learning moments and their tendency to be used to hold students back from dynamic experiences (Rogoff et al., 1995), the SVR has been well substantiated in research. Thus, while the model that the STR is aligned to is sufficient for explaining word solving and decoding, it does not fully address questions of how literacy functions as a contextually embedded social practice.

Relatedly, the standards fail to capitalize on the value of combining writing and reading instruction to make both more powerful (Philippakos & Graham, 2022). It may seem unfair to issue this critique of standards that are, by their very name, focused on reading. However, through a complexity lens (Byrne, 1998) and given the urgency of increasing students' reading achievement and the benefits of integrating reading and writing instruction, it is disappointing that the STR standards function as stand-alone reading standards.

Defining the Learner

The STR standards also suggest that individual differences between learners have minimal relevance on decisions about teaching and reading, given that so few Descriptors engage with this topic. Fully 86% of the standards are silent on the relevance of sociocultural factors, and nowhere do the standards mention race, ethnicity, religion, or gender. Within the standards, sociocultural factors are sometimes described as assets, but more often, are mentioned as elements that change and/or increase the difficulty of providing appropriate reading instruction. In addition, just one example of practice that represents culturally responsive teaching is provided, and it is "call-and-response strategies." The standards fail to state which culture(s) this practice is responsive toward, which paradoxically reifies the notion that teaching lacks complexity (Byrne, 1988) and a standardized set of practices will fit all diverse learners' needs. This runs in contradiction to the very notion of culturally responsive teaching itself. As a result, the Texas STR standards have the potential to support preservice teacher education that minimally attends to the importance of sociocultural factors, if at all.

Limitations

The standards examined in this research apply only to the state of Texas. Texas has long been an influential policy state; however, the nuances between the different state standards require further analysis. In this case, by using a complexity theory perspective, we attempted to avoid a reductionist approach to content analysis that would avoid engaging with these nuances. Furthermore, understanding how the implementation of the standards varies by Education Preparation Program and how these variations impact practice falls outside the scope of this content analysis. This is important work for future study.

Conclusions

Texas STR standards are valuable in their focus on deepening teachers' knowledge of reading development and cognitive theory. The uptake of the standards has the potential to highlight the depth of knowledge achieved by well-prepared teachers of reading and the importance of teacher educators' knowledge of research on reading acquisition. However, in key places, Texas' STR poorly defines several elements of teaching reading by intimating them in overly prescriptive terms yet remaining silent on specifics. As such, the standards fall short of delivering on the promise of utilizing the newest and most compelling research evidence in the field of reading research. Some of the silences in the STR standards suggest room for professional autonomy. For example, specific assessments (e.g., Dynamic Indicators of Basic Early Literacy Skills [DIBELS]) are not mentioned, but the use of assessments that correspond to these goals are described (e.g., nonsense word recognition). This could be interpreted as signaling trust in teacher educators and teachers to select assessments that fit their instructional goals and contexts. However, given the lack of connection to relevant research, the lack of specificity, the utilization of reductionist models of literacy acquisition, and the avoidance of meaningfully discussing writing, the STR standards have far to go to reflect the complexity of the professional knowledge needed to effectively teach all children to read.

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From Theory to Practice:
Logic Models for Evaluating Portfolio School Districts

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From Theory to Practice: Logic Models for Evaluating Portfolio School Districts

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Abstract

Senate Bill (SB) 1882 partnerships, codified into Texas state law in 2017, are the latest iteration of portfolio management models (PMMs) in elementary and secondary education. PMMs aim to overhaul the current governance structure of public education, granting autonomy over critical areas of school operations to school operators, while using the power of the school district to keep operators accountable for achieving results. To date, evaluations of PMMs are rare and limited. Focusing on SB 1882 partnerships, this paper proposes a general logic model for education policy that can be used to evaluate SB 1882 partnerships in a diversity of Texas school districts and customized for other PMMs within and outside the state. Using such a logic model offers researchers, evaluators, and practitioners the opportunity to explicitly identify and test the assumptions and theory of change underlying PMMs and link them to the planned work, intended results, and outcomes attained.

Keywords: Portfolio management models, logic model, evaluation

Program evaluation is a key component in the implementation of public policies and programs, involving the use of research methods to systematically investigate the effectiveness of policies, programs, and initiatives to inform future actions, including program improvement (Holden & Zimmerman, 2009). Broadly, evaluations serve as a tool for determining program effectiveness, diagnosing ineffective or unsuccessful program elements, and enhancing organizational efficiency by providing guidance on where administrators should focus their resources and efforts (Jason, 2008). To support program evaluation, public administrators and educational practitioners and researchers might turn to logic models—visual aids or maps that connect the assessment of program outcomes to the broader mission, assumption, and theory of change (Chen, 2011; W. K. Kellogg Foundation, 2004). Logic models are thus particularly useful when evaluating educational programs, which are often designed around a set of assumptions and theories aligned to particular belief systems (Coldwell & Maxwell, 2018).

This paper focuses on building a logic model for the evaluation of Texas Senate Bill (SB) 1882 partnerships. In 2017, the state of Texas passed SB 1882, codifying into law a relatively new educational governance model known as a "portfolio management model" (PMM). Introduced in the late 1990s, PMMs shift from centralized oversight of schools by traditional school district to a more decentralized approach, wherein districts can use contracting and other means to provide schools through a variety of governing arrangements (Hill 1995; Torres et al. 2020). This can include schools operating with traditional direct district oversight, semi-autonomous to fully autonomous schools created by the district (e.g., magnet schools), privately managed schools, and charter schools (Bulkley and Henig 2015; Marsh et al. 2021; Torres et al. 2020). States and districts adopting PMMs simultaneously introduce a set of complementary policy mechanisms, such as increased school-based autonomy, accountability, school choice, and expansive contracting of new school operators and other service providers (Bulkley and Henig 2015; Marsh et al. 2021).

To date, most PMMs have appeared in large, urban school districts and, for the most part, these districts have undertaken the move to PMMs on their own accords (e.g., New York and Chicago). Only a few districts have been forced to enact a diverse-provider model following state takeovers (e.g., New Orleans, Philadelphia – see Bulkley et al. 2010; Peterson 2021). Rarer still are state-led initiatives like Texas's, where the state encourages the uptake of PMMs across multiple kinds of districts through the passage of school choice legislation. The overall rarity of PMMs means that evaluations are few and, to our knowledge at the time of this writing, none have focused on statewide initiatives like Texas.

With this in mind, this paper builds on initial research conducted by the University of Houston Education Research Center on behalf of Empower Schools, a non-profit that works with school districts and operating partners (OPs) to support SB 1882 partnership implementation (see Templeton et al., 2022), to develop a logic model to evaluate portfolio management models (PMMs). We build our logic model using Texas's SB 1882 partnerships for two reasons. First, it allows us to showcase a practical application of a logic model for PMM evaluation. Second, with many of the initial partnership agreements ending, there is utility in providing the field with an evaluative framework that can help inform the next iteration of partnerships in Texas. To build our logic model, we conduct a qualitative content analysis using select SB 1882 partnership contracts (Appendix A). This paper aims to make three contributions to the literature on logic models and PMMs: 1) demonstrate the application of a general theory logic model for educational interventions for researchers and practitioners; 2) offer Texas school district administrators, researchers, and third-party evaluators engaged in evaluating SB 1882 partnerships a framework for monitoring and evaluation; and 3) provide an example of a logic model that researchers and evaluators examining PMMs might use to build on the limited literature currently available.

Portfolio Management Models and SB 1882 Partnerships

Hill and colleagues are credited with introducing the idea of PMMs in education reform. They explain that a portfolio school district provides schools through many different avenues, "traditional direct operation, semi-autonomous schools created by the district, and chartering or contracting to independent parties," while holding all schools accountable for performance (Hill et al., 2009, p. 1). To do so, PMMs overhaul the traditional governance structure of public education by granting autonomy to schools some areas of school operations and freeing them from certain rules and regulations, and relying on the central office to enforce accountability (Hill et al., 1997; Hill et al., 2009; Marsh et al., 2021).

To formalize the division of autonomy, power, and control over school operations, PMMs rely on contracting. In contracting, governments purchase goods and services, including the delivery and management of government services (O'Toole & Meier, 2004). In the case of PMMs, contracting is used to engage private providers in the provision of public education, while ensuring school districts possess authority to close or replace schools that do not deliver contracted services and results (Hill et al. 1997; Hill 1995). In other words, contracting is the vehicle through which PMMs can balance accountability and autonomy and potentially reinvent district governance.

The recent emergence of PMMs as an educational reform strategy means that the empirical literature on them is limited (Torres et al. 2020; Bulkley et al. 2010; Marsh et al. 2012). Studies aiming to draw causal conclusions about the impact of PMMs on student outcomes have been limited, offering at

best mixed results (e.g., Kemple, 2011; Strunk et al., 2016); McEachin et al., 2016). These studies suggests that PMMs, by creating a patchwork of school types, operators, networks, reforms, and implementation periods, also yield a patchwork of results dependent on the conditions under which the reforms are implemented. Generalizations about the effectiveness and efficacy of PMMs without a proper accounting of contextual factors are inappropriate and miss the subtleties that account for nontrivial differences in outcomes. Theory-driven logic models that explicitly link the underlying assumptions and theory of change to the inputs, actions, outputs, and outcomes of programs can support evaluators and researchers in connecting those contextual factors to the outcomes observed.

Outside of Indiana and Texas, cases of statewide initiatives that have tried to foster PMMs across different types of school districts— for example, rural, suburban, and urban, low to high income— are virtually nonexistent (The Mind Trust, 2024; Texas Partnerships, n.d.). We focus in this paper on Texas as the implementation of PMMs is more expansive than Indiana, with over 80 active partnerships in 2024 (Texas Education Agency, n.d.). In 2017, the 85th legislative session in Texas passed SB 1882 to promote collaboration between public school districts and charter schools. This legislation introduced the Texas Partnerships initiative, through which school districts could contract with non-profit providers, institutions of higher education, and government agencies to operate new charter schools within districts, essentially opening the door for the expansion of PMMs statewide (Senate Research Center, 2017; Texas Partnerships, n.d.). Partnerships fall under two categories:

- Innovation Partnerships, wherein a district contracts with an OP to launch a new campus or to innovate at and improve a school that was rated acceptable (A B, C, or D) by the state for the prior academic year.
- Turnaround Partnerships, wherein a district contracts with an OP to improve a school that received an F (unacceptable) rating the year prior (Texas Partnerships, n.d.).

Performance contracts between school districts and operators are critical to SB 1882 partnerships. Contracts formalize partnerships and, subsequently, play an essential function in structuring implementation by: clarifying roles and responsibilities of each party; delegating authority, power, and resources to different parties; and outlining activities the district and operating partners (OPs) are expected to fulfill. This includes districts devolving power to OPs over the academic model, staffing, budgeting, and the school calendar – all areas critical to site-based management (Wohlstetter & McCurdy, 1991, p. 393). Most important, performance contracts set expectations with respect to the outputs and outcomes the OP will achieve, as well as the metrics determining how the outcomes will be monitored and assessed. Overall, performance contracts lay the foundation for establishing the rationale for partnerships, the actions to be assumed by different parties, and the outcomes by which partnerships will be evaluated.

The introduction of a logic model by which to evaluate SB 1882 partnerships is most timely. Namely, many contracts launched since the 2018 inaugural year will reach the end of their initial term in the 2023-24 and 2024-25 school years. At this point, districts may choose to amend, renew, or terminate agreements. It is reasonable to assume that the state, districts, OPs, and/or third parties providing additional services to districts and OPs may undertake evaluations of the partnerships to inform these actions. Capturing the logic models undergirding these partnerships directly supports formal and informal evaluations of partnerships, making explicit the premises upon which these agreements were entered, how they were intended to work, and what they were supposed to achieve for students and schools.

Specifically, the logic model here is designed to support evaluations of partnerships as an intervention to improve low—performing schools and/or evolve high performing district schools through 1) launching new schools of choice and 2) shifting school districts away from traditional governance towards a PMM. Conducting evaluations based on these logic models can ultimately help assess whether the SB 1882 policy itself achieved its stated goals--that school choice and extensive decentralization of autonomy, authority, and power to contracted operating partners would benefit students—and the circumstances under which those goals were or were not achieved.

Program Evaluation Through Logic Models

Social programs, including education policies and programs, are driven by theories about how and why they will work to achieve their goals (Weiss, 1995). Theories are often implicit, undergirding decision-making with respect to the activities, distribution of resources, indicators of success, and goals to be achieved without being specifically named. The lack of explicit identification of program theory in standard evaluation models can lead to errors and limitations in program evaluation. For example, lack of explicit theory identification can contribute to overemphasis on quantitative measurement of available outcome indicators. This in turn can lead to missing the complexity of initiatives and failing to provide the depth of knowledge and insight needed to understand how programs function and whether theories hold (Weiss, 1995; Meyer et al., 2022).

Theory-based program evaluation offers the opportunity to make the implicit explicit, linking theoretical ideas together to explain the assumptions undergirding programs (W. K. Kellogg Foundation, 2004). Understanding not only what programs intend to achieve but how and why they intend to achieve it is necessary to understanding how programs function, where they succeed and struggle, and if and which theories hold based on the evidence collected as part of the program evaluation (Weiss, 1995; Weiss, 1998; W. K. Kellogg Foundation, 2004). To implement theory-based program evaluation, we mirror the work of Thelen-Creps and Lindle (2022) and utilize a general logic model for education policy (Table 1). A logic model is "a visual representation of the assumptions and theory of action that underlie the structure" of a policy, program, initiative, or intervention (Kekahio et al., 2014, p. 1). Logic models have been used to evaluate different kinds of policies and programs in education, such as early education programs for children with disabilities (Clapham et al., 2016); teacher education (Newton et al., 2013); and selection, design, and implementation of school leadership programs (Daugherty, Herman & Unlu, 2017).

Logic models clearly delineate relationships between outcomes (short- and long-term) with the policy or program's theoretical assumptions and principles and its activities and processes. This is particularly important as effective evaluation and successful policies and programs require clear identification of assumptions and expectations, and why and how a policy or program will efficiently and effectively use resources to address a problem. Given this, in our application, we identify all components of the general theory logic model. Thus, it is useful to define all parts in detail as they informed the early, deductive application of our coding protocol.

Figure 1

General Theory Logic Model from the Bottom-Up
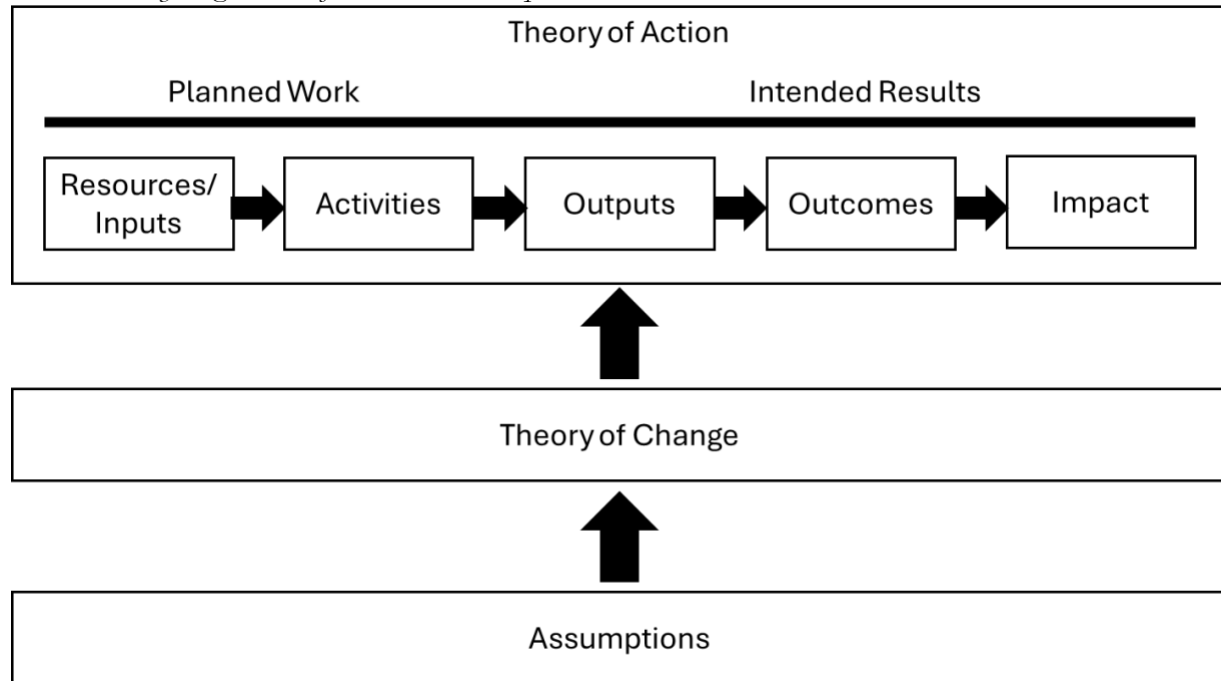
Table 1

General Theory Logic Model for Educational Interventions

Component	General Descriptions
Assumptions	What does the program assume before it is even implemented?
Theory of change/ theory of action	How does the program envision problems, solutions, and equity?
Inputs	Comprehensively, what resources are required for success?
Activities	What is the program's plan of action?
Results	What outputs, outcomes, and impacts should we expect to see?

Note. Adapted from Thelen-Creps & Lindle, 2022, p. 2

Assumptions

Figure 1 illustrates our conceptualization of the general theory logic model. The first component – assumptions – can be divided into two varieties, descriptive and prescriptive assumptions.

Descriptive assumptions address the causal processes intended to cause a social problem and the solutions to address it (Chen, 2011). They are critical as their validity, both contextually and logically, dictates the effectiveness of the program, policy, or intervention. Prescriptive assumptions are those assumptions that dictate the design of a program, policy, or intervention. Once a change model is developed, prescriptive assumptions determine the components and activities to implement the program (Chen, 2011). In other words, prescriptive assumptions direct the design of an intervention and program, determining the means of implementing the intervention so that the processes outlined in the theory of change can unfold.

Theory of Change

A theory of change is a tool for designing solutions to complex social problems. It explains how a set of early and intermediate achievements lays the foundation for producing long-term results (Anderson, 2005). In addition, it offers an approach for making underlying assumptions in a change project explicit and uses the identified desired outcomes of the policy or program to guide planning, implementation, and evaluation (Reinholz & Andrews, 2020). The goal of the theory of change is to help project leaders and evaluators develop an understanding of under what conditions a policy or program might work and for whom. A theory of change may be considered a series of working hypotheses about how change will occur and the desired outcomes attained, and subsequently subject to revision as data is gathered and analyzed to determine effectiveness (Reinholz & Andrews, 2020).

Theory of Action

The remaining components of the general theory logic model comprise the theory of action. A theory of action outlines how a "program's resources, activities, and outputs lead to desired outcomes" (Kekahio et al., 2014, p. 3). Informed by theory of change, a theory of action links outcomes with the policy or program's theoretical assumptions, principles, activities, and processes. Where a theory of change determines how a team believes a policy or program will achieve its goals based on a set of theories and assumptions, a theory of action visualizes how those goals will be attained, based on program resources and activities, as well as their alignment with outputs, outcomes, and impacts.

Figure 2 showcases the elements comprising the theory of action of a logic model, divided into two parts with five total components.

Planned work elements

Resources/inputs. The first part consists of planned work elements, including resources/inputs and activities. Resources/inputs are the raw materials needed to implement the activities and attain desired outputs, outcomes, and impact. These include both material resources/inputs, like curricula, instructional materials, human capital, facilities, and funding, and nonmaterial items, such as time, and knowledge and skills, and support from the community and stakeholders (Kekahio et al., 2014; W.K. Kellogg Foundation, 2004). They might also include the tools, techniques, and technologies of the planned program, as well as encompass products to be obtained and employed (e.g., educational or instructional materials), services to be engaged (e.g., education or professional development, or counseling), and infrastructure to be created and deployed (e.g., organizational structures, relationships, and capacity) (W.K. Kellogg Foundation, 2004).

Importantly, there is some overlap between resources and inputs. Specifically, there may be products, services, or infrastructure that need to first be developed or acquired for other activities to be undertaken. For example, it may be necessary to hire a professional learning specialist before a set of instructional materials can be procured or developed that would serve as an input to a future teacher training program.

Activities. Activities encompass the next part of planned work. Activities include actions, processes, and events that a program or policy will enact and accomplish, should the designated resources and inputs be available (Kekahio et al., 2014). Importantly, there is some overlap between resources and inputs. Specifically, there may be products, services, or infrastructure that need to first be developed or acquired for other activities to be undertaken.

Intended results

Outputs. The second part of the theory of action is "intended results," which is comprised of outputs, outcomes, and impact. Outputs are the result of activities and are typically characterized in terms of the number, size, or scope of the product or service. Critically, outputs provide information on the completion of activities, but they do not indicate whether a change in behaviors, attitudes, knowledge, skills, capacities, or beliefs has occurred.

Outcomes. Where outputs are best understood as the tangible work products resulting from actions, outcomes provide information on the specific changes in behaviors, attitudes, beliefs, knowledge, skills, or status that result from actions. They may also reflect quick adjustments in organizational practices or system designs. Depending on the timeframe of the program or policy, outcomes might be considered short-term, occurring within one to three years, or long-term achievements, attained within four to six years (W.K. Kellogg Foundation, 2004). Often, it is useful to consider short and long-term outcomes, with short-term outcomes offering the opportunity to assess the degree to which an organization is on track to attain its long-term goals.

Impact. Finally, impacts are the longer term organizational, community, or systems level changes that should result from the completion of the activities and the attainment of the outputs and outcomes. This may include improvement in conditions or capacities, or alterations in policy, with a view of such changes occurring in the longer term, such as seven to ten years (W.K. Kellogg Foundation, 2004).

Figure 2

The Components of the Logic Model

Planned Work — **Intended Results**

1 Resources/Inputs	2 Activities	3 Outputs	4 Outcomes	5 Impact
What resources, actors, and conditions are needed to implement your policy or program?	Using the resources & inputs, what are the steps you will take to implement your policy or program?	Should you accomplish the activities, how much of a product or service will the program or policy deliver?	Should you accomplish the activities, how will participants benefit in the short to long term? May include changes in attitudes, beliefs, and skills.	Should participants experience the outcomes, what changes in organizations, communities, or systems may occur?

Note. Adapted from W.K. Kellogg Foundation (2004)

Data & Methods

Data for this study consisted of the performance contracts between OPs and school districts engaging in SB 1882 partnerships. Sixty-seven contracts were obtained from the Texas Education Agency (TEA) via a Public Information Request and three secured via a Google search. Fourteen contracts covering 35 of 103 partnerships were coded (See Appendix A for a complete list of contracts analyzed). Contracts were chosen at random for coding. A limited number were coded due to the high degree of consistency across contracts due to the use of a state-provided contract template and performance contract evaluation rubric, which led us to determine that a subset of contracts would yield generalizable insights.

Qualitative document analysis (QDA) was applied to elicit meaning, gain understanding, and develop empirical knowledge from the official documents (Bowen, 2009). QDA shifts the focus away from numerical relationships between two or more variables characterized by frequencies—a hallmark of traditional quantitative content analysis—to thematic emphasis and communication patterns and discourse (Altheide et al., 2008). QDA granted flexibility in discovery and comparison, meaning we were better able to examine the context in which codes were applied in each contract rather than focus on how often a code was used. This lent itself to identifying patterns, trends, and meaning in the contracts between the school districts and operating partners. We applied a deductive coding approach using codes derived from the logic model framework (Figure 1; Linneberg & Korsgaard, 2019).

To promote interrater reliability, one contract was selected for coding by both authors. Applications of codes were compared along with observations to ensure relevance and validity of the coding. Codes included "assumption," "input," "activities," "outcomes," and others derived from the logic model framework. In addition, we took notes alongside our coding to give more context. For example, the code of "input" may be followed with a description, such "input – Board of Directors," "input – authority over hiring," and "input – financial resources." Given the limited number of contracts coded, we engaged in regular discussion throughout the coding process, reviewing some contracts together to norm application of codes as new information was uncovered in the documents.

SB 1882 Partnership Logic Model

The logic model approach elucidates the vision, purposes, and processes behind SB 1882 partnerships. Understanding how the contracts explain the goals of partnerships, divide responsibilities, and assign authority over critical aspects of school administration and operations fosters the ability to better evaluate partnerships and elements that may be enabling or constraining success. Table 2 outlines the logic model that undergirds SB 1882 partnerships. In the rest of the section, we map our findings to each part of the logic model.

Table 2

SB 1882 Partnerships Logic Model at the District-Level

Component	Legislation description
Assumptions	Students benefit most when decisions concerning educational programs, operations, and student services are made at the school level.
	Districts should only serve a coordinating function, providing services best delivered at scale and ensuring compliance with state and federal laws.
	Autonomy and accountability are reinforcing principles: a higher level of autonomy can be granted and will support schools to make better decision when paired with high levels of accountability.
	With higher autonomy and accountability, schools will achieve improved student outcomes.
Theory of change/ theory of action	By allowing districts to partner with outside organizations (e.g., non-profit organizations, institutes of higher education, other government entities) to operate schools, exempting organizations from requirements of traditional district schools, granting extensive autonomy over decision-making at the school site, and following up with accountability requirements, schools operationally and academically improve, yielding improvement in student outcomes.
Inputs	School operators require extensive autonomy over multiple areas of school life, including implementation of the academic model, selection of curriculum and instructional materials, and the hiring and termination of staff. Additional funding from the state is needed to operate.
	District resources, including facilities and furniture, technological infrastructure, insurance, financial accounting, data collection and evaluation tools, enrollment systems, food services, and transportation, are needed to operate schools.

Table 2

SB 1882 Partnerships Logic Model at the District-Level

Component	Legislation description
Activities	OPs are responsible for numerous activities, including forming and operating a governing board; selecting and implementing an academic model, including curriculum and instructional materials, recruiting students and staff, appointing staff (e.g., school leaders, teachers, support staff), raising funds from private sources, setting and publishing a school calendar, maintaining a balance budget and completing and filing financial audits, sharing data on students with the district.
	Districts are responsible for numerous activities, including: providing a range of support services; hiring support staff; running criminal background checks; developing a School Performance Framework and other accountability tools; monitoring the performance of schools; sharing data and collaborating in record keeping, and running a centralized enrollment process.
Results	Outcomes include academic excellence, measured by indicators campus overall rating, student achievement, progress on standardized testing, closing achievement gaps, and financial health.

Assumptions of SB 1882 Partnerships. SB 1882 partnerships usher into districts a PMM. PMMs, like many decentralization movements in education (e.g., school-based management approaches, school choice), assume that schools are better positioned than districts to make the best decisions for student success and should be given wide discretion over educational programs, operations, hiring and termination of staff, and student services (Hill et al., 1997; Mayer et al., 2013). This autonomy should be held in check by tough accountability mechanisms, which should be the responsibility of the district (Hill et al., 1997). The contracts conform to this logic, as evidenced by this statement found in nearly all coded contracts:
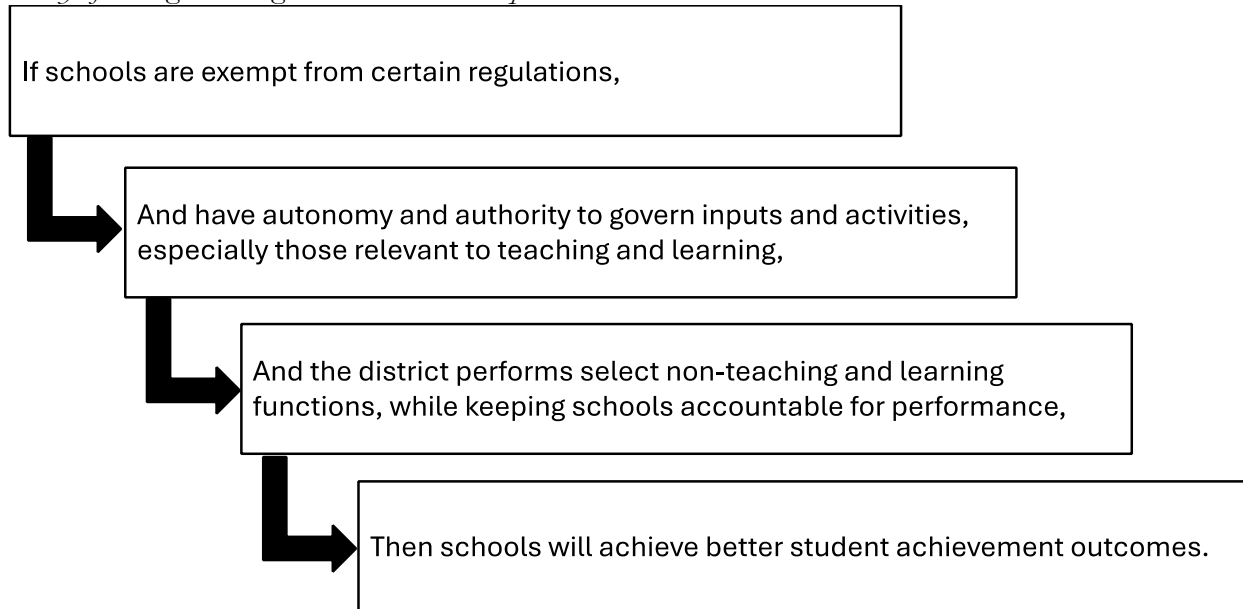
> Premise of Agreement. The Agreement is predicated on an understanding that students benefit when decisions regarding educational programs, operations, and students services are made at the campus level and that autonomy and accountability are mutually reinforcing principles.

Contracts additionally suggest that districts should only coordinate those services that might be too costly or burdensome for schools to individually contract (e.g., food services, transportation, or hiring non-instructional support staff), or activities related to compliance with state and federal laws.

Notably, belief that accountability and autonomy are reinforcing principles is enshrined within contracts. With the threat of accountability mechanisms (e.g., contract termination for OPs; state takeover of the school district for district administrators), a higher level of autonomy can be granted to schools. Schools will then pursue the best results possible to gain greater levels of autonomy and authority. This will, it is assumed, lead to better student outcomes. This is also outlined in the contracts where, "The primary purpose of this Agreement is to improve student outcomes by allowing the district to partner with OP to operate the school as an independent campus subject to transparent accountability requirements."

Theory of Change for SB 1882 Implementation

SB 1882 partnerships are driven by an inherent belief in the efficacy of school districts breaking away from the constraints of traditional school district structures and partnering with outside operators to form charter schools. Texas partnerships embody the PMM idea that if autonomy and authority is granted to the operating partners, desired change will be achieved (Authors, 2024). Figure 3 below illustrates the theory of change guiding SB 1882 partnerships in Texas, which necessitates that districts increase schools of choice that are exempt from requirements of traditional district schools and can exercise extensive autonomy over decision-making in critical areas, including academic models and curriculum, scheduling, budget allocation, and hiring and firing of school staff. Districts should be allocated enough authority to hold contracted school operators in check. This should improve school operation and performance, ultimately improving student achievement.

Figure 3

Theory of Change Guiding SB 1882 Partnerships

If schools are exempt from certain regulations,

And have autonomy and authority to govern inputs and activities, especially those relevant to teaching and learning,

And the district performs select non-teaching and learning functions, while keeping schools accountable for performance,

Then schools will achieve better student achievement outcomes.

Note. Reproduced from Sands & Mairaj, 2024

Inputs for SB 1882 Implementation

In the SB 1882 partnership model, autonomy and authority are themselves inputs, taken as the foundational resources needed for school operators to exercise control over the administration of students' educational experiences. Contracts explicitly state the list of areas over which OP autonomy and authority is necessary for success. This includes implementation of the academic model, selection of curriculum and instructional materials, the hiring and termination of staff, budget allocation, and scheduling. For example, in the contract between Longview Leap and Longview ISD, there are statements such as, "The OP shall have the sole authority over matters involving academic curriculum and the instructional program," and "OP has the initial and final non-delegable authority to hire, supervise, manage, assign, evaluate, develop, advance, compensate, continue employment, and establish any other terms of employment for its employees" (p. 10). It also includes, to some extent, determination over which laws, regulations, and policies of the district should be applicable to the OP's school(s).

Practically speaking, the next critical input is the infusion of additional funds from the states, which is passed through districts to the SB 1882 partnership schools. However, the largest input is the wide breadth of district resources critical to school operations, including facilities and furniture, janitorial staff, healthcare personnel, substitute teachers, technological infrastructure, insurance, financial accounting, data collection and evaluation tools, enrollment systems, food services, and transportation. To this end, an implied input for districts is capacity, including funding, leadership, and political power. They also require authority to manage OPs and other service providers, orchestrate cross-departmental collaborations, monitor and evaluate OPs, and exercise accountability mechanisms when needed.

Activities within SB 1882 Implementation

Activities reflect a complicated and interconnected web of responsibilities between OPs and school districts. In line with the decentralization of autonomy to OPs through the introduction of a PMM and schools of choice, OPs assume responsibility for carrying out a wide range of activities that pertain primarily to the "academic curriculum, the school calendar, the daily schedule, all assessments to be used on the campus, the campus budget, and the educational programs for student groups" (Edgewood ISD & Friends of PTECH, Stafford). A sample of OP activities includes: forming and operating a governing board; selecting and implementing an academic model, including curriculum and instructional materials; recruiting students and staff, appointing staff (e.g., school leaders, teachers, support staff, the Campus Chief Operating Officer); raising funds from private sources, setting and publishing a school calendar; maintaining a balance budget; completing and filing financial audits; and sharing data on students with the district.

Notably, while the contracts state that OPs will have sole discretion over all operations, this is complicated by the vast array of activities the district is intended to oversee. School districts must undertake a wide range of activities critical to maintaining school operations that range from staffing various non-curriculum and non-academic staff to ensuring the continued implementation of critical activities. This includes operations activities like human resources, payroll, accounting, purchasing, groundskeeping, screening of students to determine eligibility for special services, record keeping, and criminal history background checks. Districts must also conduct oversight activities to ensure OPs achieve performance goals based on the contracted schedule, including monitoring and evaluation. Districts lead all activities related to contract assessment, renewal, and termination, including the hosting of public hearings. There are also some dual responsibilities shared by the district and OPs, including communications, financial accounting, the running of the enrollment process, and some processes related to employee hiring, management, and termination.

Outputs, Outcomes, and Impacts

There were only three short term outcomes consistent across contracts: improvement of student achievement, school accountability ratings, and financial performance of OPs. This makes sense given the Partnership Performance Contract Rubric issued and used by TEA to evaluate contracts for benefits eligibility only requires inclusion of these three outcome measures. Intellectual property rights detailed in contracts indicated that all outputs created by the OP during the partnership belong exclusively to the OP.

"Closing the gap" was a key area of outcomes in some contracts, though different measures were identified as indicators of closing the gap across different contracts. For instance, the contract between School Innovation Collaborative and San Antonio ISD included academic achievement, academic growth, student success, and English Language proficiency under the "Closing the Gap Domain." The agreement between Alamo Colleges District and San Antonio ISD, however, identifies academic achievement, the federal graduation rate, and school quality indicators. The outcomes are to be evaluated over the life of the agreement, which is, by law, at least three years and no more than 10 years.

Few contracts detail extensive sets of objectives and metrics, such as stakeholder satisfaction (teachers and parents), teacher professional development, teacher retention, and quality after school programming. Where these more comprehensive outcomes were elucidated, they tended to be vaguely described and poorly aligned to stated objectives of the contract. Table 3 highlights the misalignments

between objectives and outcomes from the contract between San Antonio ISD and Young Women's Preparatory Network. These mismatches between objectives and metrics suggest that while evaluation and monitoring is an activity delegated to the district, the districts may be under resourced to accurately assess OPs and both parties lack the resources to determine accurate measures. No impacts beyond five years were identified, as most contracts only covered a five-year period.

Table 3

Example of misaligned objectives and metrics in contract between San Antonio ISD and Young Women's Preparatory Network

Objective	Metric
School leadership will further the school mission, program, and goals and will act strategically to ensure adequacy, alignment, and coherence of actions.	…Teacher satisfaction rate that meets or exceeds the district average on the district-wide teacher survey (to be developed by the end of the 2019-20 school year).
Provide quality educational programs that enable all students to achieve academically and socially.	Average daily student attendance rate of at least 95%. Attrition rate of less than 25% the first year, less than 15% the second year, and less than 10% the following years.
Meaningfully engage families to establish and maintain positive relationships between school and home.	Parents will show a high degree of confidence in the school model, as measured by the a parent satisfaction rate that meets or exceeds the district average on the district-wide parent survey

SB 1882 Partnership Evaluation Logic Model

In the prior two sections, we developed a general logic model for education policy and used it to analyze the SB 1882 contracts. We then mapped our findings to the logic model. In this section, we build on the first two logic models. Practitioners might consult a logic model like that presented in Table 4 to guide evaluations of SB 1882 partnerships or PMMs in other districts. The approach outlined in Table 4 and detailed below focuses on questions practitioners can ask about PMM policies and interventions with consideration for local context (Thelen-Creps & Lindle, 2022).

Table 4

Select Questions Guiding SB 1882 Partnerships Evaluation Logic Model

Component	Questions for SB 1882 Partnership
Assumptions	To what extent do partners select and implement educational programs, operational practices, and student services that 1) align with the educational needs and preferences of students, 2) are fundamentally different from districts, and 3) lead to different outcomes for students? What sort of accountability mechanisms do districts utilize to check OP autonomy? Are they effective? What kinds of partnerships are implemented and which schools and students do they serve?
Theory of change/ theory of action	Considering local context, what does research on school decentralization reveal about the success of programs designed to improve student achievement through increased autonomy? What does research on school choice, specifically charter schools and portfolio management models, indicate about the ability of schools and districts to improve educational offerings for students? What do we know about the ability of accountability measures to induce reforms and improvement in schools? How does school choice address educational equity regarding racial/ethnic, socioeconomic, and language diversity?
Resources/Inputs	Are OPs wielding their autonomy to meet the full range of diversity in their school communities? Do different OPs wield autonomy and authority in distinct ways that hinder or support partnership success? How complete is the program? Does the district and state provide sufficient resources to implement partnerships? Does the district possess the capacity (leadership, authority, funding, etc.) to effectively implement, manage, monitor, and evaluate partnerships? Are they able to manage the diversity of OPs? Do OPs convert their autonomy into other kinds of power, becoming political actors in their own right and potentially undermining district leadership and authority? Does the program provide resources to students in partnership schools that are not provided to students in traditional districts?

Table 4

Select Questions Guiding SB 1882 Partnerships Evaluation Logic Model

Activities	Were the activities delegated to the district and OPs comprehensive and sufficient to fulfill program goals? Were some specified activities extraneous or others missing?
	Where collaboration is needed to complete activities, are districts and OPs able to effectively work together to execute tasks?
	Were activities delegated to each party implemented with fidelity to the contract?
Results	Do OPs meet the outcomes and yearly performance measures outlined in contracts? What other outputs, outcomes, and/or impacts might be monitored and evaluated to derive a more complete picture of partnerships?
	What reporting and evaluation is undertaken? How are results reported and with whom are results shared?
	What outputs do OPs generate that support the attainment of results and could benefit other schools across the district?
	How are different groups of students impacted by the SB 1882 partnerships?
	How does the community give feedback on the partnerships? How is feedback incorporated into the program?

Assumptions

The assumptions baked into programs and policies ultimately guide how they are implemented (Weiss, 1998). As such, practitioners should evaluate programs with an eye toward verifying the degree to which assumptions are accurate. This is particularly necessary for PMMs as their assumptions are broadly shaped at the national level and come home to roost in local implementation efforts. Thus, a key part of interrogating assumptions must be evaluating them within the local context to support the identification of conditions under which assumptions are accurate or not (Coldwell & Maxwell, 2018). The following list constitutes questions that evaluators may help connect the assumptions to their manifestation in local implementation efforts.

- Did local actors (e.g., district administrators, school board members, communities, and OPs) have all the information necessary to effectively select OPs and implement, manage, and monitor the partnerships?
- Did state statutory and regulatory requirements dictating PMMs create conditions that helped or hindered districts in their decision-making from consideration of SB 1882 partnership initiation to partnership renewal or termination?
- To what extent did partners select and implement educational programs, operational practices, and student services that were 1) aligned to the educational needs and preferences of students, 2) fundamentally different from districts, and 3) leading to different outcomes for students compared to when the school was operated by the district?
- What sort of accountability mechanisms do districts utilize to check OP autonomy? Are they effective?

Theory of Change

The legislation introducing the SB 1882 partnerships and the statutes created to implement the program were intentionally aligned to logics of school choice, PMMs, and decentralization in educational governance. Leaders should subsequently aim to understand how these logics form an overarching framework for the partnerships that dictates how they are implemented. There should be a direct connection between how partnerships split autonomy and authority between OPs and districts and the improvements in school quality and student achievement partnerships are intended to achieve. The questions below are intended to support evaluators in understanding the theory of change behind PMMs and how that theory of change may manifest in the local context.

- What do we know about how well programs that exchange autonomy for accountability work to achieve improvements in school quality and student outcomes?
- What does existing research on school choice, PMMs, and school-based management suggest about the conditions necessary to achieve policy goals?
- Given local context, what does research indicate about the best balance between decentralization and centralization in educational governance?

Inputs

In the case of SB 1882 partnerships and other PMMs, there are two different kinds of questions to consider. The first set of questions concerns whether the traditional resources needed to operationalize programs is sufficient. The second set asks whether resources like autonomy, authority, and power are sufficient to achieve the goals. This distinction is needed because they are

different in kind. Traditional resources include, for instance, financial, human, and technological resources. On the other hand, autonomy, authority, and power are resources of a political variety that the assumptions and theory of change of PMMs demand are needed for the results to be achieved.

It is important to note that school districts might be concerned with goals beyond those identified in program documents. For example, in addition to student achievement, school quality, and financial performance of schools, it is reasonable to imagine that public administrators might also be concerned about democratic and ethical obligations, including maintaining public values in public education, advancing democratic accountability, and inviting community participation. As such, when scoping questions about power, authority, and autonomy, program administrators charged with evaluation may want to expand what qualifies as a goal beyond just those identified as intended results. This is part of an overall strategy for evaluators to think holistically about the resources PMMs require, including time, human capital, leadership, funding, training, infrastructure, and community engagement. The questions below touch on both traditional and political resources.

- Was the right leadership in place on the district and OP sides of partnerships?
- Was the district able to secure all the resources necessary, including funding, power, and authority, to create and sustains the conditions for partnership success? Does the district possess the capacity (leadership, authority, funding, etc.) to effectively implement, manager, monitor, and evaluate partnerships?
- Have partnerships supported or undermined an equitable distribution of resources across the community?
- Are OPs wielding their autonomy to meet the full range of diversity in their school communities? Do different OPs wield autonomy and authority in distinct ways that hinder or support partnership success?

Activities

Given the goal of PMMs is to redesign educational governance in districts through contracting to reform schools and achieve better student outcomes (Hill et al., 1997), there are a host of activities that pertain to the initiation, administration, and evaluation of partnerships and the operation of schools. Evaluations of activities might focus on either category, though it is recommended that for school operation, evaluators examine those activities that reflect a real shift of authority from districts to OPs, as embodied by the below questions.

- Were the activities delegated to the district and OPs comprehensive and sufficient to fulfill program goals? Were some specified activities extraneous or others missing?
- Where collaboration is needed to complete activities, are districts and OPs able to effectively work together to execute tasks?
- Were activities delegated to each party implemented with fidelity to the contract?

Results

Of course, it is necessary in any policy or program evaluation to attend to the question of whether the results were achieved. The questions below provide a means for evaluators to explore those questions. However, as alluded to in the prior sections, reforming school district governance to

expand school choice is inherently political in any policy context (Marsh et al. 2012). In the case of SB 1882 partnerships, the state intended the expansion of PMMs to happen in districts that are demographically and geographically diverse. SB 1882 partnerships also appear to go a step further, with the creation of an OP-run district within the district, where school leaders work for and report to chief operating officers and OP governing boards ultimately responsible for results (Authors, 2024). With that in mind, accounting for the policy context when evaluating and reporting results of partnerships is crucial. We encourage evaluators to expand on the questions below to consider other questions or avenues that connect results to the policy context.

- Do OPs meet the outcomes and yearly performance measures outlined in contracts?
- What sorts of indicators might be identified to help districts monitor partnerships throughout their term?
- What reporting and evaluation is undertaken? How are results reported and with whom are results shared?
- What outputs do OPs generate that support the attainment of results and could benefit other schools across the district?
- How are different groups of students impacted by the SB 1882 partnerships?

Considerations: Insights from Existing Research and Carving New Pathways

The logic model developed in this paper lends itself to research on PMMs, both in Texas under the banner of SB 1882 partnerships and beyond. There are a range of avenues for this research. As launch points, researchers, evaluators, and other practitioners might consider future pathways for research under two broad questions: *What does research about PMMs reveal about policies designed to reform school district governance to achieve better student achievement outcomes?* and *What do we not know about the initiation, implementation, management, and evaluation of PMMs?*

As a relative newcomer on the education reform scene, studies on PMMs are rare and extant research points to mixed results. Other reforms that overlap with PMMs, such as school choice, contracting, site-based management, and school decentralization, indicate that local context matters. This includes the capacity of a given district to manage and monitor school leaders and operators, over what domains outside actors and/or schools are given power, and how much authority and autonomy outside actors can wield (Rho et al., 2021; Edelman, 2010). More research on the tradeoffs between autonomy and accountability, and whether the two can be meaningfully held in check to yield improved results for teachers and students is necessary to fully interrogate the underlining assumptions of PMMs

Using the general theory logic model for educational policy analysis, there are two pathways for research that would significantly extend the existing literature base. First, to date, studies on PMMs have focused on large, urban school districts, and recommendations for conditions for success come from this body of work. The expansion of PMMs to a diversity of school districts presents an opportunity to explore what works under different local contexts. Additionally, expanding studies to these new contexts provides opportunity to investigate and the viability of using a combination of contracting, school choice, and school-based management policies to prompt educational governance reform.

The second pathway concerns the preservation of democratic values and accountability. At all parts of the democratic process and implementation of policies, districts are charged with identifying, incorporating, and representing the needs of communities. However, contractual arrangements, particularly transfer of power to autonomous OPs with no public accountability, create an inherent conflict and potential obstacles. It is critical to understand how districts preserve democratic accountability and the ability to incorporate public values and preferences into decision-making.

Conclusion

How does a district decide if the PMM is helping them achieve their goals for students, schools, and communities? Texas's SB 1882 partnerships present an unparalleled opportunity to evaluate PMMs in districts with a diverse range of demographic profiles, geographic situations, and local contexts. Using a general logic model, actors tasked with managing, monitoring, and evaluating partnerships can design research studies to link assumptions, theories of change, planned work, and intended results with the outcomes observed. Such a logic model might be adapted to support the evaluation of PMMs outside of Texas. Doing so can contribute much needed research on an underexamined area of education reform that is increasingly impacting communities across the U.S. context.

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Appendix A

Table 5

Overview of Contracts Analyzed

Independent School District	Operating Partners	Total School Campus(es)	Year of Contract
Innovation Partnership Contracts			
Edgewood ISD	Friends of P-TECH	1	2021
Fort Worth ISD	Leadership Academy Network (Texas Wesleyan University)	5	2019
Longview ISD	Longview LEAP (East Texas Advanced Academies)	6	2020
Lubbock ISD	Lubbock Partnership Network (LPN)	3	2022
Midland ISD (MISD)	Young Women's Preparatory Network (YWPN)	1	2019
San Antonio ISD (SAISD)	Alamo College District (ACD)	3	2020
SAISD	School Improvement Collaborative	3	2019
SAISD	Young Women's Preparatory Network	2	2019
Turnaround Partnership Contracts			
Edgewood ISD	Friends of P-TECH	1	2020
Fort Worth ISD	Leadership Academy Network (Texas Wesleyan University)	1	2019
Fort Worth ISD	Phalen Leadership Academies	1	2021
Lubbock ISD	Lubbock Partnership Network	1	2022
MISD	Third Future Schools-Texas	1	2020
Waco ISD	Transformation Waco (Prosper Waco)	6	2018

Source: Texas Education Agency

The Impact of New Abortion Restrictions on Medical Students:
A Qualitative Study of Responses to Texas Senate Bill 8

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Abstract

On September 1, 2021, the Texas Legislature passed Senate Bill 8 (SB8), prohibiting abortions after six weeks gestation and allowing private citizens to file lawsuits against anyone who either performs or "aids and abets" an abortion after this point. To understand the broad impacts of SB8 on Texas medical students' experiences and career plans, we conducted a pilot study with 7 semi-structured, in-depth interviews with medical students after SB8 went into effect. Participants reported negative attitudes towards the law and limited opportunities for didactic and clinical exposure to abortion care. Participants noted conflicts between competing desires for comprehensive training and a commitment to serve their Texas community. Most discussed leaving Texas. Restrictive abortion laws impact medical students' decisions about training location, access to comprehensive medical education, and contribute to stress and associated burnout. Better understanding the impact of such laws on medical students is critical to support their medical training experience and for the future of reproductive health care access across the U.S.

Keywords: Abortion, medical students, abortion restrictions, United States, qualitative research

On September 1, 2021, the Texas Legislature passed Senate Bill 8 (SB8), which prohibits abortions after six weeks gestation. Gestational age is the period of time since conception before birth (Lynch & Zhang, 2007). The law also allows for private citizens to file lawsuits against anyone who either performs or "aids and abets" an abortion after the six-week cut-off. As such, SB8 provides an avenue for civilians to report not only clinicians who provide abortion services but also staff members, counselors, drivers, financial supporters – and students and other trainees (Cohen et al., 2021). Texas SB8 predated the U.S. Supreme Court's decision in *Dobbs v. Jackson Women's Health Organization* in June 2022 (which overturned the constitutional right to abortion), making it the first law of its kind to ban abortion in nearly all cases and introduce civil and criminal penalties for "aiding and abetting" (Zielinski, 2022). The novel approach of displacing law enforcement from government entities to civilians presents a unique and alarming quandary for clinicians who provide reproductive healthcare that may be medically necessary but illegal. SB8 has left many Texas health care providers with feelings of fear and despair for both their patients and themselves (Arey et al., 2022, 2023). While there is considerable focus on elucidating the repercussions of restrictive abortion laws on patients (Andersen et al., 2023; Baker et al., 2023; Bell et al., 2023; Williams et al., 2018), the effects on trainees have been less explored (Beasley et al., 2023; Gyuras et al., 2022; Turk et al., 2019). It is vital to study the perspectives of future healthcare providers in order to anticipate the impact of policy like SB8 on reproductive healthcare access.

The Texas context is important because it exemplifies the kinds of burdens abortion laws can create for practicing and training in a state with abortion restrictions. Texas is particularly unique in that it was the first state to implement a law of this kind, where private citizens rather than law enforcement are given the power to report anyone aiding in abortion care. While the effects of restrictive abortion laws on providers and medical training have been explored broadly in the US (Beasley et al., 2023;

Cahill & Meza, 2022; Gyuras et al., 2022), there are limited studies on the impact of SB8 (Arey et al., 2022, 2023). Texas physicians have reported impacts to shared decision-making and limited counseling regarding pregnancy care with patients (Arey et al., 2022, 2023). Some reported that the law has forced them to be "worse doctors" and are leaving the state given its extreme limitations on providing reproductive healthcare (Arey et al., 2022). Additionally, physicians have described increasing mental health effects and provider burnout resulting from SB8 and post-*Dobbs* restrictions (Arey et al., 2022).

As we begin to learn about the broad impacts abortion restrictions have on reproductive healthcare, it is important to identify areas in which medical education is implicated. For further context of what medical school entails: medical school education is most commonly four years and includes both didactic and clinical (or pre-clerkship and clerkship) learning and training (Buja, 2019). Didactic education typically involves classroom education with lectures, exams, and simulations and there are standardized board exams taken throughout the medical career. Clinical learning involves hands-on training in hospitals and clinics treating patients. Both pre-clinical and clinical learning include a broad spectrum of areas in medicine, including core subjects like internal medicine, surgery, pediatrics, psychiatry, and obstetrics and gynecology (OB-GYN) (Buja, 2019). The Association of American Medical Colleges (AAMC) provides medical education curricula framework for medical schools (AAMC, n.d.). After graduating medical school, medical students may choose to go to residency to specialize and become licensed to practice in a field of medicine. The United States has more than 160 specialty and subspecialty residency programs (i.e. internal medicine, pediatrics, OB-GYN, general surgery, emergency medicine, etc.;) (AAMC, n.d.) Medical students apply to their desired specialty during their fourth year of medical school and can interview at residency programs across the country.

Despite the significant number of pregnancies that end in abortion annually (204 abortions per 1,000 live births in 2021) (Kortsmit et al., 2023), half of U.S. medical schools have no abortion training or only a single lecture related to abortion (Burns & Shaw, 2020). Abortion and miscarriage management are essential to OB-GYN training but are unfortunately not offered at every program (Giglio et al., 2022). With restrictive abortion laws, this gap in training is expected to widen, as medical students have less clinical access. A survey of medical student perceptions of clinical abortion training opportunities in 2022 found that the availability of training varies geographically by state abortion laws (Meurer et al., 2024). A study comparing two midwestern states, one with permissive and the other with restrictive abortion laws, found that students in permissive states view abortion as routine health care, while students in restrictive states viewed abortion as political and stigmatized, often seeking more advocacy opportunities (Rivlin et al., 2023). These differences in medical student experiences demonstrate the disparity in medical education, which ultimately impacts patient care (Thaxton et al., 2023).

There have been initiatives, like the Ryan Program, to help standardize abortion training. Data collected over the first twenty years of the Ryan Program (1999-2019), which provides resources to establish family planning rotations that specialize in abortion and early pregnancy loss (Landy et al., 2021), found that only 34% of OB-GYN residencies have a Ryan Program. However, 81% of these residency directors have reported an increase in their program's appeal to residency applicants (Landy et al., 2021), demonstrating the importance of abortion training to residency applicants even prior to the Dobbs decision.

As abortion restrictions continue to be implemented across the country, it is important to understand the influence of legislation on experiences of medical training and medical student priorities when

determining training locations. It is important to understand the perspectives of students and the impact on their education in a state with unique abortion legislation that was the first of its kind. To better understand its effect, we performed a qualitative pilot study to evaluate the impact of SB8 on medical students in Texas.

Methods

We conducted a qualitative study using semi-structured, in-depth interviews with medical students in Texas after SB8 went into effect. Qualitative research aims to elucidate subjective meanings, actions, and contexts of research participants (Fossey et al., 2002). We adopted a qualitative descriptive approach due to the limited information available about our topic of study; a qualitative descriptive approach is appropriate when researchers do not have preconceived ideas about what might be learned from the research (Kim et al., 2016). Because it is not guided by preexisting theoretical commitments, qualitative descriptive research allows maximal flexibility, which is particularly useful when uncovering poorly understood phenomena (Kim et al., 2016). A combination of sampling, data collection, analysis, and re-presentation of the data was performed (Sandelowski, 2000). Data collection involved a semi-structured interview guide and data analysis was low interference, meaning that different researchers have similar interpretations of findings (Kim et al., 2016). This approach was used to provide a deeper and nuanced understanding of medical student perspectives by discussing and presenting their lived experiences.

Participants were eligible if they were Texas medical students in their clinical years, ranging from second to fourth year, between April and August 2022. Medical students from eight of the sixteen Texas medical schools (state and private schools) were identified using personal networks and contacted by phone or email and invited to participate. We also used a snowball sampling strategy in which participants were asked to share information about the study with other medical students in their networks.

Seven medical students from four of the sixteen medical schools in Texas participated in the study. Notably, the four medical schools represented are state medical schools. All participants were female. Three of the participants' specialty choice included OB-GYN or family medicine. The other four participants were planning to apply for residencies in psychiatry, pediatrics, dermatology, and general surgery. All participants provided written informed consent prior to study participation. Participants were not offered compensation.

Interviews were conducted by EB, a medical student with training in qualitative interviewing techniques. All interviews were conducted virtually over a teleconferencing platform. The semi-structured interview guide included questions about: general background on the medical student's training; reproductive health education and clinical experiences; attitudes toward SB8 and restrictive abortion laws generally; and the impacts of SB8 on career planning. The interview questions were open-ended and designed to capture a variety of experiences and opinions, and remained open to both positive and negative effects of the law. Interviews lasted between 30 minutes and one hour, and were audio-recorded and transcribed by EB for data analysis.

Transcripts were analyzed using an inductive, iterative analytic approach (Bingham & Witkowsky, 2021). Transcripts were read to identify themes. Broad themes were identified to encompass the variety of trainee experiences and a codebook was developed by EB. Coding was completed by EB using Microsoft Word with highlighting, commenting tools, and memo-writing. After all transcripts

were coded, we identified themes that were most discussed and are described below. We assigned all participants a study identification number and identified quotes exemplifying each theme. All study materials were approved by the Institutional Review Board at University of North Carolina (IRB# 21-3155).

Results

Thematic analysis of the medical student interviews identified four dominant themes: concerns about the provision of unethical care, abortion training in medical school education, career trajectory decisions, and coping mechanisms for managing negative attitudes towards the law. These themes are described further below. Illustrative examples are provided in Table 1.

Concerns about the provision of unethical care

Participants reported personal moral objections and attitudes toward SB8. All reported that they opposed SB8 and that it directly interferes with patient safety and autonomy. Participants described feelings of anger and frustration as they discussed their inability to provide abortion as an option in their patient care counseling.

> "To have to shut down that conversation [abortion counseling] hands down because there's a law that says it isn't allowed means that I am already not available to listen to that patient and be there for the patient in the way that they need and in the way that we've been trained to take care of patients and [respecting] patient autonomy." (02)

Additionally, medical students reported varying abilities to discuss abortion with their patients depending on their institution, preceptor preferences, and training on abortion counseling. Some revealed that they felt as if they were withholding information from their patients, a direct violation of the Hippocratic oath which is the ethical code that medical professionals abide by (Wicclair, 2010, 2011) and that medical students take as they enter the medical field. All participants reported that they believe offering access to abortion care is an ethical obligation.

They also discussed the personal implications and fears that the law imposed for themselves and their loved ones, regarding the provision of and access to care.

> "If were to become pregnant, I wouldn't be able to provide for a child right now as a medical trainee. I wouldn't be able to access abortion care here [Texas] after that six-week mark. It is scary because [I] could be forced into a pregnancy I don't want." (01)

Abortion training in medical education

The majority of participants reported a lack of didactic and clinical training in abortion care; didactic education typically involves classroom education with lectures, exams, and simulations, while clinical learning involves hands-on training in hospitals and clinics treating patients. All participants reported that they did not have any clinical opportunities involving abortion care. Several students reported that their lectures on abortion were optional and that they were not tested on the subject, creating inconsistencies in their curriculum. Students had to choose to engage with the material, further stigmatizing abortion.

"In terms of baseline curriculum, it's [abortion] just not there. And in terms of seeing that [abortion] in clinic, never." (05)

Students reported that the lack of education and full-scope training that they received was a source of stress. They also expressed frustrations with not being able to talk about it with faculty or clinical preceptors.

"It's almost embarrassing to know nothing about it [abortion], especially when you're a supporter of it and a supporter of providers who want to provide the service. It's something I want to be able to speak eloquently about and be educated on." (03)

Additionally, students discussed that in order for abortion to be included in their medical education, they had to seek outside resources on their own through national organizations and away rotations, which are notably becoming more competitive as abortion restrictions arise in more states.

"I am really active in Medical Students for Choice, which is an organization that gives students the opportunity to get all sorts of different training, like IUD workshops, D&Cs, vacuum aspirations." (06)

Career decisions and trajectories

Most participants reported that SB8 had influenced their decisions for residency training. Six of the seven participants, including all participants pursuing OB-GYN or family medicine, either made the decision to leave Texas for residency or strongly considered it.

"When I was applying to residency, I was definitely open to leaving the state of Texas. In fact, I actively pursued it." (02)

The desire to continue medical training outside of Texas was expressed by medical students pursuing OB-GYN as well as other specialties. One student noted that they regret not ranking out of state programs higher when completing their residency program rank list. Others discussed the added layer of stress of weighing whether to serve their home community or receive full-scope training elsewhere.

"I became a doctor so that I could be a doctor in Texas. I did not intend to leave Texas for training when I came to medical school. I didn't think that there would be differences in the exposure that I would receive. The idea that I would potentially have inadequate training by staying here [Texas] and serving my community is highly concerning to me." (07)

While no participants reported that SB8 changed their specialty choice, for some the law affected the timing of residency applications. One participant reported that the law influenced their decision to pursue a dual degree, such as a master's in public health or business administration, to give residency programs in states with restrictive abortion laws more time to determine their contingency plans for abortion training.

"I made the last-minute decision to take more time to finish medical school. I knew for certain that if I went straight into my fourth year and applied to residency that I was not going to have any clarity on where I was going to have access to abortion training." (07)

Coping mechanisms

Given the negative attitudes and stress that SB8 has caused, we also asked participants to identify any coping mechanisms that they have found to be beneficial in response to the law. Many students endorsed being politically active in their community as members of the Texas Medical Association and advocating with state representatives. Others discussed their work to educate their communities and patients regarding reproductive health practices.

> "I think being politically active is probably the best coping mechanism for me. Understanding that I have a voice." (02)

Participants also reported that SB8 has opened opportunities for discussions among peers and community members regarding the implications of the law. One participant reported feeling more comfortable discussing her opinions against abortion restrictions with friends and family and allowing for open dialogue.

Discussion

This qualitative investigation of the impact of Texas SB8 on medical students identified some ramifications of restrictive abortion laws on medical education and the experiences and decisions of future physicians. All participants reported negative attitudes and frustrations since the passage of the law as it affected not only their interactions with patients, but also their personal well-being. Medical students discussed how the law directly violated the oath that they took at the start of medical school to respect patient autonomy and practice patient-centered care, suggesting conflicts of conscience early in training with potential impacts on choices about training location and timing.

Historically, expressions of conscience in medicine have been considered primarily with respect to refusal of care. The American Medical Association released statements supporting conscientious refusals by medical students, including for services related to abortion and sterilization (Wicclair, 2010). However, scholars have also highlighted that performing abortion is itself often considered an act of conscience (Harris, 2012). Moreover, these scholars have highlighted the importance of conscientious compliance, as well as conscientious refusal, both of which emerge in relation to SB8 (Buchbinder et al., 2016). For example, Texas physicians have reported desires of defying the law, but ultimately decided to comply in fear of putting staff at risk of civil lawsuits (Liptak et al., 2021). Conversely, a provider in San Antonio performed an abortion and was subsequently sued (The Associated Press, 2021). These physicians explained that their motivations for conscientious compliance (or conscientious refusal, of the law) were based on experiences in medicine and evidence of best health outcomes. Violating one's conscience may perpetuate provider burnout and fatigue, particularly among providers of stigmatized care. There is an impact on physician mental health as they grapple with the dilemma of practicing within the constraints of the law versus leaving the state to practice evidence-based medicine (Arey et al., 2022). It is possible that as the effects of SB8 and other similar laws seep into medical education and training, this burnout will emerge even earlier in physicians' careers.

The effects of SB8 are not limited to conflicts of conscience and the resulting burnout for medical students, but also include the weight of decision-making regarding where to pursue residency and potential relocation for students. Most medical students indicated that SB8, as well as restrictive laws in other states, were important to their decision about where to continue their medical training in

residency. Students actively sought out residency programs in states with protected abortion legislation, and others discussed their regret of not considering out of state programs more when determining their rank list for residency match. This is consistent with data released from the Association of American Medical Colleges (AAMC), revealing that the number of U.S. MD applicants decreased by 5.2% for OB-GYN residency programs in states with abortion bans during the 2022-2023 application cycle (Murphy, 2023). In states with total abortion bans, the number of OB-GYN U.S. MD residency applicants decreased by 10% compared to the year prior (Murphy, 2023). These statistics may continue to rise this application season, as applicants continue to prioritize access to full-scope OB-GYN training inclusive of complex family planning. The migration of future OB-GYNs out of their home states is an important consequence of restrictive abortion laws, adding to medical student stress as they consider where to obtain the rest of their training, and potentially leading to disparities in care that are likely to impact physicians wherever they practice, as well as the patients for whom they care.

The limited abortion education in medical school was another source of concern. For one reason, it further perpetuated stigma surrounding abortion care. Medical students who believed abortion should be an integral aspect of their medical school training had to find other ways to learn about it on their own. However, this was not necessarily unique to the implementation of SB8. Despite abortion being one of the most common OB-GYN procedures (Guttmacher Institute, n.d.), a study from 2020 revealed that half of medical schools in the U.S. do not include formal training or only have a single lecture regarding abortion in their curriculum (Burns & Shaw, 2020). This number is likely to grow in the post-Dobbs landscape. Furthermore, the decision to become an abortion provider is often made before residency (Henderson et al., 2023). The increasing limited exposure to abortion in medical schools may affect the number of future abortion providers, perpetuating unequal access to reproductive healthcare.

Limitations and future directions

This pilot study has limitations. Given the modest sample size, it is likely that we did not capture the full range of themes. Further interviews with medical students may reveal additional themes toward thematic saturation, which is the point in data analysis where repetition in themes emerge without new information or significant variation (Rahimi & khatooni, 2024). Due to the possibility that some medical students may have felt hesitant to participate in the study out of fear given the severity of the law, our data may not be representative of the full range of experiences. Additionally, the medical students represented are from state medical schools. Students from private institutions may have other experiences with abortion training. Strengths of this study include detailed information about the responses of Texas medical students to SB8. The medical student perspective is unique and has not been well-characterized. It is important to better understand the implications of legislation for future physicians, and to anticipate the potential ramifications as state abortion bans continue to arise across the country. Further research is needed to better understand the other perspectives of residents and fellows and more fully elucidate the impact of abortion restrictions on the full spectrum of medical training.

This study offers insight into the effect of Texas SB8 on medical students, which may foreground the impact of restrictive abortion laws across the US. Texas' abortion restrictions created negative attitudes and increased stress among medical students as they navigated patient needs and shaped their education and career choices. Understanding the impact of laws on medical trainees is vital to the future of patient care.

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Appendix

Table 1

Illustrative data of interview themes

Concerns about the provision of unethical care	"To tell a woman that she's pregnant and I can't help her…I think it's a violation of my license because I would not be allowed to practice the full extent of it." (04) "At the end of the day, I'm serving a patient in a way that they feel they need. And when I think of the implications that come from me not doing that, I think that is far worse." (02) "There's nothing we can do for them. We can't answer their questions. We can't speak to them like human beings without losing our license." (03)
Abortion training in medical education	"We couldn't even openly discuss [abortion] in lecture to the whole class. So I think that one challenge is that not everyone in my class is receiving the same training just due to personal beliefs." (01) "As a medical student we should have the right to learn about it, because even if you don't practice OB-GYN, you need to have the background knowledge." (01) "We didn't have any dedicated [abortion] lectures, at least not officially on the schedule." (03) "We're not allowed to talk about abortion or offer it as an option unless there was a medical emergency. Even in education it's not really ever mentioned." (05) "In Texas, I think our training is already pretty much non-existent. They can't teach us the procedure [abortion], but I have found that some medical professionals will still inform us…right now I'm getting worried that will change." (06) "As a medical student, I was not involved in helping patients access abortion care. That was not part of my training." (07)
Career decisions and trajectories	"I wanted to ensure that I was making the most complete decision when applying for residency. And so, I have delayed that application a couple of years." (07) "I have some regrets of not ranking out of state programs higher, especially states where [abortion] is legal." (04) "I care about the people of Texas, obviously. But at the same time I kind of want to move. I want to be in a place that has women's rights." (03) "The idea that I could potentially have inadequate training by staying here and serving my community is highly concerning to me." (07) "I don't plan to go to residency in Texas. I plan to go to a state that claims to be supportive of abortion as healthcare." (05)

Table 1

Illustrative data of interview themes

Coping mechanisms	"At some point getting into high schools and teaching sex education, because the schools won't. Or really appealing to my teenage female patients. Taking sex education a step further with patients, and non-patients alike." (04) "I called senators this week." (05) "I've spoken with a lot of other students and providers and learned more about reproductive healthcare and the implications of it." (06) "No matter where I am, I'm going to be fighting for increased education. I'm going to be involved in legislative advocacy." (07)

The Courts Won't Save Us: Community Organizing, Political Advocacy, and Movement Lawyering in Houston ISD

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Abstract

When the state of Texas took control of the Houston Independent School District (HISD) in the summer of 2023, it marked the end of a multi-year legal battle between the district and the Texas Education Agency (TEA) and the beginning of a community-led campaign to re-take control of the district. Since, students and community groups have rallied to hold district and state leaders accountable with a simple demand: End the state takeover of HISD and return control of the district to the community. By drawing on case studies of state takeovers in other large, urban school districts, this paper provides critical insight into strategies that have been effective at ending takeovers across the country. As such, this conceptual paper explores strategies the HISD community could use to regain democratic control of their schools.

Keywords: state takeover, Houston Independent School District, community resistance, political advocacy, movement lawyering

In June 2023, the Texas Education Agency (TEA), under the leadership of commissioner Mike Morath, seized control of the Houston Independent School District (HISD)—the state's largest school district and the eighth largest district in the nation. After eight years of legislative hurdles and legal battles, both the democratically elected school board and the district's superintendent were ousted and replaced by a state-appointed superintendent, Mike Miles, and a board of managers. The state's top political and educational leaders have consistently named the takeover as motivated by school improvement (Carpenter, 2023; FOX 26 Houston, 2023; Houston Chronicle Editorial Board, 2023; Morath, 2023), but critics hold that it was hostile and likely motivated by institutional racism and political power (Morel, 2023). In fact, at the time of the takeover, HISD had a B rating from TEA on the state's A-F accountability rating system, with an overall score of 88 (Hardy, 2023).

For years, parents, teachers, education and civil rights advocates, and members of the Houston community have had serious concerns about state attempts to take over the district. Since 2019, there have been numerous protests, grassroots community organizing efforts, at least two lawsuits, and at least three federal civil rights complaints attempting to prevent or end the takeover. Now, after more than a year and a half under state control, students, HISD employees, and community members have reported a number of serious issues that have arisen due to policy changes by state-appointed district leadership. Some of these concerns include: inadequate special education services (Smith, 2023; Walsh, 2023a; Walsh, 2023c); loss of language supports for emergent bilingual students (Bauman, 2023b; Lopez, 2023b); retaliation against teachers who criticize the new administration or learning model (Choi, 2023; Walsh, 2023b); use of low-quality scripted curriculums (Kelly & Bauman, 2023; Samuel, 2024); replacement of school libraries with discipline centers (Adams, 2023; Carson, 2023); high teacher turnover rates (Mizan & Goodwin, 2024); and a pattern of authoritarian and undemocratic behavior by district officials (Covington & McNutt, 2023).

This investigation details the legislation and litigation that paved the way for the takeover and the need for a movement lawyering approach to the ongoing legal issues in HISD, in addition to continued grassroots community organizing and coordinated, sustained direct action, in order to end the takeover. While it is necessary to pursue traditional legal routes—such as lawsuits and federal complaints—to return the district to local control, litigation can take years and frequently ends in dismissal. Further, federal civil rights complaints have no set deadline by which they must be completed, and investigators can choose not to investigate or intervene after reviewing a complaint. Therefore, it is imperative that communities also incorporate non-legal strategies, such as legislative advocacy, grassroots organizing, direct action, and community mobilization efforts. To illustrate the importance of these methods, this investigation will incorporate case studies from urban school districts across the country that successfully regained local control after a state takeover. The investigation closes with discussion on how the HISD community can use these cases as blueprints to win back local control of their schools.

Background

State Legislation

In 2015, the Texas State Legislature passed HB 1842, a bill that requires the TEA commissioner to either close the campus or replace the elected school board and superintendent in any district where a single school campus receives an F rating for five consecutive years (pp. 24–25). The bill, which passed with support from more than 80 percent of all Texas legislators (84 H. Jour., 2015, p. 5916; 84 S. Jour., 2015, p. 3620), also allowed a "phase-in period that gives struggling schools a few years to meet state standards before triggering the law" (Dunlap, 2023). The same year the bill passed, eight of HISD's 45 high schools were rated "Improvement Required" by TEA, with five of those schools failing to meet state standards for the previous three years as well (Mellon, 2015). During the following legislative session, Texas passed SB 1882, which allows districts to surrender "control of a struggling school to a charter network, university or nonprofit, and receive a two-year exemption from HB 1842 sanctions" (Dunlap, 2023).

Shortly after SB 1882 passed, HISD declined a proposal from the state to grant control of Wheatley High School, which had a years-long history of poor performance ratings, to the charter network Energized for STEM Academy (Dunlap, 2023)—a move that would have potentially delayed state sanctions. When Wheatley received its seventh consecutive F rating from the state in 2019, TEA commissioner Mike Morath notified HISD of his plans to strip the district of its locally elected school board and appoint a new governance team and superintendent (Carpenter, 2019a; Morath, 2019).

Litigation

In the months and years after Morath announced his intent to take over the district (Morath, 2019), HISD engaged in a multi-year litigation battle with the state to prevent TEA from taking control of the district's 274 schools. HISD sued the State of Texas in August 2019, alleging the state had a history of violating the federal Civil Rights Act of 1964 by only removing "board members from school districts whose voters are predominantly people of color" (Carpenter, 2019b; *Houston ISD v. TEA, et al.*, 2019a, p. 43). By this point, TEA had already appointed a conservator to oversee the district due to chronically low performance at several campuses, and many HISD officials believed TEA was determined to take control of the district by any means available (Carpenter, 2019b). A

Travis County district judge sided with HISD and granted a temporary injunction in January 2020—a decision a state appellate court upheld months later—which temporarily delayed the start of the takeover (Swaby, 2020).

Ultimately, TEA appealed the injunction to the Texas Supreme Court, where the agency's lawyers argued that HB 1842 granted the state full discretion and authority to execute a state takeover if preconditions were met (Nguyen & Serrano, 2023). TEA argued that HISD did meet those preconditions, outlining three main reasons as the legal justifications for the takeover:

> the consecutive unacceptable academic accountability ratings received by Wheatley High School, a Special Accreditation Investigation that demonstrated multiple violations of law in the district, and the fact that the continued appointment of a conservator had been necessary in the district for at least two school years to ensure changes were made to improve student academic performance. (Morath, 2023)

In response, HISD officials claimed that because the district had made significant academic improvements in recent years—the district received a B rating in 2022 and Wheatley High School received a passing grade from TEA—the takeover was no longer necessary (Nguyen & Serrano, 2023). Despite these arguments, the court retroactively applied provisions from SB 1365, a bill passed during the 2021 legislative session that adjusted the criteria necessary for the state to initiate a takeover (Nguyen, 2022). This effectively nullified the argument the district originally made to block the takeover. Thus, in January 2023, after nearly four years of litigation, the Texas Supreme Court sided with TEA, ending the injunction and allowing the state to proceed with the takeover (Dunlap, 2023).

HISD had the opportunity to file an appeal following the Court's ruling but ultimately decided to end their lawsuit, noting that a favorable decision from the state was unlikely and that an appeal would mean more public education funding would be used for the legal fight and not on students (Bauman & Carballo, 2023). This decision to abandon the legal fight was contentious across the HISD community. Despite the school board ultimately voting 5-4 against pursuing an appeal with the Texas State Office of Administrative Hearings, some trustees, such as Myrna Guidry, argued the district should have continued to exhaust every possible option before accepting the outcome (Carballo, 2023).

Community organizations and labor unions were also unsuccessful in their lawsuits to stop the takeover. In 2019, the Houston Federation of Teachers (HFT), the city's largest teachers union, joined with HISD to file a lawsuit against TEA, arguing that the state's plan to take over HISD discriminated "against people of color by moving to oust the Houston school board over failing grades at one historically black school" (Johnson, 2019). Together, the district and teachers union sought an injunction to the takeover, but a federal court judge denied the injunction and dismissed the case (*Houston ISD v. TEA, et al.*, 2019b, pp. 12–13; Swaby, 2019). HFT filed another suit months later, this time arguing that the takeover violated the Voting Rights Act of 1965 (*Houston Federation of Teachers v. Texas Education Agency*, 2020). TEA requested to transfer venues in this case, and a United States district judge granted the request and closed the case in May of that year (*Houston Federation of Teachers v. Texas Education Agency*, 2020); HFT did not refile the suit. After nearly five years of unsuccessful attempts to stop the takeover through lawsuits, HISD and community advocates abandoned litigation as a legal strategy.

Texas Labor Laws

When considering the unsuccessful attempts at preventing the takeover through traditional legal means, it is important to note that Texas has strict right-to-work laws that prohibit collective bargaining, striking, or union security agreements between public employees and the state (6 Tex. Gov. Code, Ch. 617, 1993/2019). As a result, HISD employees do not have the same labor protections available to them as school district employees in some other states. In recent years, teachers have gone on strike in states across the country to advocate for higher wages; better working and learning conditions; facilities maintenance, such as installing air conditioning; and housing assistance for students and staff (Will, 2023). For instance, Los Angeles teachers went on strike in 2019 and were able to secure "more community schools, the elimination of random searches of students, and legal support for students and families facing immigration-related concerns" (Will, 2023).

Public educators in Chicago have led strikes twice in the past two decades: once in 2012 to pressure the district to hire more nurses and social workers and again in 2019 to demand social and economic justice, including access to affordable housing for students and teachers (Will, 2023). While HISD employees are allowed representation by labor groups, such as HFT and the Texas State Teachers Association (TSTA), and to file grievances against their employers for violating state or federal laws, they are not allowed to collectively bargain for wages, working conditions, or other labor-related issues. Neither are Texas teachers allowed to engage in protected labor activities, such as strikes, picketing, or sick-outs, without the threat of being disciplined, terminated, or having their teacher or professional licenses suspended. This leaves HISD teachers and school staff with limited options to address toxic and hostile workplace conditions as compared to teachers in Los Angeles, Chicago, and many other major urban cities.

What Ends a Takeover? Case Studies from Urban Districts Around the Country

As students and families across HISD continue to fight for their district, advocates can learn valuable lessons from communities that have successfully fought to regain local control from state takeovers. Over the past 30 years, there have been at least 140 state takeovers of local school districts across the country (Lopez, 2024; Schueler et al., 2023). The federal government "authorized state takeovers of chronically underperforming school districts" in 2001's No Child Left Behind Act (Morel, 2018, p. 3), and, as of 2017, at least 33 states permit takeovers of local school districts (Morel, 2018, p. 3). While "state leaders have cited fiscal challenges for 68% of takeovers and poor academic performance for 46%" (Schueler et al., 2023), Morel (2018) contends that "state takeovers of local school districts are about race and political power" (p. 4)—a belief echoed in HISD's and HFT's aforementioned lawsuits (*Houston ISD v. TEA, et al.*, 2019a, p. 43; Johnson, 2019), as well as by community advocates (Community Voices for Public Education, 2023).

Furthermore, research shows that state takeovers do not generally yield improvements in student academic outcomes and financial management (Lieberman, 2024; Schueler & Bleiberg, 2022; Schueler et al., 2023), particularly in school districts with large populations of Black students, "which have been disproportionately targeted for takeover" (Lyon et al., 2024, p. 3). In studying more than 30 state takeovers in 14 different states between 2011 and 2016, Schueler and Bleiberg (2022) found no evidence that takeovers improve student academic outcomes (p. 175) and, instead, that they produce notable declines in English Language Arts and math scores in the second and third years (p.178). Evidence also shows that takeovers are especially disruptive in the early years of reform,

particularly for reading achievement, though more research is needed to determine the longer-term effects (Schueler & Bleiberg, 2022; Schueler et al., 2023).

State takeovers also destabilize school districts by disrupting school climate and culture, often resulting in high teacher and staff turnover and exclusion of parent and community engagement (Morel, 2018; Wilson & Latham Sikes, 2020). In HISD, for instance, 10,000 employees left the district between the beginning of the takeover and August 2024, including about 2,400 teachers who left in June 2024 alone—more than the total number of teachers who typically leave the district over the course of an entire year (Mizan & Goodwin, 2024). The number of employees who left the district during the first year of the takeover included about 4,700 of the district's roughly 11,000 teachers, or about 43 percent of the teaching staff (Mizan & Goodwin, 2024).

Though the long-term impacts of these disruptions remain to be seen, the high teacher and administrator turnover rates in HISD has further deteriorated the relationship between the district's administration and the community. The first year and a half of the takeover has been marked by numerous protests (Bauman, 2023a; Kelly, 2024; Mizan, 2024b) and student walkouts (Guadalupe & Manchac, 2023; Menchaca, 2024a; Sessions, 2024). Parents have expressed that the district is now characterized by "upheaval," "instability," and "unrest" (Goulding, 2024), while students have demanded the termination of state-appointed Superintendent Mike Miles and the restoration of the elected Board of Trustees; the revocation of harmful and restrictive district policies; an open line of communication between the district and students and teachers; and an end to unprovoked staff terminations (Students Against Miles, 2024).

As the Houston community continues to demand an end to the disruption and turmoil brought on by the takeover, an education policy expert and former Houston-area school superintendent described Miles as "not help[ing] bridge the divide" between his new administration and the community (Zuvanich, 2024b). Instead, Miles has at times taken an antagonistic tone, accusing the community of "playing politics" at the expense of supporting children (Houston Independent School District, 2024) and writing a letter to the city's Democratic state legislators admonishing them to "lead, follow, or get out of the way" (Menchaca, 2024b).

Methodology

In many states, there is no limit to the amount of time a state takeover can last: The takeover of Philadelphia's school district, for instance, lasted 16 years (Eichel, 2017); Detroit's public schools were under state control for most of the 17 years between 1999 and 2016 (Levin, 2019); and Newark public schools only regained local control in 2020, after having been taken over in 1995 (Wall, 2020). Despite the growing prevalence of state takeovers across the country (Danley & Rubin, 2020; Morel, 2018), there is a notable gap in educational research about what is effective at ending state takeovers of local school districts. However, based on an analysis of available news articles, issue briefs, and reports by both district officials and community advocates, it appears that in large, urban cities where the school districts have been hostilely taken over by the state, it is not typically a traditional legal route, such as litigation or a federal complaint, that ends a state takeover. Instead, it is a combination of both legislative advocacy and sustained, organized community resistance.

The following sections offer case studies of three urban districts that were taken over by their respective states and the events that brought those takeovers to an end. I selected the school districts of Newark, Detroit, and Philadelphia because of a few notable similarities. First, like

Houston, each of these districts is situated in a large, urban metropolitan area, with diverse racial and socioeconomic populations (Census Reporter, 2022a; Census Reporter, 2022b; Census Reporter, 2022c; Census Reporter 2022d). Additionally, these districts were all taken over by the authority of the state, as Houston's was, rather than by the mayor or local government,[1] and through hostile, undemocratic means, rather than by cooperation between the state and the local community. Finally, I chose these districts because each of these takeovers has ended, and the districts have all returned to local control.

Newark Public Schools

In 1995, the State of New Jersey took over the Newark Public School District in a hostile takeover that lasted for 25 years (Morel, 2018; Wall, 2020). A state judge deemed the district's school board "so incompetent and the education system so riddled with failure" that he bypassed the standard hearing process and ordered the takeover to proceed on account of low academic achievement and financial mismanagement (MacFarquhar, 1995). By the time Chris Christie was elected governor 15 years after the takeover began, "the state had its own record of mismanagement, and student achievement had barely budged" (Russakoff, 2014).

It was at this time that Newark Public Schools underwent a radical change in structure, with Christie shifting a "large percentage of Newark students to privately managed charter schools" after publicly disparaging the district at a press conference (Danley & Rubin, 2020, p. 670). The district's newly appointed superintendent, Cami Anderson, quickly moved to close several of the city's public schools to make space for 11 charter schools (Danley & Rubin, 2020, p. 670), even though the schools targeted for closure were not the lowest performing academically. A 2014 report by Rutgers University found, instead, that the schools poised for closure served large populations of low income and Black students (Danley & Rubin, 2020, p. 671). Anderson's decisions drew swift opposition from the Newark community, which showed up to school board meetings in large numbers to heckle Anderson and voice their dissent to Christie's changes (Danley & Rubin, 2020, p. 670).

Tensions continued to rise between the district and students and families in the years after Anderson's appointment. Community activism escalated in response: One group of Newark students staged a "four-day protest in the district's central office," (Morel, 2018, p. 144) and another group led a student walkout that created traffic disruptions on a nearby roadway (Morel, 2018, p. 145). In response to Anderson's plan to close multiple campuses and expand the district's charter network, civic and religious leaders released a public letter signed by more than 75 individuals opposing the changes. Newark legislators also voiced their opposition by proposing a bill to stop the forced school closures (Danley & Rubin, 2020, p. 671). Given then-Governor Chris Christie's desire to seek the Republican nomination for president of the United States (Morel, 2018, p. 145), the growing negative publicity prompted Christie to distance himself from the protests. This distancing acted as a catalyst for returning the district to local control, and in 2017, the district began initial talks with the state about transitioning back to local governance (Morel, 2018, p. 145).

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[1] There is some debate about Detroit's first takeover (1999–2005), with Kang (2015) classifying it as a mayoral takeover that occurred because of the persistence of Michigan Governor John Engler (pp. 106–115). However, Piliawsky (2003) contends that since one member of the 7-member appointed board was appointed by the governor and had veto power over the other board members, "the state, not the city, actually control[led] Detroit public schools" (p. 265). During the second takeover, from 2009–2016, Detroit schools were controlled by state-appointed officials.

In large part due to "the political struggle of the community" (Morel, 2018, p. 145), the state restored the school board's authority on a provisional basis in 2018; in 2020, the New Jersey State Board of Education voted unanimously to end state oversight of the district, officially ending the takeover after 25 years (Wall, 2020). Danley and Rubin (2020) identified several key factors that made the community's campaign of organized resistance successful. First, Newark's access to social and economic capital, such as the city's infrastructure of nonprofit organizations and community groups, meant that students and families could rely on an established support system of experienced social advocacy workers to help coordinate their actions (Danley & Rubin, 2020, p. 676). Second, Newark's access to media and timely news coverage allowed communities to stay informed on updates and changes in the district (Danley & Rubin, 2020, p. 677). And finally, the public support of prominent local political leaders and elected officials legitimized community opposition to the takeover, resulting in a "positive portrayal of the resistance" across the city (Danley & Rubin, 2020, p. 678). Combined, these social and political conditions allowed the community's sustained, organized resistance and political advocacy to be effective strategies at facilitating an end to the state takeover in Newark.

Detroit Public Schools

Detroit Public Schools (DPS) has been taken over twice: first from 1999–2005 and then again from 2009–2016. In 1999, Michigan's then-Governor John Engler successfully lobbied the Michigan legislature to pass a bill that would allow him and the mayor of Detroit to replace DPS's democratically elected school board with a 7-person appointed board (Kang, 2015; Piliawsky, 2003; Steel, 2020)—even though "DPS actually had modestly increasing enrollment, a positive fund balance, and midrange scores on standard exams" (Steel, 2020). The district struggled under the reform board and went "from having a budget surplus to a $200 million deficit" (Steel, 2020).

Throughout the takeover, parents, students, teachers, and school employees actively protested layoffs and school closures (Grover & van der Velde, n.d.; Isaacs, 2002). At one school board meeting, more than a dozen attendees, "including at least three high school students, two teachers and two parents, were arrested and forcibly removed" for chanting and disrupting the meeting, with a goal of preventing the appointed board from conducting any business (Mackinac Center for Public Policy, 2002). Protests at board meetings became "so disruptive" in 2002 that the district considered holding the meetings in smaller locations or disallowing in-person attendees and, instead, broadcasting the meetings by closed-circuit television (Grover & van der Velde, n.d). After five years under state control, a sunset clause in Michigan law granted Detroiters the right to vote to regain control of the district. Although the Detroit mayor and chamber of commerce supported a continuance of the takeover, a coalition of local community groups, religious leaders, and the Detroit National Association for the Advancement of Colored People launched a get out the vote campaign, encouraging voters to cast their ballots in opposition to the takeover (Kirby, 2012). The campaign proved successful: In November 2004, the electorate voted by a 2:1 margin to bring back the locally elected school board and end the takeover (Steel, 2020).

DPS was subjected to a second takeover in 2009 when Gov. Jennifer Granholm appointed an emergency manager, Robert Bobb, to lead the district (Steel, 2020).[2] Following Bobb's appointment, tensions flared between the state-appointed leader and the community, and several lawsuits were filed, one of which successfully challenged the new administration's "attempt to change academic management" (Steel, 2020). Although this lawsuit restored some power to the democratically elected school board, "Bobb closed 59 DPS schools in the course of two years, fired and then rehired hundreds of teachers and counselors, privatized the custodial staff, and left DPS with a $284 million deficit" (Steel, 2020). Ultimately, a review commissioned by DPS after the takeover found state oversight of the district was marked by financial mismanagement, neglect of district facilities, and failure to address student academic achievement and falling enrollment (Pitchford, 2019, p. 2). The review also notes that the accounting of these transgressions "likely fails to capture the most significant losses to DPS: countless students throughout the City of Detroit who were likely not afforded the educational opportunities they needed and deserved" (Pitchford, 2019, p. 2).

Mobilized by the mounting challenges and deteriorating schooling conditions (Myers, 2022), students, parents, school staff, and members of the community were instrumental in coordinating legislative advocacy and sustained direct action efforts over the course of several years. The community formed teams, mapped their connections, partnered with the teachers union, lobbied legislators involved in shaping education policy—even helping to draft legislation (Hawkins, 2016)—and collected and amplified student voices (Myers, 2022). In 2012, more than 200 Detroit high school students were suspended for walking out of school to protest school conditions and closures (Sands, 2012). Some of the students who were suspended organized a "Freedom School" for the students to attend for the duration of their suspensions, with the goal of showing district officials they were serious about both their education and their demands (Cwiek, 2012). Echoing these student concerns, the Coalition for the Future of Detroit Schoolchildren—a group of academic, business, government, and community leaders—called for the end of the state takeover and recommended "creating a nonpartisan entity that oversees the district" (Karoub, 2015).

School staff also played a significant role in drawing attention to the district's worsening conditions. DPS teachers and the Detroit Federation of Teachers staged repeated massive "sickout" protests in 2016 (Bartkowiak, 2016; Fantz, 2016; Moskowitz, 2016), successfully closing schools 14 times, sometimes for multiple days in a row (Cwiek, 2016; Schouten, 2016). At the peak of the rolling sickout protests, teachers shut down 94 of Detroit's 97 public schools (Fantz, 2016). Like Texas currently, Michigan was a right-to-work state at the time of the DPS teacher sickouts,[3] and teacher strikes were illegal under Michigan law (Schouten, 2016). However, the teachers were not deterred from protesting, and in August 2016, a court ruled in the teachers' favor in a lawsuit brought by DPS, saying the sickouts were politically motivated and therefore protected under the First Amendment (Schouten, 2016; Zaniewski, 2016). Ultimately, sustained pressure from the community and legislative advocacy worked to convince state lawmakers in 2016 to pass a package of legislation, including a $617 million bailout of the district, that ended nearly 15 years of state control (Levin, 2019).

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[2] Bobb, like HISD's state-appointed superintendent, Mike Miles, is a graduate of the Broad Academy (Broad Superintendents Academy, n.d.; Kang, 2015, p. 165), which emphasizes disruption (Ravitch, 2024) and trains superintendents to use "corporate-management techniques to consolidate power, weaken teachers' job protections, cut parents out of decisionmaking, and introduce unproven reform measures" (Samuels, 2011).

[3] Michigan repealed its right-to-work law in 2023.

School District of Philadelphia

In December 2001, the School District of Philadelphia became the largest school district in the country to be forcibly placed under state control (Travers, 2003, p. 1). While the state cited financial issues and low accountability ratings as the reasons for the takeover, state leaders were motivated to take control of the district, in part, to enact "alternative market-based approaches—such as charters, vouchers, and privatization—to governance and management of schools" (Travers, 2003, p. 2).[4] Prior to the takeover, the School District of Philadelphia and the City of Philadelphia filed a federal civil rights lawsuit against the state, alleging the state "discriminated against school districts with large numbers of non-white students" (Defend Public Education, 2015) in their funding practices. Ultimately, the district and the city both agreed to withdraw the lawsuit in exchange for the ability to appoint two members of the five-member School Reform Commission (SRC), which was responsible for governance under the takeover, and to maintain some control over patronage jobs and contracts in the district (Defend Public Education, 2015).

Philadelphia has a long history of grassroots activism and community-led public education campaigns. After the *Brown v. Board of Education* ruling, students and families organized to hold the district accountable to desegregation requirements; in 1967, students from across the city led walkouts to demand Black studies curriculum; and throughout the 1990s, the community led campaigns opposing district funding cuts and punitive disciplinary practices (Cohen et al., 2018, p. 425). Organized resistance not only continued but also increased (Cohen et al., 2018, p. 425) immediately following the announcement of the takeover, beginning with two dozen demonstrators who blocked a public roadway in protest (Graham, 2018). However, district leaders remained undeterred by early resistance efforts and moved ahead with plans to gradually incorporate market-based reforms (Cohen et al., 2018, p. 425).

During the 16 years the district was under state control, governance was marked by thousands of layoffs—at one point including all counselors, assistant principals, and secretaries (Graham, 2018)—and dozens of neighborhood school closures. In the spring of 2013, the district voted to close 24 schools, or about one out of every 10 schools in the district, affecting nearly 10,000 students (Gym, 2013). Additionally, this time period was marked by a rapid expansion of charter schools (Bryant, 2018), which was a specified "contract deliverable" in the agreement between the Boston Consulting Group—the company responsible for restructuring the district during the takeover—and its private donors (Gym, 2013). In the same year the district voted to close 24 schools, it "expanded charters by more than 5,000 seats" (Gym, 2013). The district also eliminated all sports, extracurricular and gifted programs, and money for books and supplies (Gym, 2013).

Despite these attempts to disrupt and defund the School District of Philadelphia, students, teachers, and members of the community came together to lead a "campaign of resistance" (Bryant, 2018). This resistance was marked by acts of civil disobedience by the Philadelphia Student Union (Defend Public Education, 2015), including one instance early in the takeover where student protesters formed a human chain to block district employees from entering school district headquarters for work (Global Nonviolent Action Database, 2011). When district officials attempted to bus employees to a different location for the day, students then blocked the bus, forcing the district to

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[4] This shares striking parallels with Texas lawmakers' current push to pass private school voucher legislation and to expand charter school networks.

give the employees the day off (Global Nonviolent Action Database, 2011). This action additionally forced the SRC to relocate a scheduled meeting (Global Nonviolent Action Database, 2011).

As the takeover continued, three influential community groups began coordinating advocacy strategies (Cohen et al., 2018, p. 428). The Philadelphia Coalition Advocating for Public Schools, Parents United, and the faith-based coalition POWER formed an ad hoc partnership that collaborated on advocacy actions and tactics. This super-coalition was an "unprecedented collaboration" of Philadelphian advocates, with each organization pulling from their broad memberships to drive campaigns, educate the public, and sustain pressure on district leaders (Cohen et al., 2018, p. 428). Notably, because POWER had relationships with community groups outside of traditional public education stakeholders, the coalition was able to reach a broader audience to include people who were "neither educators nor parents, neither students nor corporations" (Cohen et al., 2018, p. 429) and increase public awareness of the harms of the state takeover.

Teachers also played important roles in resisting the takeover through organized labor campaigns and public outreach efforts. Although Pennsylvania is not a right-to-work state, teachers were prohibited from striking as a form of protected labor activity during the takeover. Despite this rule, in May 2017, about 1,000 Philadelphia teachers used personal days to stage a sickout to protest the fact that they had been working without a contract for more than four years under the district takeover. The mounting pressure was targeted, in part, at Democratic Governor Tom Wolf, who campaigned against Republican incumbent Tom Corbett in 2014 with the promise that he would replace the SRC with a locally elected school board by creating "an environment where an SRC isn't necessary" (McCorry, 2015). Two years into Wolf's term, and after nearly two decades of sustained community activism, state control of Philadelphia's schools ended in November 2017, when the SRC "voted itself out of existence" (Bryant, 2018).

Movement Lawyering, Community Advocacy, and Grassroots Organizing

While lawsuits have been ineffective at preventing or ending state takeovers of large, urban school districts, there are several legal and grassroots advocacy strategies available to help students, teachers, and school communities in their fight against state takeovers. The practice of movement lawyering is one approach that communities and legal professionals can use collaboratively to effect change in HISD and return control of the district to the local community. In contrast with traditional legal approaches, movement lawyering is a legal framework that centers the lived experiences of directly impacted communities and organizers (Law for Black Lives, 2021). Movement lawyering means "building the power of the people, not the power of the law" and focuses on dismantling oppressive systems, such as white supremacy and capitalism, rather than winning singular legal battles or lawsuits (Law for Black Lives, 2021). Instead of imposing the legal strategies they believe will help the situation, movement lawyers seek to "build the collective power needed to transform our political and economic systems towards human dignity, multiracial democracy, and ecological harmony" (Movement Law Lab, n.d.).

In the context of HISD, lawyers and legal professionals could partner with impacted students, teachers, staff, and families to identify how the state takeover has negatively impacted their school communities and collaborate with community and organizing groups on the legal routes they want to pursue. They could begin this process by conducting listening sessions with students and families in schools implementing Superintendent Miles' "New Education System" (NES schools) and leading "know your rights" sessions that provide the community information on legal avenues that are

available to them. After this process, lawyers and community groups should collaboratively partner to determine what legal strategies are best for the movement and pursue them only after they receive support and buy-in from the students, teachers, families, and communities impacted by the takeover. Additionally, since ending the takeover of HISD will most likely necessitate changes to state law—whether by federal intervention or state legislative actions—it is vital that movement lawyers partner with impacted communities in the district to ensure that any legal defense centers students and families, rather than the voices and interests of the legal community.

Organizing and Community Advocacy

While movement lawyering and other legal strategies have the potential to make systemic impacts, grassroots organizing remains an essential tactic students, families, and district employees can utilize to hold school leaders and elected officials accountable to the communities they serve. In HISD, students, families, and community groups have successfully mobilized a diverse coalition of supporters since the start of the state takeover. These organizing groups—including Community Voices for Public Education (CVPE), HFT, Students Against Miles, and the No More Harm Campaign—have led protests (Bauman, 2023a; Kelly, 2024; Mizan, 2024; Sessions, 2023); student walkouts (Guadalupe & Manchac, 2023; Menchaca, 2024a; Noel, 2023; Sessions, 2024); and social media campaigns, branding one series of posts that highlights district leadership's administrative mismanagement the "Mike Miles Errors Tour" (Community Voices for Public Education, 2024a; Community Voices for Public Education, 2024b), in reference to Taylor Swift's Eras Tour. In 2023, HISD students, parents, and concerned community members formed an arts collective called Houston Stitching Together, which protests the takeover by crocheting elaborate art pieces that feature anti-takeover messaging and placing them in high-traffic shopping areas around Houston, including at several local coffee shops and businesses (Turner, 2024). The collective, which now has more than 200 members, has dubbed this ongoing public art project "yarn bombing" and aims to raise awareness about the takeover throughout the city (Turner, 2024).

Additionally, a diverse group of community members mounted a successful campaign against a $4.4 billion school bond proposal, which would have been the largest school bond in Texas history had it passed in the November 2024 election (Menchaca, 2024c). The bipartisan coalition—which included CVPE and the No More Harm Campaign, HFT, religious leaders, labor and civil rights organizations, and both the Harris County Republican and Democratic parties (McClenagan, 2024; Menchaca, 2024c)—came together to reject the bond, with about 58 percent of voters voting against the proposal (Lehrer-Small, 2024). Organizers of the "No Trust, No Bond" campaign emphasized that because the Houston community cannot hold the appointed board or superintendent accountable, rejecting the bond was the "only chance our community has to weigh in on the state of HISD" (No More Harm, n.d.). In what was widely seen as "a referendum on Miles' leadership" (Lehrer-Small, 2024), it was the first HISD bond rejected by voters since 1996 (Lehrer-Small, 2024).

With sustained pressure, community groups have successfully drawn the attention of local and national news outlets and elected officials, who have shown increasing concern about issues regarding special education and punitive discipline in HISD. For example, in April 2024, nine members of the Texas House of Representatives, including Houston-area Reps. Christina Morales and Penny Morales Shaw, called for a state public hearing to address complaints received about HISD since the district was taken over by TEA in 2023 (Zuvanich, 2024a). When used in tandem with legal strategies, committed grassroots advocacy campaigns and sustained, organized resistance

could create a public demand for change that ultimately yields state or federal intervention and an end to the takeover.

Discussion

For more than a year and a half, Houstonians have been subjected to one of the most hostile and undemocratic educational takeovers in the United States. After removing a locally elected school board and seizing control of a district that had an overall B rating from TEA, the state installed a superintendent, Mike Miles, who has an extensive history of mismanaging district finances, violating state policy, and undermining educational equity in public schools under his supervision (Banks, 2024; dallasnews Administrator, 2015; Kelley, 2017). The result has been a school district rife with students' and teachers' rights violations, ranging from failures to provide language and special education accommodations (Bauman, 2023b; Lopez, 2023b; Smith, 2023; Walsh, 2023a; Walsh, 2023c) to intimidating school staff who voice dissent to new policy changes (Choi, 2023; Kelly, 2023; Mizan, 2024a; Walsh, 2023b). While these changes have taken place, students, school staff, and communities have rallied together to demand accountability and lead public education campaigns, protests, and demonstrations. In recent months, advocates have also worked alongside community groups to file civil rights complaints and call for federal intervention in the state takeover. Though lawsuits and traditional legal strategies failed to prevent—and thus far to mitigate—the state takeover, community actions, when paired with movement lawyering approaches, have tremendous potential to undo many of the harms caused by the state.

As elected officials increasingly push for an end to the takeover, it is crucial that organizers continue to engage in political advocacy and local elections campaigns to support candidates who are committed to ending the takeover. With Texas' current legislative session scheduled to convene until June 2025, there is also potential for legislation that could limit or mitigate the powers of TEA to carry out state takeovers of Texas school districts. It is imperative that organizers and community groups rally around candidates and elected officials that support local control of public schools and educational equity in general. Though political advocacy and voter registration drives may not result in immediate changes for students and staff being harmed by the state takeover of HISD today, these strategies have the potential to create long-lasting legislative changes that can protect students and school communities for decades to come. Because Texas continues to have a legislative and judiciary system that is increasingly hostile to public education, it is vital that organizing groups pair their community-based strategies with political advocacy, grassroots organizing, and pro-voter activities.

With many challenges ahead in the fight against the takeover, the HISD community can take inspiration from the hard-fought successes of students, teachers, and community advocates in Newark, Detroit, and Philadelphia. As these communities have shown, sustained and committed organizing and direct action can lead to policy victories and meaningful systemic change. It is up to communities across Houston and the state to stand by students, families, and district staff in the fight to return HISD to local control.

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Transparency Under Takeover:
Financial Ramifications of the TEA Takeover of Houston ISD

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Abstract

This paper examines the financial transparency and accountability practices before and after the 2023 state takeover of the Houston Independent School District (HISD). Superintendent Mike Miles and his Board of Managers reallocated critical district resources towards troubling new "priorities," while the district was facing a sizable deficit. Parents and community members raised concerns about the district's transparency and accountability practices, which sparked backlash throughout the first year and a half of the takeover. Using a historical case study methodology (Widdersheim, 2018) and qualitative document analysis (Bowen, 2009), we examined school board meeting content, online news articles, and state policy to analyze the financial changes that HISD underwent as they transitioned to a state appointed superintendent and school board during the first two years of the state takeover. Findings suggest patterns of concerning fiscal practices under the post-takeover administration. We make recommendations for local and state educational agencies that may improve financial transparency and solvency during state takeovers.

Keywords: state takeover, school finance, school budgets, Houston ISD, district finances

Introduction

In 2023, the Texas Education Agency (TEA) took control of the Houston Independent School District (HISD), the largest district in Texas and the eighth largest in the U.S., citing poor academic performance linked to issues at a single campus (Méndez, 2023). Since 1991, The Texas Education Agency (TEA) has taken over seventeen school districts statewide, citing concerns of insufficient academic performance or financial mismanagement. While TEA-appointed Superintendent Mike Miles insists the takeover will benefit students and families in HISD, the action has drawn backlash from the community (Hardy, 2023). Many educators and stakeholders in HISD have questioned the effectiveness of the new instructional approach in the district, and others have inquired about the expense of the takeover and whether Miles's approach will save taxpayers in the long run (Noel, 2023a; Walsh 2023a). Although most experts agree that state support is necessary in circumstances of egregious financial mismanagement or habitually poor academic performance, others have challenged the idea that state takeover will provide lasting results for the district (Schueler & Bleiberg, 2021; Hayes et al., 2021). This historical case analysis of the TEA takeover of HISD contributes a detailed account of the financial implications of state takeovers to inform this ongoing debate.

Problem Statement

Given the literature on past takeovers and the political turmoil surrounding the takeover of HISD, this paper seeks to explore the financial transparency practices of state and district leaders during the state takeover of HISD in real time. Although TEA typically enforces strict financial reporting standards for local districts (Hardin, 2016), local leaders and community members in Houston argue

that the state-appointed superintendent and board of managers (BOM) have neglected to follow these standards (Mizan, 2024; Noel, 2023a; Sessions, 2023). This raises questions regarding fiscal transparency and solvency. A close look at several months of budget decisions within this single case shows the financial strategies used to close a sizable budget deficit and increase academic achievement. Overall, this analysis provides valuable information for stakeholders and policymakers to consider during the state takeover process.

Literature Review

A state takeover of a local school or school district occurs when a state education agency identifies a district as failing and unfit for local governance. A failing school is defined differently based on each state's education code, but most states find a takeover necessary in cases of persistent academic failures, noncompliance, or financial challenges (Schueler & Bleiberg, 2021; Schueler et al., 2023). Under state takeover, locally elected school board members relinquish their governing power to the state (Morel, 2018; Schueler et al., 2023). State leaders then appoint a new superintendent and board of managers to oversee the district during the takeover period.

In Texas, the Legislature passed House Bill 1842 (2015), which streamlined the takeover process for the TEA. Under HB 1842, a district with at least *one* campus that does not receive a sufficient accountability rating for five consecutive years must either close the failing campus or face state take-over (Legislative Budgeting Board, 2018). In 2022, although the HISD received a "B" rating on the state's A-F scale, the struggles of a single high school gave Texas cause to take over the entire district (Strauss, 2023).

Budget Transparency & Accountability Reporting

Scholars largely agree that school budgeting and expenditure transparency are positive practices that increase public accountability and foster trust between schools and communities (Hardin, 2016; Roza, M., Hadley, L., & Jarmolowski, H., 2020; Jefferson, 2005). The federal Every Student Succeeds Act (2015) also supports fiscal transparency by requiring states to report per-pupil expenditures for public schools and local educational agencies (LEAs) (U.S. Department of Education, 2017). In Texas, the TEA tracks schools' financial accountability through the Financial Integrity Rating System of Texas (FIRST). This rating system follows the Texas Education Code (TEC), Chapter 39, Subchapter D, "Financial Accountability," which requires schools to share development and implementation plans, resource allocation practices, projected deficits, and corrective action plans (Texas Education Code, n.d.). Texas requires districts to post their budgets in a user-friendly format that is accessible and straightforward. The state also mandates that budgets be posted on the district's main website using plain language and detailed categorical breakdowns of expenditures (Hardin, 2016). These practices are crucial for building community engagement and trust, particularly during a state takeover of a local school district, when crucial decision-making powers are transferred from central district offices to the state (Childs et al., 2023).

Opponents of appointed school boards argue that takeovers reduce budget transparency and accountability and that removing local control during these transitory periods diminishes the overall impact of a state takeover (Ravitch, 2010; Welsh et al., 2019). Although Texas has a history of relatively high accountability and transparency requirements for districts to adhere to, community leaders have attacked Miles and his BOM for their continued lack of transparency during the first two years of the state takeover. (Mizan, 2024; Noel, 2023b; Sessions, 2023). Confusing fiscal plans

and inconsistent funding decisions have raised further concerns from parents and community members about the district's transparency practices (Walsh, 2023a). Journalists have argued that transparency during the Houston ISD takeover is essential, considering the local backlash state leaders have received (Dunlap, 2023c).

Prior Research on State Takeover and Fiscal Management

In this section, we offer several examples of state takeovers: North Forest, TX; Newark, NJ; New Orleans, LA; and Detroit, MI. These represent some of the frequently studied takeovers of large urban districts in the literature and highlight issues with transparency in the management of funds. These cases also offer valuable insight into the possible financial consequences of state takeovers.

North Forest Independent School District, Texas

In 2008, TEA took over North Forest ISD due to "financial mismanagement" (Alexander, 2023; Smith, 2012). Before the takeover, NFISD had an $11 million deficit and was nearing bankruptcy (Smith, 2012; Dellinger, 2023). The district illegally spent 13.3 million dollars from a voter-approved bond, funds reserved for constructing campus buildings (Smith, 2012). Instead of resolving this financial mismanagement, the appointed board continued to engage in poor fiscal practices. They spent $18,000 on central office renovations, including a 114-gallon aquarium (Mellon, 2011; Smith, 2012). Additionally, student enrollment dropped during the takeover, reducing the district's revenues. Ultimately, TEA annexed NFISD to HISD amidst continued financial and academic shortcomings (Aiyer et al., 2013). TEA could not improve North Forest's financial situation, handing it over to Houston ISD, which TEA has since taken over. The North Forest case highlights how state takeovers may not result in improved financial practices.

Newark, New Jersey

In 1995, the New Jersey Department of Education became the first state in the nation to take over a school district when it assumed control of Newark Public Schools (NPS), citing the district's persistent educational challenges (Oluwole & Green, 2009). Soon after, the state-appointed superintendent gained authority over critical aspects of the district's operations, including budgeting, personnel decisions, curriculum, and overall management (Wilson & Latham Sikes, 2020).

During the takeover, the state-appointed leaders spent millions of dollars over their approved budget year over year (NYT, 2000). The district accumulated a $58 million deficit under the state-appointed superintendent during the first five years, necessitating a bailout package from the New Jersey Department of Education (NYT, 2000). Newark Public Schools also accepted private donations that were "shielded from public scrutiny," including a $100 million matching donation from Mark Zuckerberg to create the Foundation for Newark's Future (FNF) in 2010 (Garfield, 2018; Morel, 2018, p. 119; Chin et al., 2019). This lack of transparency proved an issue, as the FNF did not adequately engage with the local community to determine how the funds would be used. With a five-year timeline to spend the $200 million, the FNF shut down in 2016 (Garfield, 2018). The NPS case is important because it lasted for over two decades, offering a longitudinal perspective of the fiscal practices and outcomes of state takeover (Friday, 2018; Wilson & Latham Sikes, 2020).

New Orleans, Louisiana

Before Hurricane Katrina in 2005, the Orleans Parish School Board (OPSB) was plagued by financial mismanagement and underperformance (Amparbin, 2020; Lewis, 2010). In the wake of the devastating storm, the state established the Recovery School District (RSD) to manage and improve every school in the city (Mitchell, 2018). The RSD implemented various reforms, including charter school expansions, significantly changing the city's education landscape.

During the 13 years the district was under RSD control, state-controlled charter management organizations (CMOs) violated open-meeting laws, frustrating local community members who felt they were being shut out of crucial decision-making for the district (Jabbar, 2015; Whirty, 2015). The privatization of the district further impeded transparency. The new charter schools accepted large philanthropic donations, which proved difficult to track due to inconsistent reporting practices (Jabbar, 2015). Many school leaders also felt that this increased competition needed more transparency, as the RSD awarded charters or closed schools in the district without adequate explanation (Jabbar, 2016). The community strongly opposed efforts from the state-appointed superintendent in 2015. Many argued that these proposed changes were part of a larger transparency issue the district was facing. (Jabbar, 2015). This further perpetuated the mistrust the state takeover had created.

The result of the RSD takeover showed an overall increase of $1,358 for per-pupil expenditures (Buerger & Harris, 2017). However, the majority of this was explained by a significant increase in administrative spending and offset by large declines in instructional expenditures (Buerger & Harris, 2017). Sadly, while teachers make more in New Orleans today than before the takeover, these increases are also offset by declines in overall teacher experience and reduction in benefit payments (Buerger & Harris, 2017). Before OPSB returned to local control in 2018, every school in the district was converted into a charter school, undermining the democratic process in the district (Buras, 2011). Therefore, the state takeover's results on the district's financial transparency remain unclear as charters are not subject to the same state scrutiny as public schools.

The case of OPSB and RSD offers important insights into the public mistrust that can result from state takeovers. In particular, closed board meetings remain a regular issue for districts under state takeover (Carroll et al., 2023; Dolan, 1992; Rogers, 2012). While each state has unique laws about what happens in a closed board meeting, district leaders are usually held to an honor system without proper checks and balances (Dunlap & Carlin, 2024). These practices silence community voices from decision-making processes and disrupt transparent governing practices often mandated by the states.

Detroit, Michigan

Detroit Public Schools faced numerous challenges, including declining enrollment, financial mismanagement, and academic underperformance during its 2009 takeover. Although the Michigan Governor appointed an emergency manager to improve financial transparency, state intervenors are exempt from open access laws in the state. Thus, as the state education agency took over the district, the state managers did not have to report all decisions and transactions. Michigan's exemption clause meant that individuals could make critical decisions about school management behind closed doors without input or scrutiny from the public or other stakeholders.

Though the state take-over aimed to improve financial management and promote transparency, Michigan's efforts to solve the economic problems through short-term fixes resulted in an additional $299 million in long-term debt, plus interest costs of $52 million (Levin, 2019). Finally, in 2016, the Michigan Legislature approved a $617 million restructuring plan to address the district's debt and academic issues, effectively splitting DPS into two entities (Levin, 2019). The state takeover of Detroit public schools lasted over 15 years and left schools significantly worse off (Levin, 2019; Wilson, & Latham Sikes, 2020). School buildings crumbled and fell into disrepair, the school district almost went bankrupt, and student performance did not improve.

Overall, these cases demonstrate that state takeovers in other major metropolitan areas have yielded a poor return on investment. The positive impacts of state takeovers remain elusive (Nelson, S. L., 2017). As we look to the future, these cases highlight areas of concern and potential ramifications of the takeover in HISD.

Methodology

For this study, we employ a historical case study methodology to analyze the financial changes that HISD underwent as they transitioned to a   state-appointed superintendent and school board during the first two years of the state takeover (Widdersheim, 2018). We define our case of study as Houston ISD, with data covering the year leading up to the state takeover   and the two years into the takeover. Our data sources included video recordings, transcripts, and published records from HISD school board meetings and budget workshops from January 2023 through the end of the 23-24 school year. Online news articles were used to understand community voices and local responses to the state takeover. Legal documentation, including state congressional bills and accountability codes, was retrieved from the Texas Education Code and the Texas Legislature to offer policy context. Documents from HISD's official website were also used to support our historical analysis of past and current practices in the district.

Using a qualitative document analysis (Bowen, 2009), we organized our data sources to align with the takeover timeline. We then systematically analyzed changes in the district's budgeting documents to track revenue and expenditures. We compared these changes to the information disseminated by the district through press releases, public meetings, and website documents. Our goal was to understand how funds were spent, how these expenditures differed from the years before the takeover (considering new policies, revenue changes, and shifting budget priorities), and what transparency practices the new Board of Management (BOM) used to communicate with the local community.

Researcher Positionality

We are current and former educators who examine power and privilege in education finance and resource allocation policies across K-12 settings. Our collective experiences have shaped our approach to this research topic as we continue to explore the importance of local control in public education. Our research advocates for transparency and accountability practices in school finance policy. These views guide our analysis of findings in the following sections.

Findings

We organize our findings sequentially beginning with HISD pre-takeover and continuing to the first and second years of the takeover. Within each section, we outline district spending and budget cuts.

Houston ISD Pre-Takeover

TEA took over the Houston Independent School District (HISD) after one high school received a failing accountability rating for five consecutive years, not due to financial mismanagement (Strauss, 2023). On the contrary, the elected board had consistently received annual awards from the Government Finance Officers Association (GOFA) and the Association of School Business Officials (ASBO) Certificate of Excellence in Financial Reporting (HISD, 2023a). The Financial Integrity Rating System of Texas (FIRST) also rated the former elected board a 96 out of 100 for the 2022-2023 SY (FIRST, 2024). They regularly engaged community members in decision-making and published reader-friendly budget documents to summarize meetings, demonstrating financial transparency. Unfortunately, like most Texas public school districts, HISD was in a financial bind due to decreasing enrollment and low average daily attendance (ADA) since the COVID-19 pandemic, the end of the Elementary and Secondary School Emergency Relief (ESSER) Fund, and skyrocketing inflation (Edison, 2024). As a result, the elected board proposed budget changes to avoid a shortfall. Otherwise, they would need to tap into the unallocated, or rainy-day, funds by FY 2024 (HISD, 2023b).

In the months leading up to the takeover, the elected school board of HISD prepared the fiscal year (FY) 2024 budget. They hosted budget workshops on February 16th, March 23rd, May 4th, and May 18th, 2023 (HISD, n.d.). On February 16th, they reviewed the adopted budget for FY 2023 and proposed changes for FY 2024 (HISD, 2023b). They outlined a plan to preserve their unallocated funds. Former elected school boards had required at least a 3-month reserve, which, in FY 2022, amounted to $466 million. As of April 30th, 2023, HISD had over $644 million. Previously, HISD tapped into unassigned funds to stay afloat after Hurricane Harvey destroyed multiple schools (HISD, 2018). Although the unassigned funds balance exceeded the minimum, it seemed prudent given HISD's geographic context.

To increase revenues and preserve the unallocated funds balance, the HISD school board proposed pursuing a Voter-Approval Tax Rate Election (VATRE) for a 3-cent tax increase per $100 of property value (HISD, 2023b). These funds would not be subject to the state's recapture policy, which redistributes local tax revenue in an effort to equalize school district funding (Alemán, 2007; McDonnell & Elmore, 1987). Before the February budget workshop, property values had skyrocketed in Houston, and the property tax rate had decreased. HISD's revenue increased due to the overall increase in property taxes, but it also owed more in recapture payments (HISD, 2023b). This left the school board in a bind to create revenue exempt from recapture.

Next, the elected board proposed changes to its resource allocation model, which determines the funding each school receives from the district (HISD, 2023b). HISD adopted a weighted student funding (WSF) model in the late 1990s to increase the autonomy of individual principals (Moon, 2018). First, each school receives a weighted "per unit allocation" or PUA based on enrollment and ADA (HISD, 2023b). There are additional weights for special populations, which are proportional to what the district receives from the state. Then, schools can receive non-weighted funding, such as the small school subsidy (SSS) and high school allotment (HSA). During the February budget workshop, the board proposed standardizing the SSS to save an estimated $7.4 million (HISD, 2023b). It also planned to reduce the HSA. Before FY 2020, the state had provided the HSA to

districts. HB 3 ended the allocation, but HISD continued providing equivalent funds to its high schools. The board estimated it could save $4.9 million by cutting its HSA in half, from $170 to $85 per high school student (HISD, 2023b). As a last resort, the board discussed the possibility of funding model reductions or cuts to the PUA, but it hoped to avoid that (HISD, 2023b).

Furthermore, the elected school board hoped to stabilize the steadily decreasing enrollment patterns the district was facing since the 2016-2017 school year, when enrollment had dropped by nearly 12% (González-Kelly, 2023; Goodwin, 2024). The district was also looking to improve attendance scores across the district (HISD, 2023b). Both had fallen since the onset of the COVID-19 pandemic, leaving the district with financial worries. The state initially held school districts harmless for low ADA during the pandemic but ended the practice by FY 2023, causing HISD to receive less state funding. "Hold Harmless" is a support plan by the TEA to help districts that have suffered from low ADA and enrollment rates throughout the COVID-19 pandemic and recovery years. Under Hold Harmless, districts would not be financially penalized for decreasing ADA and enrollment rates (Office of the Governor, 2021). Nevertheless, HISD continued to hold its schools harmless from their ADA losses through its resource allocation model. This worsened the shortfall for the district, so the board planned to end its version of hold harmless for FY 2024 (HISD, 2023b; (HISD, 2024f)). The elected school board also proposed cutting $20 million from HISD's central office to improve the district's financial situation.

Year One Under Takeover

TEA appointed Mike Miles as superintendent of HISD in June of 2023. Miles previously served as the Dallas Independent School District superintendent, a position that he left early (DMN, 2015). His three-year superintendency in Dallas was characterized by overspending. Specifically, Miles overpaid his leadership team and initiated two costly programs with mixed results: a college and career readiness program called Destination 2020 and a school improvement program called Accelerating Campus Excellence (ACE) (DISD, n.d.; Hacker, 2015; McNeel, 2018; Northern, 2023; The Hub, 2014). Destination 2020 did not achieve its goals and, although ACE proved more successful, the test score gains made at early ACE campuses plateaued or backslid after funding ended (Morgan et al., 2023). His successor called ACE "unsustainable going forward" (Smith, 2020). Miles' history of over spending in Dallas made him a surprising choice for the takeover given that HISD was facing budget challenges.

Heading into the 23-24 school year, school districts across the country faced a financial slump as ESSER funds ended. Like other school districts, ESSER resources kept HISD afloat during the pandemic years to counterbalance the loss of average daily attendance (Edison, 2024; HISD, 2024g). In October 2023, HISD reported a drop in enrollment of about 6,000 students. Within the 85 NES schools, the decline hit ~5%, while non-NES schools saw a ~1% decline in student enrollment (Menchaca & Goodwin, 2024). Because funding is generated based on ADA, this enrollment decline equated to a district funding decline. Nevertheless, in June 2023, Superintendent Mike Miles and his appointed BOM redistributed funds, cut positions, and raised expenditures to implement their New Education System (NES).

HISD began the 23-24 school year with a reserve balance of $900 million. Miles's administration criticized the former district leaders for hoarding excess funds because state law only required HISD to maintain $484 million in reserves (HISD, 2024c). The exact reason HISD was holding onto this excess reserve is unclear. However, the elected board may have anticipated a decrease in revenue due

to HISD's declining enrollment and loss of federal funding. Additionally, recent changes to Houston's property tax revenue cap and Texas' Homestead Exemption Act have decreased the district's total revenues (Julot et al. 2023). In short, maintaining a reserve balance may have been a strategic choice to support the district's future (Noel, 2023a).

Increased Expenditures in Year One

With an adjusted $2 billion budget for the 23-24 SY, HISD was expected to spend just under $2.3 billion: roughly $270 million more than their anticipated revenue (Noel, 2023a). Miles maintained that the district was spending within their means, but the press questioned the level of public accountability because the BOM held many closed sessions during board meetings, produced vague answers for the community, and contradicted its promises (Dunlap, 2023a; Dunlap, 2023b).

Particularly notable increases in expenditures resulted from the implementation of the NES, which cost the district around $96 million in "one-time costs in 2023-2024 for NES technology, furniture and equipment" (HISD, 2024e; p.37). They also spent $221.6 million dollars of regular district revenue and $59 million of ESSER III funds during the 2023-2024 school year to cover additional NES expenses (HISD, 2024h). The district projected spending $253.3 million on NES in 2024-2025 (HISD, 2024e). These changes included competitive teacher salary increases ($30k over the state average), stipend incentives, new curricula and wrap-around services across the district. Additionally, HISD committed to purchasing new curriculum materials to support non-NES "C and D rated" schools in the district to help improve outcomes (HISD, 2024b). While these programs can produce beneficial outcomes (Hanushek & Rivkin, 2007; Hill, 2020), Miles also spent on items that teachers and staff considered wasteful, such as a $470,000 one-off musical production at the 2023 HISD convocation (Walsh 2023b). The NES system continues to face backlash on curriculum, surveillance, and new discipline measures. Miles implemented intense monitoring and high-stakes accountability systems. His requirement to add webcams into every classroom cost HISD $254,000 (Menchaca, 2024a).

While Miles increases surveillance and accountability for campus leaders, NES principals have lost central control over their schools (Dunlap & Lehrer-Small, 2023). The new BOM now determines the district budget and the 130 NES school budgets. Heading into the 24-25 school year, the district planned to include at least 45 additional schools into this NES model, giving Miles further power over HISD's finances (HISD, 2024e).

Proposed Budget Cuts for Year Two

Miles promised to reduce spending in 2024-2025 and warned that many non-NES schools could face up to a 12% cut in their budget (Lehrer-Small, 2024b). These cuts were geared towards offsetting declining student enrollment. These cuts were anticipated to save the district $15 million in the 24-25 SY. The C & D rated non-NES schools that were not already using an "approved high-quality curriculum" were given the ultimatum of adopting the NES curriculum for free or choosing an external provider and using their depleted budget to pay for half the cost of the curriculum (HISDb, 2024, p.1).

In February 2024, the BOM released a 31-page Efficiency Report that attacked the formerly elected board for its mismanagement of funds (HISD, 2024c). The report listed eight key areas they planned

to overhaul: unaligned and ineffective budget processes, overreliance on purchased services, inability to track and manage employee work arrangements, low expectations and oversight of employee attendance, ineffective processes for recruitment & hiring staff, dysfunctional transportation system, highly decentralized system of autonomous schools without commensurate accountability, and no unifying vision of high-quality instruction or high-quality programming. The Efficiency Report detailed their plans to overhaul these problems, including a cut to "approximately $50 million in purchased services" and "doubling the number of students per bus" (HISD, 2024c, p.21, p.10).

Before the budget's release for the 2024-2025 SY in May of 2024, there was uncertainty surrounding its expected contents due to the lack of transparency. The appointed BOM had multiple "closed meetings" in the spring of 2024, during which they may have discussed the budget (HISD, n.d.a). Conflict erupted when the district retracted a $2,500 pay incentive for non-NES teachers originally included in their 2024-2025 compensation plan due to "budget constraints" (HISD, 2024d; Menchaca, 2024b, p.1; Menchaca, 2024c). While the BOM maintained that these cuts were necessary to achieve state goals, an April 2024 report found that Miles had been increasing the salaries of his top employees during this same period. Under Miles, 37 employees made over $200k, up from just $12k during the 22-23 SY (Goodwin & González-Kelly, 2024).

Early in 2024, Miles announced his goals to keep the fund balance above $850 million, slow down spending for the 24-25 SY, keep cuts away from wraparound services, prevent campus closures, and simultaneously reduce the staggering district deficit (Lehrer-Small, 2024a; Lodhia, 2024; Walsh, 2024). Miles was unable to keep these promises. By early May of 2024, Miles announced job cuts for 300 wraparound resource specialists (Zuvanich, 2024a). On May 15th, during a community Zoom meeting hosted by the Houston Chronicle, Miles stated that they would keep cuts away from the classroom (class sizes will remain the same, magnet programs will remain untouched, and high-quality instructional materials will still be provided) (Houston Chronicle, 2024).

Year One Accountability Ratings

Preliminary data shows that HISD expects to receive a "C" rating for the 2023-2024 SY, although official accountability data is "pending and subject to change based on judicial rulings" (HISD, n.d.b, TEA, n.d.). If correct, this would indicate a fall from a "B" in 2021-2022, the last year with an official rating from TEA. The HISD Accountability Dashboard does not acknowledge this; instead, it compares the data to the 2022-2023 SY, which is also under review by TEA. It also claims large increases in the number of "A" and "B" schools and decreases in "D" and "F" schools, especially for NES schools, from 2023 to 2024 (HISD, n.d.b). However, TEA has not validated this.

Year Two Under the Takeover

HISD faced considerable budget challenges heading into the 2024-25 school year (HISD, 2024f). Non-NES schools had lost 6.5% of their students, while NES schools had lost 12% which exacerbated budget shortfalls due to lost revenue (Zuvanich, 2024d). The district also faced record-breaking teacher turnover at the beginning of the 2024-2025 SY, when more teachers were terminated or resigned in June than in the entirety of any previous school year (Mizan & Goodwin, 2024). Teacher turnover is notable because it is financially draining. Replacing teachers can cost districts as much as $25,000 per teacher (Learning Policy Institute, 2024). As of November 2024, HISD has not shared how it will address issues with teacher attrition.

Budget Cuts and Failed Bonds in Year Two

As anticipated, HISD reduced bus routes for the 2024-2025 SY. This change saved approximately $3 million, substantially less than the expected $25 million (HISD, 2024c, p.21; Zuvanich, 2024b). Moreover, the new system reduced bus access for magnet students and students otherwise attending a school other than their zoned school and failed to provide a route to 700 students by the first day of school (Zuvanich, 2024b; Zuvanich, 2024c). The district is still working on additional changes to reduce transportation costs (Zuvanich, 2024b).

In 2024, Houston ISD asked voters to pass $3.960 billion in bonds to renovate, expand, and build existing school buildings and $440 million for "technology equipment and systems, technology infrastructure, instruction technology." (HISD, 2024a). Approximately 58% of voters rejected these measures, citing a lack of trust in the appointed board (Lee, 2024; Zuvanich, 2024e). As a result of the failed bonds, the BOM discussed selling 18 properties to create more revenue during a closed meeting on November 14th (Zuvanich, 2024f).

Policy Recommendations

Based on this close examination of the fiscal practices during the HISD state takeover, we offer several recommendations for state and local educational agencies. These may support transparent and accountable financial decision-making for district and state-level policymakers engaged in a state takeover of a local school or school district.

District

Our analysis shows that the actual and perceived lack of transparency in budgeting by the BOM contributed to public mistrust and unsustainable budget decisions under HISD leadership following state takeover. Therefore, to build trust during state takeovers, we first recommend that state-appointed leaders engage in transparent budget planning by hosting budget workshops for the public early and often. For instance, the pre-takeover elected board shared their first budget planning documents for the 2023-2024 SY in February of 2023, while the appointed board did not share any until May of 2024 (HISD, 2023b; HISD, 2024e). This delay may have contributed to budget mistrust. We further recommend that district leaders include plain language materials published on schools' websites, such as is required under the FIRST accountability system & the Texas Education Code. These two actions may help promote community members' involvement in budget-related decision-making which may improve the district's fiscal responsibility, such as by avoiding costly convocation performances and reducing bloated administrative salaries. It may also help ensure that schools receive equitable amounts of funding rather than overspending at some schools and cutting budgets at others (e.g., NES and non-NES schools).

State

Our recommendations at the state level concern funding for at-risk districts and accountability for state-appointed leadership during state takeovers. The HISD case shows how inadequate funding may contribute to the poor performance, which precipitates a state takeover. Currently, 17% of Texas school districts are "severely" underfunded, with 73% of the state's school districts experiencing "funding needs that exceed their actual per-pupil funding." (Turley & Selsberg 2024, p.3). However, state takeovers do not address this underlying issue (Bauman, 2023). Therefore, we

recommend that state legislatures raise the basic allotment to districts, especially those in areas serving disadvantaged students. These resources may help attract better teachers and improve instructional offerings,   which could help LEAs avoid state takeover. Research has shown that investing more money into school academic programs can significantly impact student success (Hardin, 2016; Jefferson, 2005).

Finally, state legislatures and state educational agencies should expand accountability and transparency reporting for districts under a state takeover. Transparency, particularly during the transition of governing powers, is crucial to maintaining public trust, ensuring accountability and the efficient use of taxpayer funds, and supporting equitable resource allocation practices (Hardin, 2016; Roza, M., Hadley, L., & Jarmolowski, H., 2020; Jefferson, 2005; Nelson, S. L., 2017). Moreover, accountability systems may help determine the conditions under which districts will remain open and local control may be restored. This is important considering that, of the 15 takeovers before HISD, four school districts were closed permanently, and two districts still have state-appointed managers in place (See Appendix).

Conclusion

This historical case analysis of the financial management of HISD during state takeover occurred in real-time, and the state takeover of HISD continues. We show how financial practices under state takeovers can contribute to public mistrust and poor financial   decision-making.
Future research might focus on spending during the 2024-2025 SY and budget planning for the 2025-2016 school year, especially without the bond measures and as funds dwindle after the first year of the takeover (Lehrer-Small, 2024c). Future research may also center community voices and explore local responses to the takeover, financial decisions by the appointed BOM, and the failed bond measure.

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Note: The second and third authors are listed alphabetically rather than by order of contribution.

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Appendix

Figure 1

Texas School District Takeovers Since 1991

School District	Status
Kendleton ISD	Closed permanently
La Marque ISD	Closed permanently
Wilmer-Hutchins ISD	Closed permanently
North Forest ISD	Closed permanently; annexed by HISD
Beaumont ISD	Open - local control restored after takeover
Edgewood ISD	Open - local control restored after takeover
El Paso ISD	Open - local control restored after takeover
Southside ISD	Open - local control restored after takeover
Harlandale ISD	Open - settled - no board of managers appointed
Hearne ISD	Open - settled - no board of managers appointed
Pearsall ISD	Open - settled - no board of managers appointed
Progreso ISD	Open - settled - no board of managers appointed
Snyder ISD	Open - settled - no board of managers appointed
Houston ISD	Open - still under TEA control/appointed board of managers
La Joya ISD	Open - still under TEA control/appointed board of managers
Marlin ISD	Open - still under TEA control/appointed board of managers
Shepherd ISD	Open - still under TEA control/appointed board of managers

Note. This table provides information about the status of school districts in Texas taken over by the Texas Education Agency (TEA) since 1991. It is adapted from "*With an HISD state takeover looming, here's how the TEA has taken over other Texas school districts*" by H. Dellinger, March 6, 2023, Houston Chronicle. https://www.houstonchronicle.com/news/houston-texas/education/article/tea-takeover-state-hisd-houston-school-district-17818226.php

A New School Discipline Fulcrum:
Identifying and Rectifying

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A New School Discipline Fulcrum: Identifying and Rectifying

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When this special issue was originally conceived, it was intended to offer a landscape view on the issue of school discipline. At that time, post-pandemic opportunities for ending exclusionary and racially discriminatory discipline policies were top of mind, particularly in light of state efforts to revert back to punitive approaches. The pieces featured in this issue have been selected purposefully to point to new areas of needed change and alternatives to exclusion. Many of these pieces prioritize Black children and offer aligned frameworks, while explicating racially oppressive and anti-Black systems. As this special issue went to press, we witnessed, alongside all of you, the swift and systematic attempts of the U.S. President to end any and all efforts to address race and racism in schools, and the nation more broadly. We anticipate that the federal government will move backwards on issues of school discipline, making it all the more important that local and state groups continue with these efforts. The works herein provide both insights and frameworks that can help inform such efforts. And, this special issue may also come to reflect, as special issues do, a particular historical moment in time, one that we hope preceded *more,* not less, state and local action to end racially disproportionate and exclusionary school discipline.

School officials continue to utilize punishment despite the conflict between these means and established best practice for children and youth (APA, 2008). Nearly 50 years of research echoes what many impacted already know: the way K-12 education "does discipline" is ineffective and counterproductive succeeding only in pushing out students of color and students experiencing poverty (Edelman et al., 1974, 1975; Leung-Gagné et al, 2022; Williams, 2024). And, no matter how you cut it, exclusionary discipline in its many forms continues to disproportionately impact the lives of Black children, adolescents, and family members who bear myriad associated costs (Bell, 2021; Darling-Hammond & Ho, 2024). These ongoing patterns are alarming, as countless studies have concluded that exclusionary discipline (i.e., suspensions, corporal punishment, and expulsions), do not promote pro-social behavior and adversely impact youth outcomes (Welsh & Little, 2018).

The premise that exclusionary school discipline has rested upon – that imposing penalty or sanction in some way benefits students or schools – has long been faulty. It is time to put this outdated way of thinking to rest. Schools are in need of a paradigm for "doing discipline," essentially what is needed is a *new school discipline fulcrum,* one resting upon different assumptions, namely: (1) continued efforts to identify patterns of exclusion (and in an era where race-consciousness is being politically suppressed there is the need for continued, explicit, identification of race and gender patterns) and (2) the importance of rectifying, or making right identified forms of harms, disparities, and the dispossession of generational inequalities stemming from unequal discipline (Conwell, 2016). The authors featured in this special issue offer insights on both fronts, identifying school discipline concerns in new areas and offering promising frameworks for rectifying the current pushout fulcrum, including addressing the anti-Black roots underlying much of schooling.

Identifying

What is commonly examined in public schools is spotlighted by Willis and Miller in a different setting: private religious schools. In "*Broken Windows Schooling: A Qualitative Case Study of the*

Disciplinary Experiences of Black Males in a Predominately White Christian School," the authors explore the experiences of Black boys in a predominantly White Christian School where, despite adhering to Judeo-Christian values and teachings, racism permeated educators' decisions towards Black boys in the school, resulting in disproportionate discipline. This "broken window" schooling left Black students with little willingness to invest into the school itself, and forced them to survive, rather than supporting them to thrive. The authors conclude with organizational practices that the school could undertake to change conditions and support Black children.

Along similar lines, Neal-Jackson in *"Restorative [In] Justice: Why Schools Struggle to Implement Restorative Justice for Black Girls,"* poignantly examines one school's attempt to utilize restorative practices in the school. While the approach to use this framework was evident, Neal-Jackson summarizes how the lack of fidelity and training opened a portal that jettisoned Black girls specifically out of the classroom and into alternative education programs. This article showcases how "good intentions" and supposedly neutral frameworks (restorative justice) are not enough to surpass the pervasive nature of racism and sexism within the dispositions of educators, who could not see these girls as innocence personified. Neal-Jackson eloquently addresses the need for educators to get beyond themselves, to question how they interact with Black girls overall, and to interrogate their own unwillingness to carry out frameworks intended to prevent children from being disproportionately disciplined in schools.

Saldaña and Guan's innovative study uniquely examines security expenditures and, in doing so, injects larger education resource arguments into a research field often myopically focused on student behavior. In "*Examining Trends and Patterns in K-12 Security Expenditures in Texas*," the authors analyze how spending for school security in Texas has changed over 15-year period. They find a significant increase in security expenditures statewide and that this growth outpaced increases in spending on other support services like health, social work, and counseling. Additionally, Saldaña and Guan find that districts serving the highest percentages of students of color and economically disadvantaged students consistent spent the most on school security. The authors' work points to contradictions of school funding investments and provide insights into education resource patterns underlying the disproportionate punishment of students of color.

Rectifying

In addition to identifying new areas of concern in today's school discipline landscape, several authors offer ways to rectify harmful discipline and the anti-Black ideology embedded within them. Scholars Jackson and Carter in *"Restoring the Land: Pro-Blackness as a Healing Force"* explicate pro-Blackness in K-12 classrooms and its dimensions. The authors focus on healing as a vehicle for justice and a framework rooted in *African Diaspora Literacy* as a way to shift classroom management into a supportive force for Black children. While rejecting the notion that school discipline must be rooted in punitive, often Eurocentric patterns, these authors categorize school discipline as a mechanism to affirm Black culture, Black students, and foster a holistic paradigm that elevates social, cultural, and academic growth in Black students.

Along similar lines as Jackson and Carter, Svajda-Hardy and Kwok in *"Extending Culturally Responsive Classroom Management to Enhance Contemporary Classrooms: A Conceptual Framework"* unpack Weinstein et al.'s (2003) Culturally Responsive Classroom Management (CRCM) framework in a way that offers further clarity on the execution of the framework. They contend that often educators extract pieces of the framework to use in the classroom. By piecemealing the framework, the utility of the

framework diminishes which results in educators transitioning back to punitive school discipline approaches. The authors offer tangible recommendations for the execution of this framework by parsing out the framework, offering scenarios for each tenet, and contending that educators must address all elements of the framework, simultaneously, for culturally responsive classroom management to be effective. This rearticulation of CRCM illuminates the importance of practitioners and scholars' reflexivity.

Lastly, Wiley, Williams, and Simmons in "*From Slow Reform to Meaningful Abolition: Exclusionary School Discipline and the Need for a New Paradigm* the authors summarize and critique recent discipline reform movements, calling attention in particular to the inadequacy of reforms to eliminate disproportionate discipline for Black children and youth. In concert with other abolitionist thinking on the issue (Davis, 2003; Kaba, 2021; Love, 2023), the authors argue that exclusionary discipline has become a taken for granted norm, allowed to persist as an available option for educators to rely on. The authors challenge policymakers to eradicate exclusionary discipline at the federal, state, and local levels so as to finally remove the legislative and policy options that permit ongoing pushout and discrimination.

In closing, identifying the effects of punitive practices of minoritized students, categorizing inappropriate and appropriate forms of school discipline and rectifying frameworks and approaches to sustain affirming school discipline practice is a continuous endeavor. An endeavor rooted in the belief that all students need the opportunity to learn without being heavily penalized for mistakes. Schools should not be factories that pushout students, nor should they be arenas that test failed reforms to the detriment of students' learning opportunities. Pivoting away from antiquated approaches requires a bold shift away and a complete refrain from any approach that was developed with the intent to remove marginalized groups out of the classroom. For if we truly want to ensure that each child can enter school met with dignity, the landscape of school discipline must change.

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Dr. John A. Williams III, an urbanist educator and an Assistant Professor in the Department of Teaching, Learning and Culture at Texas A&M University, has a distinct focus on establishing affirming practices, policies, and procedures aimed at eradicating exclusionary school disciplinary measures for Black children. In tandem with this, his mission includes shedding light on more effective strategies for preparing and nurturing highly qualified teachers and teacher candidates for urban educational settings. With an impressive track record of nearly 50 publications, including 43 peer-reviewed works in renowned outlets such as the Journal of Urban Education, Teacher and Teacher Education, Journal of Teacher Education, Urban Review, Journal of Higher Education, and a co-edited book titled "Reimagining School Discipline for the 21st Century Student," Dr. Williams heads the Urban Lab for Transformative Research and Assessment (ULTRA).

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Broken Windows Schooling:
A Qualitative Case Study of the Disciplinary Experiences of Black Males in a Predominantly White Christian School

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Broken Windows Schooling: A Qualitative Case Study of the Disciplinary Experiences of Black Males in a Predominately White Christian School

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Abstract

In this manuscript, we share results from a qualitative case study that analyzed the disciplinary experiences of four Black boys who attended the same predominantly white Christian school (PWCS). Our research on Black boys in PWCS provided critical insight into the ways in which school discipline is handled in contexts that have been under researched. To make sense of our data, we utilized BlackCrit Theory and antiblack misandry, which are rooted in the Black myths of disorder and chaos. The findings indicate that school discipline was a socially hostile event for Black boys because of its overtly punitive nature. Moreover, the school was rooted in white, politically conservative ideologies that had an antagonistic relationship toward urban pluralism. Thus, the disciplinary environment pinpointed individuals who behaved outside of the prescribed norms of the school. Ultimately, we conclude that the disciplinary norms of the school mirrors Broken Windows Policing Theory, which links Blackness with disorder and chaos.

Keywords: Black boys; Predominately White Christian Schools (PWCS), School Discipline

This past summer, I (Evan) took a group of Black teenage boys on a trip for a basketball tournament in Orlando near Disney World. The young men were members of my church and had never been in any serious trouble. One night we went down to Disney Springs, an outdoor complex of the theme park, to get some pizza. After being in the crowded venue for 15 minutes, a hostess yells at my players to be quiet because she was attempting to collect orders and they were being disruptive. As the chaperone, I was taken aback because everyone in line was being loud. Instead of making a general announcement about the noisiness in the restaurant, the hostess singled out seven Black boys. Of course, the players stopped talking as loud and the general noisiness of the establishment continued. This experience is a microcosm of Black teenage boyhood in America. Even at Disney, a place of wonder and amazement geared toward childhood experiences, the boys' behavior was unnecessarily policed because of an assumed social deviance and detrimental theorizations of Black life. The Black experience in America manifests under a carceral state of constant surveillance (Williams, 2024). The fact that the general noisiness in the establishment continued, but the hostess made no more declarations about it once these boys were silenced, suggested to me that they were targeted in this iconic fantasyland. Furthermore, it indicated that not even this fantasyland existed outside of the jurisdictional authority of the carceral state. In essence, there are very few domains where Black boys can escape carceral surveillance.

While carceral experiences are ubiquitous for Black boys, they manifest dominantly in schools through the disciplinary experiences of Black boys. For instance, during the 2017-2018 school year, Black boys made up 7.4% of the American public school population, but made up 24.9% of out of school suspensions and 25% of school expulsions (Department of Education, 2023). In other words, Black boys make up less than 10% of the student population, yet are penalized for over a quarter of American public schools' disciplinary infractions. While much has been written about the

disciplinary experiences of Black boys in public schools (Simmons, 2015; Coles, 2019; Bryan, 2022; Bryan et al, 2023), there is limited knowledge regarding their disciplinary experiences within predominantly white Christian schools (PWCS). One reason the experiences of Black boys in PWCS is under researched is because there is limited governmental oversight for these private religious schools. The limited research that is available suggests that Black boys are subject to harsh disciplinary practices in these educational institutions, similar to their experiences in traditional public schools (Willis, et al., 2024). For instance, Black boys in both traditional schools and PWCS report being disciplined more severely for doing the same thing as their white peers (Neal-Stanley, 2023; Wiley, 2021). Also, research has demonstrated that the racial makeup of the schools shapes the disciplinary environment and the visibility of the Black boys within the schools (Leath et al., 2019; Willis, 2022). Black male school discipline is rooted in the anti-black misandrist biases of teachers who assume that their Black boys are social deviants and hyper-sexual, incapable of controlling their sexual desires (Irby, 2014; Thomas III, 2024; Willis & Miller, manuscript submitted for publication).

We situate this research study in this educational landscape to ask: *What were the disciplinary experiences of the Black boys who attended a PWCS?"* This central research question is supported by a subquestion *"How did their disciplinary experiences shape their perceptions of the disciplinary environment?* We use Black Critical (BlackCrit) Theory and anti-Black misandry to theorize findings from a qualitative case study with four Black boys who attended a PWCS during the 1990s. While BlackCrit Theory prioritizes the how Black people in particular experience racism, anti-Black misandry demonstrates how historical notions of Black boys and men as *beasts of burden* echo through contemporary schooling experiences for Black boys in harmful ways. Our work supports the special theme of this issue by challenging the current landscape of school discipline for stakeholders with its attention on an under-researched, undertheorized aspect of schooling in the US: the disciplinary experiences of Black boys in PWCS. Moreover, we align this work with the special issue theme by suggesting paths forward for a justice-focused discipline construct. In the following section, we begin with a brief literature review of how the negative perceptions of Black boys in the white imaginary impact the disciplinary experiences of Black boys in schools.

Perceptions of Black Boys in the White Imaginary

Terms that have been used to describe Black boys are *superpredators, at-risk, defiant, disruptive,* or *violent* to name a few. Myths about *superpredators* and immoral Black households have a long history. These antiblack and misandrist myths derived from the era of U.S. slavery in which Black males were seen as dangerous and hyper-sexual (Kendi, 2016). Since slavery, Black males have been socially conceptualized as brutes who are intellectually inferior, but physically superior (Curry, 2017; Kendi, 2016). Christian thought leaders like Lou Giglio espoused ideas that slavery served a greater purpose because it introduced Africans to Christianity to redeem them from their inferior religious systems (Burke, 2020). This white Christian myth served as a justification for the violence of the American chattel slavery system that divided families, sexually assaulted African men and women, and reduced human beings to beasts of burden (Curry, 2017). In short, antiblack misandrist ideas developed as a means to justify the heinous nature of American chattel slavery, but these narratives did not die during slavery. They socially evolved for contemporary times. One vivid way this can be seen is in the present-day landscape of disproportionate racialized discipline in schools.

Black Boys and School Discipline

With deficit-based terms like *superpredators, at-risk, defiant, disruptive,* or *violent* used to describe Black boys, it is no wonder that during the 2017-2018 school year, Black boys made up 7.4% of the American public school population, but made up 30% of student mechanical restraints, 29% of school physical restraints, and 28.8 percent of school seclusions (Department of Education, 2023). In essence, Although Black boys make up 7.4% of the school population, they represent nearly a quarter of all exclusionary disciplinary actions and nearly a third of all restraints and seclusions. One could look at these statistics and conclude that Black boys are out of control. However, their overrepresentation in school discipline is largely a byproduct of teachers penalizing Black boys more punitively than their white male counterparts for similar infractions (Butler et. al., 2009; James, 2019; Noguera, 2008).

Inconsistent portrayals of Black masculinity abound from both research and popular media (Ladson-Billings, 2011; Thomas, 2024). For instance, Black boys have been painted as both violent and socially vulnerable (Dillulio, 1995; Moniyhan, 1965). Meanwhile, Black boys are simultaneously characterized by their low academic performance (which beckons much education reform) (Howard, 2014). They are both subjected to white pity while they are prey to pre-existing racial tropes about their limited capacity and potential. Within this backdrop of racial tropes, Black male school discipline is a normative component of American education. Black boys experience the harshest discipline of any demographic in the United States in large part because of the ways they are hyper-surveilled (U.S. Department of Education Office of Civil Rights, 2021) due to the way they are linked with crime and chaos in the white imaginary. One way to examine the hyper surveillance of Black boys in schools is through Kelling & Wilson's (1982) theory of broken windows policing. Broken windows policing posits that a key indicator of urban decay is when a community has broken windows that remain unfixed. Furthermore, in these communities, the theory purports that crime is more rampant and chaos is more likely to happen at any moment because the community and neighborhood is disorderly. Thus, communities like these need more policing and more surveillance to keep disorderly conduct and crime in check. Furthermore, policing in these environments is more aggressive and petty crimes are adjudicated more harshly because they attempt to squelch chaos (Muniz, 2015). This theory is useful when applied to the disciplinary experiences of Black boys in school as well because it offers insight on the disproportionate ways that Black boys are represented in in school discipline infractions (Simmons, 2016; Coles, 2019). While broken windows policing theory is explicitly geared to urban environments, we will demonstrate in our analysis of the data that, in the white imaginary, this can be extrapolated to mean that Blackness is synonymous with criminality.

Black Boys/White Teachers

Over and over, studies reveal that Black boys are disproportionately penalized because white teachers connote their skin with criminality (Williams, 2024; Zimmermann, 2024; Landsman, & Lewis, 2012; Wesley & Ellis, 2017; Coles, 2019; Johnson, 2019; Bryan, 2022). For example, Zimmermann (2024) found that Black boys were targeted by their elementary school white teachers who looked for Black students to do bad things. These teachers had closer emotional bonds with white male students and a lower tolerance for resistant behaviors from Black students. Unfortunately, the findings from these studies are not outliers (Skiba et al. 2002) and have been a prevailing theme in the literature surrounding school discipline for 50 years (Children's Defense Fund, 1975).

These disproportionate disciplinary infractions on Black boys have consequences. School exclusionary discipline practices have ostracized Black boys from their school communities (Webster & Knaus, 2021; Wiley et al., 2022; Cooper et al., 2022). One phenomenon that surfaced in the literature is the hypervisibility of Black boys in schools because they experienced harsher disciplinary consequences than their white counterparts while exhibiting the same behaviors (Diamond & Lewis, 2019). Thus, Black boys are more prone to exclusionary discipline not due to their behavior but to the color of their skin. Most of this research stems from studying the disciplinary experiences of Black boys in traditional public schools; however, more research is needed to explore how school contexts shape boys' racialized experiences (Leath et al., 2019).

Black Boys Discipline in Predominantly White Christian Schools

Although school discipline research around race explores Black male experiences in myriad contexts and highlights the role of white educators in punitive disciplinary practices, it does not exhaustively explore Black male disciplinary experiences within PWCS (Willis, 2022; Willis & Miller, manuscript submitted for publication). One could assume (and many parents do) that Christian schools are safe places for all students to find peace and affirmation due to Christian schools boasting more explicit teaching of morality than secular public schools. Scholars, like Jeynes (2002), suggest that Christian schools provide greater racial harmony than public and charter schools. Although this theory has not been empirically refuted, there is substantial evidence to suggest that PWCS participate in the dehumanization of Black boys in similar ways to public schools (James, 2019; Neal-Stanley, 2023; Willis, 2022;). Furthermore, Jeynes' (2002) research instrument only examined the relationships between Black and non-black students; it did not explore the relationships between Black students and non-black teachers. Thus, the findings did not even explore their experiences from a disciplinary standpoint.

In the limited scholarship that exists on the experiences of Black students in PWCS, scholars found that Black boys experienced *more* explicit forms of racism in PWCS (Neal-Stanley, 2023). Little & Tolbert (2018), found that two high-achieving elementary-aged Black boys who attended Christian schools had their intelligence questioned and their behavior criminalized. These young men were often in trouble and removed from the classroom until their parents decided it was best to withdraw them from their schools. Neal-Stanley (2023) found that anti-blackness permeated the experiences of Black students at a former segregationist academy. Student reflections indicated that the teachers' relationships with Black males were often antagonistic and that Black males frequently left those schools because teachers would pinpoint them for the bad behaviors of other students. Furthermore, teachers would complain of feeling threatened by the Black male students. Black males experienced adultification in which their behaviors were criminalized as if they were enacted by adults, leading to harsher consequences such as expulsions. Similarly, Willis et al. (2024) found white teachers were allowed to demonize, criminalize, and exclude Black ways of being. In this research, the paradoxical nature of punishment in Christian schools is evident: while some might assume Christian school sites deploy Christian values of acceptance and love, this research is aligned with other scholarship that proves the contrary.

In sum, knowledge is abundant regarding the disciplinary experiences of Black boys in predominantly white American public schools. However, there is only a smidge of scholarship regarding the disciplinary experiences of Black boys in PWCS. The limited research that was provided explored the reactions of the parents of Black boys and examined a former Christian

segregationist academy (Neal-Stanley, 2023). The limited research revealed that the antiblack misandrist animus of the PWCS is so pungent that parents opted to remove their children from these toxic environments (Little & Tolbert, 2018). However, this study focuses on the reflections of Black boys who experienced and witnessed school discipline within a PWCS because we seek to give voice to Black boys who are the subject of much social projection. Far too often, Black boys' voices are overlooked as it relates to their experiences with discipline in education overall. In the next section, we describe the theoretical lens of BlackCrit and antiblack misandry that guided our work.

Theoretical Framework

BlackCrit

Dumas and ross (2016) conceptualized BlackCrit to address the limitations of Critical Race Theory (CRT). While CRT offered an important critique of white supremacy, it was too general to address the concerns and experiences of Black people. BlackCrit espouses three core tenets. The first tenet suggests antiblackness is endemic and central to how many make sense of human life. In essence, antiblack ideology is a permanent fixture in the global psyche and is normal. This explains how white people can rationalize and justify the senseless murder of men like Mike Brown, as opposed to acknowledging the criminality of state power in his death. The second tenet suggests multicultural neoliberalism is antagonistic toward blackness. Multiculturalism conflates Black people's struggles with other marginalized ethnic groups to the extent that Black issues become overshadowed by the larger whole. The third and final tenet espouses that BlackCrit must leave room for Black liberatory fantasy. In essence, Black people imagine a reality beyond social subjugation. Hence, theorists must conceptualize a reality in which the identities of Black people are not reduced to the transatlantic slave trade, enslavement, and subsequent oppressions. The emphasis of this study will focus on the first tenet which conceptualizes antiblackness as an endemic, or normative, to how many people make sense of reality.

Antiblack Misandry

While important to the present work, BlackCrit is insufficient to provide a comprehensive analysis of Black male participants' experiences because it does not consider the role of gender. Kimberlee Crenshaw (1989) coined the term intersectionality to speak to the need of cross-sectional analysis of social identities. Scholars like Crenshaw and Patricia Hill Collins (1990) espoused that having multiple marginalized social identities (gender, race, sexuality, etc.) causes people to experience oppression more severely. These scholars were particularly interested in the unique identifications of Black women who, for example, experienced multiple layers of oppression because of their race (due to racism) and gender (due to sexism and patriarchy). However, Tommy Curry (2017) challenged the notion that Black men benefit from patriarchy by highlighting statistics that demonstrated that Black men are more likely to be killed by police than any other demographic of people. Furthermore, Curry argued that black men's sexual assaults are often disregarded. Thus, he concluded that Black men do not have the privilege of participating in patriarchy because white power brokers have denied their masculinity and their humanity to the extent that they are not even seen as men (Curry, 2017). Furthermore, their prototypical masculine traits of being strong and powerful cause them to be positioned in the white imaginary as bestial (Kendi, 2016). Finally, antiblack misandry causes Black men to be deemed worthy of death and exclusion because in the racial fantasy land created by the white imagination (Mills, 1997), they are seen as violent sexual

predators with bestial desires prone towards social deviance (Ladson-Billings, 2011; Irby, 2014). Thus, due to their perceived social deviance many believe that Black bodies need to be hyper-surveilled for the safety of the community. Black men within the American school system live in a carceral state in which all of their actions are policed (Williams, 2024). In essence, Black males can never be the victim because they are always the presumed culprit of violence, rape, and deviance (Irby, 2014).

The current study builds on other research that utilizes the frameworks of BlackCrit and antiblack misandry by turning attention to the ways in which Black boys experience discipline in schools. For example, Bryan (2022) demonstrates how deficit-thinking, academic achievement gap language, and the failure to listen to Black boys—all examples of antiblack misandry— negatively shape the educational trajectories of Black boys in early childhood settings. Bryan, DeJohnette & Johnson (2024) extend Bryan's earlier work to explore how antiblack misandry practices in early childhood lead to the exclusion of Black boys from play experiences, which are critical for healthy childhood development. Extending the notion of deficit-thinking as *fake love*, Johnson et al. (2019) suggest white teachers dehumanize Black boys with hate disguised as professed love. They explain, "White teachers, like White people in general, 'love on' Black culture but do not 'love on' Black people (p.54). Indeed, it is difficult to 'love on' those whom are not recognized for their humanity. Coles & Powell (2020) utilize BlackCrit, along with Critical Race Theory and critical literacy, to explore the relationship between racial disproportionality in school discipline and the micro-level context of systemic societal Black exclusion. Turning attention to the ideas of Black liberatory fantasy, one of the tenets of BlackCrit, Coles (2023) engages Black youth in story work methodology (Tolliver, 2021) to re/imagine an education that explicitly addresses anti-Blackness. Our work contributes to this body by using BlackCrit and antiblack misandry to look specifically at the experiences of Black boys in a nuanced school context: PWCS.

Methodology

It is important to state that the positionality of the authors necessarily shaped the way we approached this study, from recruitment to data collection to analysis. Evan is a Black Seventh-day Adventist (SDA) Christian pastor who comes from a pastoral family. Furthermore, he is the son of a retired school administrator who spent several years as an SDA Christian school educator. His entire PK-12 experience has been within Christian schools: first through fifth grade in a PWCS, and the rest of his educational journey within Black SDA schools with the SDA experience being a Black religious enclave where Afro-American History, Black History Month and Black educators were the norm (Willis, 2024). However, the PWCSs he attended were the opposite: when Trayvon Martin, Freddy Gray, Mike Brown, and the Charleston 9 were murdered, his white teachers never addressed those events or the impact they had on Black students. These same white teachers entertained arguments that Black History Month was racist. Evan realized that race mattered in these environments and that racism showed up in subtle and overt ways. Thus, he comes to this research as a scholar who knows unidentified truths about the realities of Black boys in PWCS and views himself as a steward of the participants' sacred truth and hopes to present their experiences accurately in a way that shines light on a hidden experience.

Erin grew up in the late 1970s and 1980s in a middle-class family on a dairy farm located in a poor, rural area of the South. She attended predominately Black schools and learned to openly discuss race and racism from her mother, a far cry from the racial silence she learned was more typical of white families (Kotler et al., 2019). When Erin became a mother herself in 2002, she thought she might do

a good job raising antiracist white children because of the lessons learned from her own mother. Erin was wrong. Her 2013 ethnographic dissertation study (Miller,) on the ways her young white children learned to know themselves as white revealed that her children were internalizing racist messages from every corner or their worlds, unless they were actively rejecting them. Of particular interest to this present study, Erin constructed two major findings from her early scholarly work: deeply entrenched racist ideologies were taught and learned in predominately white, Christian settings and Black boys were positioned in the white imaginary of white girls as dangerous (Miller, 2015). This understanding led Evan and Erin into future interrogations of racism fueled by white Christianity and how it is entangled with racial violence toward Black boys and men, laying the foundations for the present collaboration.

Data Collection

Evan collected this data in the Fall of 2020 in a study that analyzed the racialized experiences of Black boys who attended PWCS. He conducted one 30-minute interview with 22 Black men who attended a PWCS for at least one academic year between 6th-12th grade. These research participants had attended a myriad of PWCS across the United States. However, within this data set, there was a subset of four students who all attended the same school during the 1990s. For this manuscript, Evan invited Erin to analyze the interview transcripts from these four research participants.

Participants

The participants for this study were recruited from informal alumni networks. Evan, a Black male who attended a PWCS, had access to multiple alumni networks. In Table 1, we provide brief demographic data about the participants. For this manuscript, these interview transcripts were selected because these students attended the school concurrently. The participants' time in the school overlapped between 1994 - 1999. The school was located in Small urban city in the Mid-Atlantic. It is important to note that the boys did not come to the school with prior disciplinary infractions.

Name	Years at School	Home Environment
Troy	5	Suburban
Rick	7	Suburban
JaHud	7	Urban
Sean	1	Urban

Data Analysis

We used a qualitative case study to make sense of the previously collected data. This case is a derivative of a collective case study which explores a collection of shared experiences with a phenomenon (Hill & Millar, 2015). The bounded case of this phenomenon examined the ways in Black boys encountered a PWCS disciplinary environment (Yin, 2014). Furthermore we analyzed the interview data by utilizing Braun and Clark's (2006) method for thematic analysis. We chose this

method of analysis because it provided a flexible, yet structured tool to render a complex account of the data corpus (Seidman 2006). This was important, in part, because we each came to data with differing degrees of familiarity. Since Evan conducted all interviews and previously researched the data collected, he knew the data intimately; therefore, it was necessary for Erin to spend the first few weeks of the project immersing herself in the data with repeated, active readings to gain a similar level of familiarity. The data were accessed through a shared, password-protected Google Drive, where the individual transcripts of interviews were organized by pseudonyms.

In the next step of analysis, Evan independently coded data using multi-colored highlights in Google Drive. Simultaneously, Erin uploaded the data into an N'Vivo 14 file and independently coded in that platform. We chose different platforms to conduct our individual analyses due to personal preferences. During these individual coding sessions, we refrained from collaborating so that we would not influence each other's coding. Collectively, we determined 41 codes in the data that spoke to our research question. After individually coding, we met via zoom multiple times to collapse and consolidate our codes using a process of iterative, dialogic inquiry (Wells, 1999). Using a large sheet of butcher paper, we created a network map (Kinchin, Streatfield, & Hay, 2010) to visualize how the codes (and emerging themes) were connected to one another and the research question. From there, we tentatively assigned themes to the data and checked to see if the themes worked in relation to the coded extracts (Level 1) and the data set (Level 2). Once we were confident our themes reflected patterns in the data in ways that that responded to our research question, we collaboratively generated definitions of our themes. The themes we share below respond to our overarching research question, "*What were the disciplinary experiences of the Black boys who attended a PWCS?*". The findings from this study provide insight into the ways that millennial Black boys encountered school discipline within a Mid-Atlantic PWCS and can not be considered comprehensive. Furthermore, the findings provide insight from a certain school bound in a certain state of time for a world that no longer exists. For instance, these young men were in school during the aftermath of Rodney King and amid the OJ Simpson trial, but they did not experience the social and political animus of a Donald Trump presidency. Thus, the findings must be examined within context and highlight the need for more contemporary research to see how much things have changed in the past 25 years.

Findings

Case Setting

White Knight Christian Academy

White Knight Christian Academy (WKCA) is a nondenominational PWCS founded in the 1950s. This school emerged amid a national movement for Christian education which led to the founding of several American Free Christian schools which were schools that had no denominational affiliation (Fakkema, 1928). These schools were founded by concerned Christian parents who felt as if the growing pluralism of society especially in urban cities was leading to the moral decline of the country (Slater, 2021). These concerns became heightened in the aftermath of *McCollum v. The Board of Education* (1948) which removed Bible instruction from the school. This decision by the Supreme Court only confirmed the evangelical concerns over the moral state of the nation and heightened their desire to protect their children from the wayward government (Slater, 2021). Thus, this created the perfect storm to found WKCA due in part to the Christian school evangelist, Dr. Mark Fakkema, stirring up fear and excitement amongst parents in the area who desired a school to protect their children from paganism. By the 1990s this school had grown from a fledgling elementary school into a K-12 school that served as a feeder to a regional predominantly white Bible

college. A school built on fear designed to protect the founders' students from the social evils of secularism, and paganism the school's ethos remained down that vein. Thus, these schools promoted a belief that the church, home, and school must work in concert to educate a child (Fakkema, 1928). The way that this ecological educational paradigm plays out within Free Christian schools like WKCS minimizes the church and subjugates the school to the convictions and control of the influential parents. The problem that this creates is that parents do not always know what is best for all children, and when outsiders enter these educational communities their learning needs and desires are diminished by the majority. In this case, the majority of parents were white middle and upper-middle-class politically conservative parents. In WKCS, Christianity merged with political conservatism to the extent that these two ideologies were nearly indistinguishable. Each morning the students stood to do the pledge of allegiance and sang My Country, 'Tis of Thee. However, this once all-white school now had hints of color as some inner city Black children rode the bus to school, as well as from other more affluent areas with their white classmates. However, as Rick recalled:

> I told them my parents were voting for Clinton. The teacher was like, "Stop lying". She was like, stop joking around. …. "They wouldn't do that. He supports abortion".

The environment was such that it attempted to indoctrinate students with the ideology that Republicans and Christianity were synonymous and that Democrats were wicked. Although this school accepted diverse students it did not accept all views and expected conformity to the ideals of white conservative parents. Black students like Sean who came into WKCS from a public-school environment did not feel comfortable as a student:

> So, a normal day of school would consist of me listening to my Walkman on the way to school. As soon as I step foot into the school, and it was a while away from where I lived at, I kinda felt that I kinda needed to go into shelter mode almost.

Sean felt the need to go into a shelter because the school environment was not welcoming of differences. From his perspective they expected everyone to be the same, but the culture of the school attacked him and did not embrace him into the school environment. Thus, on the bus he listened to his walkman, and at school he went into protection mode. This was not just the case for him but also for JaHud. He recalled how he felt at 8 years old after the OJ Simpson verdict:

> I remember always feeling like I had to proactively compensate for something that was going on in the world. Like, I need to hurry up and present myself in a way that white people will accept me proactively.

The school environment let him know that it was not a safe place to be Black and that he had to perform to fit in and be accepted. The OJ Simpson trial mattered in his young mind because of things he heard from teachers and students and the arguments that he was guilty. Finally, Black boys entered an environment where students had minimal dealings with Black people. The white students revealed their implicit biases through innocent but demeaning questions. Rick recalled:

> They definitely viewed me as a mission project. We're helping this guy out. He's here on scholarship. I remember that everyone always asked me if I lived in my apartment.

Rick came from an upper-middle-class family and was one of the high-achieving students, but his classmates assumed that he was from the low socioeconomic urban neighborhoods their busses road through in route to school. Thus, in the minds of many white students in WKCS blackness was synonymous with urban, which in their minds implied disorderly. Rick explicitly recalled a notion in the school that Black students from the city were identified as "troublemakers" and as individuals white students did not want their parents to know that they were associated with in school. WKCS informed Black students that this was not a safe place for them and that good Christians were conservative Republicans who enacted white norms. If you shared anything other than these values, then you must be immoral. With this in mind, we move towards our research findings.

Broken Windows Disciplinary Practices

The data revealed that the school disciplinary practices were born out of a carceral state. A state that mirrors a broken windows policing model in which Black males were presumed guilty and penalized for enacting stereotypical forms of Blackness like sagging pants or missing a belt. In essence, the school attempted to eradicate stereotypical forms of urban Blackness to promote stereotypical forms of white middle class values. This social philosophy was institutionalized through targeted disciplinary practices like detention, demerits, corporal punishment, and expulsion.

Rick recalled attempts to control Black students who enacted stereotypical urban dress such as sagging pants:

> One teacher would wait for it. He would wait for me outside before my home class. Wait outside for me and just-- It wasn't just me. It was all the black students he'd just wait for you to like want to pull your pants up. First, it's a warning and detentions and next thing you're always in detention.

In the 90's dress code violations were penalized because schools wanted to keep gang influence out of the school building. Thus, schools began to implement things like dress codes, and uniforms. This became a national movement, but dress code enforcement became highly subjective, and these rules became enforced even in the absence of gang environments. In Rick's case he was not trying to sag his pants; he was skinny and would at times forget his belt. It is critical to note that this teacher was targeting Black boys and ignored the white students' attire. In essence, the teachers were attempting to squelch any perceived Black/gang influence in the school. Sean recalled this teacher as always "writing me up" which meant he was giving him demerits, these demerits led to major consequences:

> My personal experience was I got kicked out of that school. I got kicked out of the school not for any necessarily any singular act but actually an accumulation of what were called pink slips. You know, you could get them for not wearing a belt. You could get them for a whole bunch of like ticky tack reasons.

This Broken Windows school discipline matrix resulted in the expulsion of a student because they did not conform to the standards of the school dress code. In essence, Sean was not expelled for violence, gang affiliation, narcotics abuse on school grounds. He was removed for not wearing a belt. Troy, Rick, and Sean were all friends since they were toddlers because they attended the same church and Troy and Rick were brothers. Troy recalled Sean's expulsion and the principal's messaging around him in an end of year assembly:

They like used him as a talking point. They were like, "We just want to reiterate the dress code you have to have this. "I don't want to pick on him, but example of what not to do is be like Sean.

They expelled Sean and then highlighted his attire as the standard of what not to do in a public fashion. Sean was scapegoated publicly and expelled for trivial reasons. However, this Broken Windows school discipline approach was intended for Black children specifically. In Troy's recollection there were several white boys that celebrated Black hip-hop culture:

They adopted the whole culture. I mean the sagging pants, high-top Fades on a white boy kind of like you know, like the Vanilla Ice type of look.

However, white students were not dismissed due to their attire, or for enacting Blackness. In essence, white boys were allowed to commit the same behaviors, but they were not held accountable for enacting stereotypical Black behaviors. This leads to the next finding that Broken Widows school discipline was a targeted initiative that only Black boys could be penalized for enacting. In essence, Black children were held blameless if they enacted white conservative Christian behaviors, but penalized to the fullest extent of school policy if they acted like they were from the hood.

Targeted
The participants at WKCS were targeted for school discipline by their white teachers. Rick recalled his 7th grade teacher's reaction on the first day of class:

She just thought I was a troublemaker. The first day of school, I had assigned a desk in the corner away from everybody else so I wouldn't influence anybody. It was me, a Filipino student and another African American and she separated all of us, just off the break. Just a preconceived notion of who I was.

Rick knew this because the teacher publicly stated her reason for separating him and the other students of color from the larger group. This teacher had no prior interactions with him although he had been a student at the school for more than 3 years and had no prior disciplinary problems. She assumed that he was going to be a disruptive influence in the class. Although he did not come from what many perceived to be a disruptive urban environment. He further recalled:

I went from fourth to sixth grade, never got in any trouble. My seventh grade year, I think I got a couple detentions or something like that but by ninth grade I was like, in detention all the time for stuff.

In Rick's reflection the impact of this teacher led him down a path of constantly being written up, getting detention and being associated with trouble. This high achieving Black boy's identity transformed from innocent high achiever to being viewed as a problem. The targeting of the teacher resulted in him having a bullseye on him by other white educators in the building and instantaneously his reputation amongst the teachers spiraled. Sean had one teacher in 7th grade who he felt targeted him, he recalled:

And, you know I kinda felt that sometimes I would get marginalized by one teacher and he probably sent me to the office maybe about one time a week.

Sean felt targeted by one particular teacher and he felt as if this teacher did not like him because he was Black. He explicitly told the principal that he did not think that this one particular teacher did not like him because in his words "the color of my skin". He further went on to say of his disciplinary experiences at WKCS:

> What I was seeing was that anything outside of what their norm was or what their scope of what they felt was normal, they really didn't know how to handle it short of you know sending you to the principal's office.

As was previously stated before the school expected all of their students to enact whiteness and anything outside of the scope of white protestant conservative values became a problem. Black boys were removed from the learning environment because they learned and perceived things differently than their teachers. Evidently, difference was deemed as disruptive to the learning environment. JaHud recalls his disciplinary experiences:

> If you got a couple of detentions you got a demerit. If you had a couple of demerits you got a suspension. Then like at the bottom of the list was paddling. Anything I did, they wanted to paddle my Black ass.

JaHud noticed that the principal always wanted to spank him as opposed to following school protocol. In so doing, it is evident that there was something beyond discipline that the principal was focused on and he desired to enact corporal punishment on him even when it was outside of the scope of school policy. However, there were certain white students who received preferential treatment compared to the Black students When Sean was asked to recall preferential treatment based on race he responded:

> There was a student who was the child of someone in the administration who happened to be very… let's just say they tolerated a lot with this kid, you know a lot of talking back in class…. The kid would always be out in the hall with no hall passes you know, and certain teachers would kinda you know turn the blinders to it so to speak.

In Sean's mind had this been a Black student or Black family this child would not have received the same kind of treatment. Thus, while white students enacted similar problematic behaviors the response to a white child as opposed to a Black child were starkly different. Consider how Troy's reflection on a racially charged incident was handled during physical education:

> One day there was a white kid who's wrestling a Black kid and in the midst of their wrestling the teacher was acting as a ref. I guess the Black kid accidently tore this shirt that he really liked. So, the white kid calls him a nigger like and he went berserk. He was like trying to fight this kid. He was throwing fist and everybody saw it; I think he was just a PE teacher. Then he like went off on his kid, I didn't really hear what he said. But I just think they kind of let him have it. So, at the end of the day came and we're all standing in the hallway. They were just talking about what had happened. It wasn't all the students. He probably has a group of like five or six students. So we were standing in the hallway, just talking. The few of us who are still there, and the white kid from the ordeal was there and he was just like, he was basically saying, "Yes, man, I really, I just lost my temper." Like, he knew messed up. So the principal came, he had like two or three pink slips in his hand. And I was like, "Oh, that

dude is in trouble." So, everybody saw the principal coming and they're just like, "Oh, I'll see you later." He wasn't expelled, I don't think he was suspended. He just got like the system there was you get demerits and if you get a certain number of demerits. And then it leads to next level, you get detention, you get suspended, you get expelled. So, he got several demerits. But I don't think it was any worse than that, I think it was just like, "Kid you know you messed up." He showed remorse, he apologized, two of them shook hands, but at the end of the day, we just moved on.

Removing the racially charged component to the incident, looking at this incident at face value a child gets upset uses foul language and engages in a violent action, but the schools only response to this incident is to utilizes demerits. If there was any behavior that warranted an exclusionary disciplinary action such as a suspension it was this act. However, adding in the racial slur that was used it warranted a harsher penalty. However, something that Troy added later was that the white principal had a relationship with the student and the family. His race and this relationship spared the student from a harsher penalty. However, Black students were penalized and policed because of the color of their skin, for enacting urban Black styles, an because they were deemed outsiders.

Discussion

This study used BlackCrit theory and an antiblack misandry framework to ask: *What were the disciplinary experiences of the Black boys who attended a PWCS?"* This central research question is supported by a subquestion "*How did their disciplinary experiences shape their perceptions of the disciplinary environment?* This study aligned with previous research that demonstrated that Black boys in PWCS were the victims of a punitive school discipline culture (Little & Tolbert, 2018). Furthermore, school discipline was subject to the biases of white teachers who oftentimes did not penalize white students for the same activities (Diamond & Lewis, 2019; James, 2019). However, this study adds a layer of depth because it takes note of the fact that these disciplinary cultures are a byproduct of the antagonistic relationship between white American Christianity and its disdain for pluralistic thinking which is often manifest in urban communities because of the diverse cultures present in the city. Furthermore, this disdain for stereotypical Blackness presupposed disorder and chaos which created a disciplinary culture that mirrored broken windows policing theory. This approach to school discipline ensured the surveillance of Black students who wore baggy clothes and untucked shirts. However, white students who wore baggy clothes were not penalized, which highlighted the fact that Black boys were targeted for minor infractions. This environment made students second guess their behaviors in an attempt to appease their white teachers and peers. This also made students hyper-aware of their Black selves and come into the school building with an emotional protective shell.

BlackCrit Theory and antiblack misandry informed our analysis of this study. The school faculty demonstrated a disdain for their perception of blackness which was synonymous with criminality or a ghetto culture. For instance, Black boys were under surveillance and disciplined for the non-violent offense of breaking dress code by having sagging pants. The severity of this was demonstrated when Sean was expelled due to his constant uniform violations. The principal added insult to this expulsion through publicly naming him as the type of student that students shouldn't emulate especially regarding dress. Furthermore, the teachers were careful to police the manifestation of blackness only within Black students because white students would enact stereotypical Black hip-hop culture and receive no penalty. These incidences align with the first tenant of BlackCrit because antiblackness was normalized within WKCS to the extent that no one confronted or acknowledged

the biases. Even when Sean mentioned sensing a teacher did not like him because he was Black the principal did not follow up with the allegedly racist teacher. Antiblack misandry manifested in Rick's story because the teacher separated the racially minoritized boys from each other because she perceived that they were troublemakers, but the teacher did not do the same thing toward the Black girls in the class. This demonstrates that Black boys in particular were perceived to be threats in the classroom. Furthermore, Rick recalled that in 7th grade he went through an identity transformation that regardless of his academic prowess he was now seen as a problem child. This "troubled" Black boy still maintained a high grade point average, but the school environment became oppressive and he was reduced to a stereotype that he was unable to separate from because the white imaginary had developed their verdict regarding him. White male privilege was manifested in the school because white students could wear sagging pants, disrespect their teachers, and receive minimal discipline for saying the n-word. However, Black boys were threatened with corporal punishment for minor infractions, expelled for repeated dress code violations, and sent to the office routinely for non-disruptive behaviors. These findings align with Tommy Curry (2019) who pushes against the idea that Black men are granted male privilege because their maleness did not supersede their male identity. As a matter of fact their Black maleness made them hyper visible and targeted for uniform violations because of the educators perceived criminality of Black communities so much so they attempted to exterminate any trace of Black male hip-hop fashion.

Finally from a Christian education standpoint, the moral emphasis in this PWCS was one in which they were attempting to reproduce conservative white American Christian values in the Black boys. In essence, they followed the pattern of the Native American boarding schools because the educators sought to kill the African but save the man. Thus, they wanted these Black boys to dress in Eurocentrically appropriate ways, enact white behaviors, comply with the rules, and align with conservative political values, they could tolerate the Black skin as long as they had white spirits. This evangelical approach attempted to redeem the Black students by indoctrinating them into the *moral superiority* of whiteness. Jahud felt the pressure at a young age to comply with the white students and perform a role to ensure that all those around him were pleased and didn't feel threatened. He was expected to side with many white Americans regarding the OJ verdict by being outraged that a Black man was found not guilty. What they wanted was a Black male body that acted white, and subordinated itself to the white patriarchal power structure. When the boys' blackness was too pronounced, it threatened their Christian ideals which were solidly rooted in whiteness.

Future directions concerning research surrounding school discipline in white Christian schools should provide a contemporary analysis of their disciplinary experiences. This is critical because these schools lack governmental oversight which creates an environment that is potentially rife with prejudicial behavior. Furthermore, there should be a greater exploration into the disciplinary culture of PWCS that accept state voucher programs.

Recommendations

Our recommendations respond to two of the guiding questions for this specially-themed issue: *How does this work challenge the current landscape of school discipline for respective stakeholders in the text? (e.g., research, policy, practice)* and *In what ways does this work critically examine the paradigm of school discipline and afford nuanced and thought provoking paths forward for a justice-focused discipline construct?*

School Administrators

Within this study the scope of power for the principal within WKCS was unilateral. Furthermore, the disciplinary environment appeared to be punitive as opposed to transformative for Black children. In essence, children should not be removed from a school for minor disciplinary infractions such as dress code violations. Teachers and school administrators must first deal with the humanity of the student before addressing the behavior. However, if Black boys are not first seen as fully human, they can never be disciplined properly. Thus, school administrators should develop a more holistic approach to school discipline. Within these stories, teachers were at times given too much latitude to remove students from instructional learning time due to personal preferences. It would behoove administrators to investigate the reason for office referrals, because students should not be removed from the classroom for minor infractions (Williams, et al., 2022). Research has demonstrated that in many cases Black boys are removed from the classroom because teachers assume mal intent (James, 2019). Thus, Administrators can serve as intermediaries in two ways. First, administrators can provide an investigation on the reasons that students are disciplined. This will allow them to understand the issue, see why the student may have been disruptive in the classroom, or come to find out that the student did not deserve to be sent to the office. Second, administrators can begin to address the root cause of their school's disciplinary problem and provide professional developments geared towards empowering their teachers to teach their classes in a more culturally informed manner and to better manage their classrooms (Gay, 2002). Furthermore, administrators should ensure that they develop a professional development calendar that systematically walks their schools through culturally responsive classrooms (inclusive of teaching, classroom management, lesson planning and discipline). Finally, administrators in PWCS can play a pivotal role in sharing the disciplinary role by assembling a disciplinary council that oversees major disciplinary issues (Williams, et al., 2022). This council would take the time to hear from all of the involved parties, review whatever pertinent evidence to the issue and ensure that the disciplinary infraction is being handled equitably. This counsel comes together not so much to investigate the student(s), but to ensure that the educators are following proper guidelines and handling the situation in a fair and equitable manner.

Teachers

Teachers play a critical role in school disciplinary procedures because oftentimes they are referring students for discipline. However, at the root of many disciplines are classroom leaders that must develop appropriate classroom management procedures. Due to Christian schools being overwhelmingly white teachers may need additional assistance understanding racially diverse communities and students because their whiteness often informs their faith (Gay, 2002; Miller, et al., 2022; Willis, et al., 2024). In essence, the way one teaches and administers all white classrooms differs from the classroom management approach when Black boys enter the classroom environment. For instance, one might view a Black boy as being defiant because the teacher is giving a directive in the form of a request and the child declines it because he perceived the statement as a question. This is a common occurrence because in Black households children are typically told what to do and not asked to do what their parents ask (Delpit, 1995). Teachers should set the precedent and reinforce classroom rules at the beginning of the school year so that students do clearly know the expectations. It is imperative that these rules align with the general culture of the school and align with the policies of the district so that children do not get confused with rules of each teacher. Finally, teachers must approach culturally responsive professional developments with an open mind and be willing to do the internal reflection outside of the classroom time (Williams et al., 2022).

Teachers must be willing to do thorough investigations of their own prejudice and biases, because at the root of a lot of the school disruption is the baseline assumption that these children are problematic to the learning environment due to their race (Willis, 2022). If teachers cannot check those assumptions and understand the reason they believe certain things about racially minoritized children they will inevitable do educational and psychological damage to the students.

Conclusion

This study is a damning look at the experiences of four Black boys at a PWCS. While these schools are often chosen by parents because of a belief that the schools operated on high moral standards due to the religious nature of the school, in this study, this PWCS revealed to be a space of prejudicially punitive discipline. Instead of finding grace and acceptance they found anti-black misandry. This study revealed that the problematic disciplinary practices of American public schools extend in to PWCS because at the root they are rooted in a shared antiblack sentiment. While this study's findings were revelatory, one critical component is that these schools need to be analyzed nationally, to develop a greater understanding of this phenomenon. Furthermore, it would also be groundbreaking to see a contemporary ethnographic study of discipline within these schools. In short there is much more work to be done within these schools so that more researchers can grasp a greater understanding of the realities of these schools and the unique ways that discipline manifests in these spaces for racial minorities.

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Restorative [In] Justice:
Why Schools Struggle to Implement Restorative Justice for Black Girls

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Abstract

As the nation reckons with the role that the over-expansion of zero-tolerance discipline policies has played in the disproportionate disciplining of Black girls and Black children as a whole, restorative justice (RJ) has taken center stage in the quest for change. This paper explores the tensions that arise when moving from restorative justice theory to practice. Drawing upon data from a critical ethnographic study, and employing intersectionality as a theoretical frame, this paper explores how one school struggled to implement a genuinely restorative model for Black girls based on their inability to engage, with fidelity, the foundational principles of restorative justice. Without a firm grasp of and commitment to the core principles of RJ, the restorative process in this school was co-opted such that it reproduced the inequities it was hoping to disrupt and functioned as zero-tolerance discipline by another name.

Keywords: restorative justice, Black girls, school discipline

Introduction

For two years, I served as the co-director of a school-based restorative justice center at James High School (JHS) located in southeast Michigan. Affectionately known as the RC, the center's goal was to disrupt exclusionary disciplinary practices by building healthy relationships, developing skills for effective communication, and engaging in peaceful conflict resolution. Ideally, when conflict occurred, our restorative process would focus on surfacing the root issues, addressing harm, and creating agreements for moving forward so that suspensions or expulsions were unnecessary. Yet, we did not live in the ideal. Most often, the restorative process was distorted and played out like the following situation between Candace, a 10th-grade Black girl and her white math teacher, Mr. Clark. In this situation, Candace received a two-day suspension based on a disciplinary referral that read: "Candace was instructed to focus on classwork but refused by arguing and cursing, and generally just being disrespectful."

That was it. That was all of the information Mr. Clark provided. The reader of disciplinary referral was expected to believe four things about Candace. First, she was either incapable of being attentive to her coursework or simply lacked the desire to do so. Second, she was defensive and confrontational when approached about her demeanor. Third, she engaged her teacher in this manner out of an intentional desire to be impolite and rude. And fourth, she acted this way without any *reasonable* stimuli because all she had been instructed to do was focus on her classwork. All of these characterizations positioned Candace as *the* problem. I talked to Candace in the RC about what happened. She shared that during class, she expressed frustrations to her peer, Dominique, over not receiving full points on most of her assignments. Unexpectedly, Mr. Clark approached her and stated that he "did not like the way that she was talking to him." She responded that she was "talking to Dominique, and not him" and that she did not "see a problem." She attempted to end the conversation but Mr. Clark, continued to "press her…with an attitude". She returned his energy and responded to him that he was "not her father". At this point, Mr. Clark advised her to stop before he wrote her up. She remembered her anger rising at being unfairly threatened. She expressed

that he could not write her up because she "did not do anything wrong." The longer she processed this situation with me, the angrier she became because she *knew* she was going to be suspended based on his inaccurate documentation of the incident. As tears flowed down her face, she stated:

> I can't win when I'm at home. I can't win when I'm suspended over something that should have been avoided…I'm the only one who's getting sent home and robbed of my education. He's not getting robbed of his paycheck…Everything is about the teachers winning. Every time someone gets a chance, every time someone gets into with a teacher they write a referral and you don't even know you have one…I should have the opportunity for fairness, I don't even see the opportunity…I don't see the opportunity. As she repeated the last phrase, she stared at me with a look that dared me to disagree.

I opened with this vignette and shared it at length because it vividly demonstrates the heart of this paper's inquiry. This interaction was characterized by misunderstanding, feelings of disrespect (on both sides), perceptions of discrimination, and misuse of power. Without the opening framework about the RC and JHS' expressed commitment to restorative justice (RJ), this interaction between Candace and Mr. Clark would appear to be your regular, run-of-the-mill disciplinary process for Black girls where a white teacher perceives them to be disengaged and disrespectful and they see their self-advocacy as being wrongly problematized. In maintaining the traditional power structures in schools that privilege adult voices over and above youth, Mr. Clark's characterization of Candace as an unengaged, confrontational, unproductive member of the class community was used to justify her exclusion from the classroom for that day and the next two. Candace's perspectives, feelings, and experience of the situation held no legitimacy and did not matter to the disciplinary decision. *How is an interaction like this possible in a school committed to restorative justice?*

This paper will explore the tensions that arise when moving from restorative justice theory to practice in school by examining how and why JHS struggled to implement a genuinely restorative model for Black girls. I argue that the root of JHS' struggles could be traced to their inability to engage, with fidelity, the foundational principles of restorative justice. They were unable to address legacies of racial mistrust, did not adopt notions of respect as reciprocal and nonjudgemental, and were relationally negligent. Without a firm grasp of and commitment to the core principles of RJ, the teachers within JHS were selectively sampling pieces of a restorative model that would never add up to the whole. As the opening vignette from Candace demonstrates, what resulted was a co-opted restorative process that was traditional school discipline by another name.

Literature Review

Zero Tolerance Discipline

RJ practices, like those hoped for at JHS, emerged in response to the carceral disciplinary environment birthed by zero-tolerance policies of the 1990s. Amid rising fears that our schools were succumbing to escalating violence and drug use that was plaguing communities, there was a push for "no tolerance" of weapons and violence on school grounds (Hines-Datiri & Carter-Andrews, 2020; Morris, 2016). Using the criminal justice system as the blueprint, the new *zero-tolerance* policies aimed to deter violence using highly punitive punishments (Suvall, 2009). While in the criminal justice system, this looked like mandatory minimums—lengthy prison sentences for low-level drug offenses—within schools, these "minimums" were automatic suspensions and expulsions when

students engaged in punishable misconduct. Initially, these policies were narrowly focused and only intended to address weapons on school grounds. However, they quickly expanded beyond the realm of egregious violence to include other forms of misconduct, including bullying, threatening, use of profanity, and possession of alcohol or tobacco (Suvall, 2009). These policies also expanded to elevate mundane adolescent behavior into more serious displays of misconduct. More subjective forms of misconduct—disrespect, defiance, disruption, violation of the dress code, tardiness—were processed according to zero-tolerance disciplinary logic. This expansion laid the groundwork for the widespread disenfranchisement of Black students by creating a cohesive set of procedures and policies that placed Black students at an increased risk of being pushed out of schools and into the criminal justice system, otherwise referred to as the school-to-prison nexus (Hines-Datiri & Carter-Andrews, 2020, Morris, 2012, 2022). For Black girls specifically, this has meant that though they only make up 15% of the school population, they comprise 45% of all out-of-school suspensions, 33% of all in-school suspensions, and 43% of all expulsions for subjective infractions such as defiance, disrespect, and disruption (US Office of Civil Rights, 2020). They are overrepresented along these measures and have been since data on these metrics began to be collected in 2011. This high level of interaction with zero-tolerance discipline policies and practices negatively affects Black girls' health within every domain—mental, spiritual, emotional, and physical (Coker & Gonzalez, 2022; Hines-Datiri & Carter-Andrews, 2020).

Restorative Justice Theory and Practice in Schools

As the nation reckons with the role that the over-expansion of zero-tolerance discipline policies has played in the disproportionate disciplining of Black girls, and Black children as a whole, restorative justice has taken center stage in the quest for change. RJ is rooted in the principles of indigenous and African-centered justice systems that offer a paradigm shift from justice rooted in punishment that harms to justice that heals (Davis, 2019). When adopted by schools, Evans and Vaandering (2022) write that RJ is fundamentally concerned with creating just and equitable learning environments, as evidenced by the presence of spaces where everyone gets what they need and is respected for their inherent worth and dignity. It is also concerned with nurturing healthy relationships. This occurs by working to meet individual and collective needs by supporting connections among all people characterized by respectful communication and shared power. Finally, RJ in schools is focused on repairing harm and transforming conflict. Rather than defaulting to immediately punishing students through exclusion, in RJ, the response to conflict includes collaborative approaches that validate everyone's experiences and needs. RJ school programs often incorporate informal classroom practices, circle processes, restorative conferences, peer conferences, and peer mediation as alternatives to punitive, exclusionary discipline practices (Milner et al., 2018, Payne & Welch, 2018).

As RJ has increasingly become positioned as the gold standard for school communities wanting to reduce disparities in their discipline practices, whether in service of intervening on the school-to-prison-nexus or not, scholars have sought to understand the intricacies of translating RJ from theory into practice. Studies have shown that implementing RJ in schools has had positive impacts on school communities in terms of reducing the number of exclusionary discipline referrals for some (Davis et al., 2022; Gregory & Evans, 2020; Jain et al., 2014), improving relationships among students, teachers, and peers (Agudelo, et al., 2021; Gregory et al. 2018; Milner et al., 2018; Winn, 2018), and positively impacting students' mental health and well-being (Norris, 2019).

And yet, there is evidence that suggests serious challenges school communities face when implementing RJ. For example, in Michigan, where JHS was located, more schools are reporting that they are adopting restorative practices as a result of a 2017 statute that requires school boards to "consider using restorative practices as an alternative or in addition to suspension or expulsion" (Molloy et al., 2024) And yet, the U.S. Department of Education reports that Black girls across the state are still more than eight times more likely than white girls to be arrested and otherwise subjected to exclusionary discipline practices. While this overrepresentation is undoubtedly related to the wording of the statute—the omission of "justice" and the option to add restorative practices without removing exclusionary discipline (Winn, 2018)—it nevertheless represents a unique paradox. An increase in the use of RJ should result in disruptions to the school-to-prison nexus for Black girls across the state, yet it is not. Scholars have noticed this paradox and argue that an underlying factor is that schools struggle to engage the philosophical foundations of RJ that situate racial justice as central. For example, in reviewing scholarship focused on RJ in schools, Schiff (2018) found that it has the greatest chances for success when it was a part of a movement dedicated to confronting structures that normalize social, political, racial, and other injustice. Vaandering (2014) conducted a study on educators' experiences implementing RJ across different schooling contexts. Based on her observations, she argued that policy-makers and educators too often attempt to insert RJ into existing structures without paying enough attention to the structural and institutional influences poised to transform RJ into another mechanism to control behavior and reproduce existing inequalities. Evans and Vaandering (2022) noted that the expansion of RJ in schools has not yet been met with an expansion of intentionality in creating equitable spaces where race and culture are authentically engaged. This paper adds to this scholarship by exploring how JHS's inability to engage RJ's philosophical foundations undermined its implementation of the RJ program. It extends the literature, given its focus on Black girls specifically. In a systematic review of secondary school-based RJ research, Coker & Gonzalez (2022) reveal few studies specifically examined the experiences and perceptions of girls of color. As Black girls represent the student population for whom discipline disparities are growing the most (US Government Accountability Office, 2024), it is them who stand to gain the most from the implementation of RJ programs aimed at reducing, or eliminating entirely, the fallout from zero-tolerance policies. This study will add to this nascent body of research by bringing Black girls' experiences to the fore and tackling the paradox of how schools can employ RJ programs and recreate, rather than disrupt, patterns of exclusionary discipline.

Theoretical Framework and Research Design

This study employs intersectionality as a critical lens (Crenshaw, 1991). Intersectionality acknowledges that racism is deeply embedded in our social structures and institutions and that it intersects with other forms of oppression. These systems of oppression are interdependent and work together to reproduce the social advantage and disadvantages sustained within the social hierarchy. Rather than experience oppression in silos, Black folk who also belong to other marginalized groups experience discrimination from these systems in overlapping and interconnected ways. Black girls are positioned to experience discrimination that is an interplay of racism, sexism, and classism. This study engages intersectionality by examining how even seemingly productive paradigms, such as RJ, can be sites where racism combines with sexism and contributes to Black girls' marginality in school.

To operationalize these commitments, I utilized a critical ethnographic approach (Madison, 2005). While traditional ethnography focuses on examining the current state of what is, critical ethnography explicitly aims to go "beneath surface appearances, disrupt the status quo, and unsettle both

neutrality and taken-for-granted assumptions by bringing to light underlying and obscure operations of power and control" (Madison, 2005, p. 5). This approach was ideal for exploring how an RJ program ostensibly grounded by anti-racist, justice-oriented commitments could recreate rather than disrupt discipline inequities for Black girls. Combined, this theoretical framework and methodological orientation enabled me to center Black girls within this research and unearth mechanisms of social reproduction (Bourdieu, 2018) and injustices that limit their ability to experience freedom from oppression.

Data Collection & Analysis

This paper is based on a 2-year critical ethnographic study focused on examining the impact of schools and schooling on Black girls' identity formation. The study included the following methods of data collection: (a) participant and non-participant observation, (b) formal semi-structured individual interviews with Black girls and adult school personnel, and (c) informal conversations. During the period of study, I was the co-director of the restorative center and played an active role in the day-to-day activities at the school, which I systematically documented. The resulting data set included: (a) 100+ field notes from participant and non-participant observations that detailed interactions between school officials and Black girls within and across various school spaces, (b) detailed descriptions of restorative sessions, (c) interview transcripts from 18 school officials with accompanying reflective memos, and (d) school artifacts that constituted the print culture of the school.

Data analysis was ongoing and cumulative throughout the ethnography. Initially, I open-coded the data to re-introduce myself to JHS and my time in the field (Emerson et.al, 2011) Through this process, I regularly asked questions of the fieldnotes, conversations, and interviews to understand what Black girls viewed as significant in forming their identities. It is important to note here that though the girls were adolescents, I use the term girl because that is how they referred to themselves. The open-coding and question-asking sessions revealed the significance of discipline and RJ-related interactions in their meaning-making. I pursued this theme by creating several meta-matrixes that captured all data related to Black girls' interactions with the RC specifically and discipline policies more generally and engaged in focused coding of this sub-set of data. During this phase, I explored relationships among the coded data to develop theoretical connections and created integrative memos (Emerson et.al, 2011). To create robust assertions about the relationships I observed, I searched through the entirety of the dataset for affirmative instances and disconfirming cases. When warranted, my interpretations were nuanced to capture the breadth of data better.

Findings

The opening vignette featuring Candace demonstrated that despite a commitment to restorative justice, JHS still struggled to dismantle the practices that were the hallmarks of zero-tolerance discipline policies. In the sections that follow, I will argue that JHS' RJ program struggled to disrupt the existing disciplinary conditions for Black girls given (a) an inability to address legacies of racial mistrust, (b) a failure to adopt notions of respect as reciprocal and nonjudgemental, (c) and engaging in relational negligence. Although each struggle will be discussed separately, in reality, they were often experienced simultaneously.

Inability to address legacies of racial mistrust

One thing became immediately apparent in reflecting on my time leading the RC, re-engaging Black girls' disciplinary experiences, and reviewing the teacher interviews. There was a palpable presence of racial mistrust at JHS. Trust—the confidence that someone will act in a supportive, dependable, and consistent way—plays a critical role in the practice and effectiveness of restorative justice. It is the foundation upon which honest communication, expectations of respect, and relational ways of being are built (Evans & Vaandering, 2022). At the time of study, JHS had an estimated 300 students enrolled. Of those 300, 60% were Black (~25% female, ~35% male), 29% white, <1% Asian or Pacific Islander, 7% Hispanic, and 3% two or more races. Although most of the school was Black, there was not a single Black full-time teacher in the building; the entire full-time teaching staff was white except for one long-term substitute teacher. The support staff (i.e., counselor, social worker, etc.) was slightly more diverse, with two Black full-time staff members out of the seven. Nearly every teacher I interviewed at JHS spoke about struggling to build trust within their interactions with Black girls because of misconceptions related to their whiteness. When asked what challenges she faced in working with Black girls, Ms. Kemp maintained that Black girls' assumption that she would not understand their lives because of their racial differences was a significant hurdle. She stated:

> I mean, I don't have the same experiences that they have. So I wonder if sometimes they, "Oh, Ms. Kemp just does not get it." Like she's – you know? And I'm sure that's a thing, just because I don't understand all of the situations that they're experiencing. I understand a lot, like some of [what they are experiencing]. But oftentimes, I mean, I can be, like I come from a place where all of this drama, like that you get yourself involved with, you just need to like get it out of your head and you need to focus on this.

In her response, Ms. Kemp wasn't able to explicitly name her whiteness, which foreshadowed the level of "not getting it" that was to come. In discussing the girls' perceptions, she confirmed their suspicions. After admitting her lack of familiarity with their "situations," a code word for challenges related to their racial and class identities, she did not appear willing to try to understand them either. Instead, she stated that they needed to just "get it out of [their] head" and "focus" on what was going on in the classroom. Brushing aside their very real and very meaningful experiences as made-up drama and blatantly refusing to engage them in the "situations" they were navigating meant that she would remain ignorant about their experiences. She would never "get it" unless she intentionally decided to want to get it. Rightfully so, this ignorance would not lead girls to believe that she was likely to be a supportive adult for them.

Unlike Ms. Kemp, when asked the same question, Mrs. Mahoney could explicitly name her whiteness as a barrier. She stated in her interview:

> I think, in general, maybe more than I realize, there might be a, "Dang, another white teacher!" [Laughter] I could see that from their perspective, where they'd be like, "Well, there's just—you know, just another White lady in the line of all the other White ladies that I've talked to—taught me." And I can see where that would be a division [between the Black girls and the teachers] because they [don't] have a role model of somebody that might understand where they're coming from...But so—I do feel bad for the kids that there's not that connection for them. They should have a better connection like that.

Mrs. Mahoney perceived that Black girls viewed her as another white teacher in a long line of white teachers from their past who were unable to connect with them because they did not possess a deep understanding of their lives. She believed that, generally speaking, this perception led to division between the teachers and Black girls at JHS. Interestingly, Mrs. Mahoney maintained that she felt "bad" because the Black girls did not have same-race role models but did not articulate any efforts she, or other teachers, made to challenge these negative assumptions of their ability to understand and connect. Though she acknowledged they deserved better than what she was providing, she stopped short of interrogating the significance of their histories of interactions with white teachers so that she could explicitly address them and *actually* be better. A belief that racial matching was the only way that Black girls would experience the "better connection" with teachers that they deserved suggested that she had constructed a relationship ceiling whereby her engagement with Black girls would never reach that of white girls who shared her background and automatically positioned to have a better connection with her. Like Ms. Kemp, there was an apathy that Mrs. Mahoney embodied that enabled her to ignore the need to develop an awareness of the lives and realities of Black girls so that she could grow the necessary capacities to effectively build the trust that was lacking within their cross-racial relationship.

Similarly, Mr. Bryant named his whiteness as a formidable challenge in trying to develop trust with Black girls. He stated:

> I mean I was in the other class next door...but we were talking and a Black female student said that she was brought up to just think that all white people were the devil. And you've got kids who [believe that] that [white people] will trick you in a turn, they can't be trusted, and so, she's one of, I'm sure, at least a few people…So I guess I was not expecting that when I started teaching. I was not expecting this, being treated like I'm some cop out to get them. I was not expecting that, and I get that feeling a lot like they think I'm just someone trying to jam them up. I've found myself saying that on more than one occasion. I don't get up in the morning and put on a uniform trying to write people tickets. I get up in the morning to try and make you better in life and help you be successful...But they just think I'm here to jam them up.

Mr. Bryant felt that the Black girls in JHS prejudged his intentions as a white man. Rather than believing that he was trying to support them to be successful, he believed they viewed him as embodying the trickster nature of the devil and the predatory nature of the police. Though Mr. Bryant didn't expect it, I wonder, why not? What would compel Black girls to categorize white teachers differently than other white people in their lives if they experience them similarly? Particularly so when schools increasingly mimic the criminal justice system and subject students to conditions where they are subjected to heavy surveillance and harsh punitive practices at the hands of predominantly white adults (Smith, 2016; Wun, 2016)? Much like Ms. Kemp and Mrs. Mahoney, Mr. Bryant resigned himself to these presumptions rather than critically reflecting on why the histories of Black terror by white adults in positions of power matter to teaching relationships and undoubtedly inform their reticence to enter into trusting relationships. Like the others, he did not seem poised to engage Black girls in ways that would develop trust between them. Instead, the responsibility fell onto Black girls to believe, through no intentional engagement on his part, that he was who he said he was and that his intentions were pure.

Conversations I had, as well as interactions I observed with Black girls, confirmed a mutual feeling of mistrust between themselves and their teachers. Consider this following interaction between a group of 10th-grade Black girls and their teacher, Ms. Simpson after the whole group had been kicked out of class to the RC for inappropriate cell phone use.

> Jana: (to Ms. Simpson) You see us doing good, getting our work done and there is Marvin on the phone and you don't say nothing to him.
>
> Candace: They don't want us to do better
>
> Anastasia: Sho don't
>
> Jana: You want us to be in the same class again, but no, I'm getting my credit and getting out.
>
> Simpson: This conversation should be held when you are not so angry (begins walking out of the RC)
>
> Jana: I'm not angry
>
> Anastasia: They act like…ooo (sucks in air) they don't like Black people. They don't like Black girls… because we can wear weave
>
> Candace: They wore them before us! But now they are mad because Black girls do it better!

After being kicked out of class for using her phone, Jana tried to express to her teacher how other students were treated differently. All three of the girls were adamant that, at its core, it was due to her, as a white teacher, not wanting them to experience success. At the mere mention of race being the motivating factor in how she treated them, Mrs. Simpson promptly deflected by using stereotypes of Black girls as irrationally angry to delegitimize their conclusions. She physically could not be in the same room where Black girls had named her whiteness as a motivating factor in her disciplinary decisions. In a dashing show of white fragility (DiAngelo, 2016), Mrs. Simpson simply shut down the conversation with them rather than engage the girls' perspectives and actively chose to disengage. Her mischaracterization of their advocacy as anger, withdrawal from the conversation, and her writing them up in the first place all signaled to them that Ms. Simpson, as a representative for the other teachers in the school, simply did not like Black people or Black girls. On the surface, the reason being that they wore weaves better may seem trivial. However, Candace's comments make clear that it was indeed about the fact that she perceived white people to feel a type of way when Black people, in this case specifically Black girls, achieved excellence in a presumably white domain. Overall, the girls did not trust that their white teachers were invested in their achieving success and were envious of them when they did.

While Mr. Bryant specifically lamented the fact that he did not come to school every day to "jam" the girls *did* believe the teachers were out to get them specifically. For example, one day during transition time, I ran into Kay in the hallway on her way to the RC. When I got within earshot, she said loudly, "I hate white teachers". When I inquired what was happening, she showed me a referral that marked her as insubordinate. She shared that it was because she was in the hallway using her phone and refused to give it up when asked. She asked me a rhetorical question about

whether the principal said they could use their phones during the passing period. I answered yes, and she immediately said, "Exactly". The matter-of-fact tone that accompanied this statement conveyed her confusion about why she was being held to a different standard. It appeared to her to be the doings of the white teachers in the school. As both teacher and student comments reveal, across JHS, there was a lack of trust between them that was directly related to their racial differences. This mistrust significantly compromised the potential for strong relationships to develop.

Failure to adopt notions of respect as reciprocal and nonjudgemental

In addition to trust, respect is foundational to any restorative justice model in or out of schools. Within an RJ paradigm, respect signals the presence of high regard for all members of the community and acknowledgment of each other's inherent worth and dignity. Evans and Vaandering (2022) define respect as accepting people for who they are and not measuring them—judging them against expectations of who you think they should be to mold them into the version of themselves that makes your life easier or fits your needs. For Black girls specifically, resisting the inclination to measure would look like recognizing, challenging, and working intentionally to dismantle stereotypes about them that villainize, pathologize, and plain old lie about who they are and what they are about.

It was acutely evident that the teaching staff in JHS did not embody this kind of respect for Black girls. Given their feelings that their whiteness made it difficult for Black girls to develop trust in them, you can imagine that they may have chosen a course of action where they worked intentionally to demonstrate an ability to hold Black girls' feelings, ways of life, and traditions, in high regard, *especially* as white teachers. However, the teachers at JHS chose a different route. Unable to see and honor Black girls without judgment, the teachers' use of the RC demonstrated their hyper-focus on fixing them through school discipline.

To situate the teachers' use of the RC, we must first understand how they imagined Black girls in the school more broadly. When asked to speak about challenges, Mrs. Fitzgerald, stated the following

> Challenges that they face at this school are knowing and honoring and respecting what acceptable behavior looks like in a professional environment. I don't think they know about you know kind of code switching or a behavior or language…You know respecting the space, respecting the environment in such a way that - I think it has a lot to do with control. That they're trying to get some control over something that maybe they don't have control over. So they're trying to control their environment here. I don't know. Just guesses.

In answering the question about what challenges Black girls face, Mrs. Fitzgerald's answer could be boiled down to one word: themselves. She believed that the girls did not know how to "honor" the behavioral norms of the "professional" school environment due to a lack of code-switching in their behavior and language. Her comments implied that the girls' ways of being outside school were incompatible with the "professionalism" school spaces required simply because they refused to accept a position characterized by limited power and control. She believed that they were intentionally engaging in ways they knew would disrupt the "appropriate" power structure of the school. This perception of Black girls as striving for control that does not belong to them is analogous to decades-old derogatory racial tropes about Black women that have suggested their excessive thirst for control is the cause of the demise of the Black family and their individual oppression (West, 1995).

Mrs. Mann similarly suggested that Black girls' aimed for control that did not belong to them. When I asked her about the challenges Black girls faced, she responded:

> Sometimes their self-advocacy, it's too much for me. Like, sometimes they – especially the ones that want to get really good grades, um, want to do it without, like, okay, demand too much from me to be re-grading assignments or grading assignments that were late.

Mrs. Mann appeared overwhelmed by Black girls' ability to advocate for themselves. At an earlier point in her interview, Mrs. Mann situated self-advocacy as a strength. Interestingly, here, she converted this strength into a negative quality. Rather than view the girl's attempts to secure the opportunities and resources necessary for success in a positive light, she positioned it as becoming a nuisance of sorts when it resulted in requests for information related to assignments and grading. Though, to some extent, her comments evidenced a belief that some Black girls desired to do well in school, what good would their desire be if situated within a classroom context where it was perceived as overly controlling behavior?

In a departure from Mrs. Mann and Mrs. Fitzgerald, when I asked Mrs. Taylor to speak about the biggest challenges for Black girls, she immediately noted it was school drama. She stated,

> Way too much girl and guy drama. Way too much. If we only had that magic touch to get them to focus on their academics and their education and not the my guy's looking at this girl and this girl's looking at that guy, because the bottom line is they all have to be responsible for themselves in their life and… No one's gonna take care of you. You have to take care of yourself. What does that look like intellectually? What does that look like for your future career? And they're just so into the, "Oh, my boo's gonna take care of me." [Laughs]

She suggested that Black girls were singularly focused on dating relationships in school. In her estimation, they did not put the girl/guy drama aside to prioritize their education because they believed they would eventually end up in a relationship where their significant other took care of them. Thus, rather than invest in building "responsibility" for their own lives, they invested in their relationships with significant others out of a misguided belief that these relationships would do them more good than their education would in the long run. The belief that Black girls were not academically ambitious goes against what we have heard from the girls whose stories have been shared in this paper thus far. Her perceptions of their academic and romantic aspirations suggest that Mrs. Taylor was making sense of Black girls at JHS by relying heavily on the stereotypes of Black women as a "gold digger"— a woman whose primary ambition in life was to secure a partner to take care of her (Ross & Coleman, 2011; Stephens & Phillips, 2003).

Mr. Richards acknowledged the ways stereotypes infiltrated the thinking of staff at JHS most clearly. He shared:

> But—so I think I do, initially, the same way that, you know, being humans and categorizing things and therefore people, I think in the same way that some African- American females get categorized by people as, you know, there's preconceived notions there somewhere...So I think initially, that causes—that might cause some tension here and there or some issues or whatever.

It was not just the white teachers that held these deficit views. In an impromptu conversation with Ms. Collins, a Black support staff member, I excitedly shared some of the community-based initiatives we hoped to launch through the RC. In her response, she focused on what it might mean for me, as a Black woman, to be at the helm. She thought my leadership would be "good" because someone needed to "work with the girls and teach them how to be ladies because they surely [did not] know how." Rather than seeing value in the larger goals of the center to work toward institutional change, her hope seemed to be that the "good" work would be some sort of individual intervention to fill girls with the makings of an appropriate feminine identity that they lacked. Ms. Collins' focus was disheartening but not surprising. Schools exemplify standards of femininity that are closely aligned with white middle-classness through their behavioral expectations and constructions of the "good student." As such, Black girls are likely to find themselves in school contexts where their Black feminine identities are devalued, seen as outside of school norms, and rendered problematic (Neal-Jackson, 2018, Wun, 2016).

As these conversations demonstrate, instead of engaging respect for Black girls that challenged stereotypes about them, the teachers and staff at JHS recreated them in how they constructed Black girls' identities and capacities in the school. These deficit perceptions of Black girls' academic and social demeanors informed how the teachers used the RC. While Black girls only made up 25% of the school population, they made up over 80% of the referrals to the RC. On the referrals, the teachers most often cited Black girls for being "insubordinate" and "disrespectful." The conduct that supported these labels were minor misbehaviors, such as unsanctioned use of electronics, tardiness, and talking during the lesson. It is unimaginable to think that Black girls were the only students in the school who engaged in this kind of misbehavior during class time. The range of minor behaviors that were read as insubordinate when Black girls engaged in them and not when other students behaved similarly demonstrated the intensity with which teachers perceived Black girls through a deficit lens. This was directly related to the unique set of inadequacies teachers identified early as present within Black girls. As they were the only ones being reprimanded for these minor infractions, at least in ways that included the use of the RC/RJ practices, it reinforced notions for Black girls and others that something was wrong with them because they were consistently positioned as not correctly engaging in school. The repeated use of these subjective categories signals that a primary concern of teachers was to use the RC to compel Black girls to change in ways that would register as more compliant with their wants and desires. As defined by Evans and Vaandering (2022) earlier, this "measuring" is antithetical to authentic notions of respect in RJ.

Relationship Negligence

The failure to develop trust that could work through legacies of racial mistrust and the failure to reject racial tropes that did not respect Black girls' personhood worked together to support the final area I will discuss regarding why JHS struggled to implement an RJ program for Black girls—relationship negligence. The formation and sustenance of deep relational bonds among school community members is core to RJ practice in schools (Morrison & Vaandering, 2012). Strong, healthy relationships help build the desire to engage in the school community positively, making conflicts less likely to happen. Importantly, when conflicts occur, strong relationships help to support honest communication and accountability. Unfortunately, the teaching staff at JHS did not prioritize building these relationships and relied on outside individuals to mediate their relationships with Black girls. I describe this as relational negligence because they made little effort to establish connections with Black girls on their own and expected that me and Mr. Ferguson, in our capacities

RC directors, would be the ones to mediate their interactions, and ultimately relationships, with Black girls.

The relationship negligence was evident first and foremost in their use of the RC to address basic-level indiscretions, as demonstrated in the previous section. Minor misconduct, such as unsanctioned use of a cell phone, tardiness, and talking during the lesson, demonstrated the teachers' unwillingness to engage Black girls or a limited capacity to do so (at best). Because it is unimaginable that Black girls were the only students to engage in these behaviors that are typical of adolescents in high school classrooms, these very same teachers *had* developed a toolkit to support their responses to other students. It was just Black girls for whom they had no tools or for whom they perceived the tools to be insufficient. Consequently, the types of misconduct for which Black girls were being referred to the RC spotlight the overreliance on the RC because these routine areas of classroom management should not have required the level of intervention that the center provided.

Another way that teachers demonstrated relational negligence was in their treatment of Mr. Ferguson and me as though we were security guards. We were often called to classes and asked to remove girls from the learning environment without further requests or expectations of participation in a restorative process where they and the girls could better understand the root causes of the conflict. There was an out-of-sight, out-of-mind energy during these moments. Even as I navigated these requests in the moment, it was clear that removing the girls as teachers desired was recreating the exclusionary disciplinary practices we hoped to dismantle. And yet, because RJ practitioners were being called on to facilitate the removal, it fasely legitimized the action as part of a restorative process. I knew then and now that forcibly sending a student to the RC in this way was simply an in-school suspension by another name. An interaction with Ms. Simpson demonstrated how these requests for RC "security" often played out. On this particular day, Mr. Ferguson and I were returning from a classroom when Ms. Simpson stopped us in the hallway.

> Simpson: Can you help? I have a student who is refusing to leave the class? It's Anastasia…She's refusing to leave the class.
> Alaina: Why is she being asked to leave?
> Simpson: (pause—taken aback by my question it seems) Well, she is being very rude. Mrs. Fitzgerald told her to put her phone away several times and she refused, and then she was asked to leave and she would not. Then she started cursing under her breath, you know. You know she will deny it if you ask.

At the core of this interaction was Ms. Simpson's desire for me to force Anastasia to leave the classroom because she (and possibly Mrs. Fitzgerald) felt that Anastasia was being insubordinate and ill-mannered. Neither she nor Mrs. Fitzgerald felt they had the tools to navigate a basic situation where a student was on their phone without permission and perceived the only way forward to using their power to remove her entirely from the classroom. Her pause at my question of why Anastasia was being asked to leave in the first place signaled an assumption that when requested, students would be automatically removed because there could be no reason why such a request would be invalid. Her pause may also have been a recognition that I could see that her goal for my involvement in the situation was not to support her in building the skills and capacities necessary to achieve resolution with Anastasia, or other students for that matter, but simply to get her out of the classroom. Nothing was mentioned about Anastasia being a distraction to others, so it seems the removal had everything to do with Mrs. Simpson (and possibly Mrs. Fitzgerald) feeling personally

offended. If I extend grace to Mrs. Simpson, I can acknowledge that she knew of my relationship with Anastasia. She also knew the kinds of care and support students received in the RC and possibly wanted that for Anastasia when she was clearly upset (Davis & Neal-Jackson, 2022). However, grace aside, the point here is to notice her reliance on my existing relationship with Anastasia in order to navigate her own.

In reducing the restorative process to the removal of students from their learning environments with no opportunity to uncover the core roots of conflicts, it was apparent that teachers were not fully committing to building the kinds of relationships with Black girls that are central to RJ. Talking with them during their interviews revealed that this was because they were waiting for the relational work of navigating conflict to be done *for* them, primarily by me as a Black woman. In his interview, I asked Mr. Clark what he did when there was conflict with Black girls. His response was:

> Clark: I just send them to you.
> Alaina: Yeah. Give them to us. Give them to us (said sarcastically)
> Clark: Yeah. No. I really think you guys are doing a really [good job]

He continued to say:

> It's like if I send them to you, I know that they're gonna come back happier and more intact mentally, less angry, you know?

For Mr. Clark, when he experienced conflict with Black girls, he chose to delegate the work of navigating it to us in the RC. His praise of our work clearly signaled his lack of involvement and an awareness that he could take no credit. He fully expected *us* to engage with the girls in a way that would leave them more "intact" *absent his involvement.* He did not seem to have any idea as to what that process would be, but was nevertheless confident that we could, and would, do it. He was content to let us take on all of the work of helping the girls navigate their relationship with him while remaining ignorant himself. What he failed to see was that if the girls did in fact return to class happier, more mentally intact, and less angrier, it had nothing to do with him or an indicator of a fully restored relationship. He saw students who chose to prioritize themselves in that moment and were learning how to play the game of schooling in ways that would serve them better. It was not a reflection that all was well between them.

Mr. Chase also demonstrated an expectation that the relational work would be done for him in the RC. During his interview, he talked about the RC in the following way:

> You see that maybe sometimes, in the sense that – and I've done it too, just use it as a dumping ground like, 'Get out of the room right now, please, and go over there,' instead of, 'Do what you're supposed to do."

Much like Mr. Clark, Mr. Chase released Black girls to experience processes within the RC that he was unaware of and did not seem to care to want to learn about. The connotation of a "dumping ground" suggested he was using the RC to habitually discard or offload unwanted problems, in this case, navigating conflict with Black girls. This phrasing suggested he saw the RC as a space where we would take on his burdens and unwanted tasks. Mr. Chase and others would never develop strong relationships with Black girls if they continually expected the important relational work would be done for them. Navigating moments of conflict through the restorative process would have allowed

them to learn about Black girls' perspectives and experiences and their role within them, leaving them all with a greater understanding of one another. They were mistaken if they believed that the work of building and maintaining a relationship could be done by someone else.

In closing, Ms. Taylor astutely captured this particular challenge in JHS. She shared:

> *We need to have more conversations because in my eyes the Restorative Center was never meant as a – only the students apologize. It was meant to figure out what the problem is, everyone be honest and you both have to work. It's give and take on both parts. That's not happening."*

Indeed, teachers were not fully committed to the give and take that was required in RJ when it came to Black girls.

Discussion

Within US public schools, Black girls are increasingly experiencing higher rates of discipline (Hines-Datiri & Carter Andrews, 2020)). Rather than experiencing the freedom to simply walk down their school hallways immersed in a carefree conversation with friends, more and more Black girls are ending up suspended, expelled, and sent to juvenile justice facilities (Morris, 2022). Amid this reality, schools have been increasingly turning to in-school restorative justice (RJ) programs to interrupt these patterns of punitive discipline because of their focus on addressing racial injustice. Despite the promise of RJ programs, schools struggle to implement them with fidelity for Black girls. In Michigan, the increase in the use of restorative practices has not led to a decrease in the rates of suspension and expulsion for Black girls (Molloy, et al., 2024). This paper explored why one school, James High School (JHS), struggled to implement an RJ program for Black girls in particular.

The analysis showed that the root of JHS' struggles could be traced to an inability to engage, with fidelity, the foundational principles of restorative justice. First, the white teachers minimized the legacies of racial mistrust between Black girls and white people, including teachers. Nearly all of the teachers suggested that Black girls unfairly perceived that white teachers, by virtue of their whiteness, were automatically untrustworthy. They argued this made it hard to build relationships with them. They situated their whiteness as benign and felt that when Black girls were able to look past *their own bias* and see them for who they were—good white people working in the good and noble profession of teaching in a predominantly Black school— they would offer teachers the trust that should have come automatically. The responsibility for overcoming this racial divide was squarely on the shoulders of the Black girls. But can you be a good, white person in a system that is predicated upon racism and other forms of oppression if you do not consider the ways you participate, knowingly or unknowingly in that system? If you can't acknowledge that being white in a society and school system where Black girls are routinely mistreated means your race *will* matter to the kinds of relationships you develop with them? If you can't see past your fragility to take what Black girls articulate about how they are experiencing their interactions with you as meaningful and worthy of consideration (DiAngelo, 2016)? Unfortunately, the teachers struggled to build trust with Black girls because they never saw it as their job to engage the girls in ways that would bridge the gap. Instead of addressing "the elephant in the room," the teachers ignored racial discord as much as they could and did not work intentionally to overcome it. It remained the issue that no one wanted to acknowledge or discuss, opting to ignore it, look around, over, and under it (Howard, 2021).

This would never lead to successfully implementing an RJ model poised to intervene on zero-tolerance discipline policies and practices. Winn & Winn (2021) argue that explicit and sustained focus on justice, equity, transformation, *and race consciousness* is necessary to transform discipline through restorative justice. Ignoring race and racism is akin to attempting to build a brand-new house on an old, jacked-up foundation. It is foolish to think that the new home —a system for building community and productively addressing harm—would stand tall and strong without a firm foundation. Within RJ, that foundation is a commitment to naming and dismantling the systems that continually disadvantage Black people and attempt to make their confinement inevitable (Davis, 2019). What was happening in JHS, and will happen in other schools like it, is that the willful ignorance about the relationship between race and restorative justice will lead to failure both in the criminal justice system *and* schools (Gavrielides, 2014).

Furthermore, the teachers could not engage RJ's call for respect amongst all community members. Respect should be experienced as non-hierarchical, reciprocal, and earned (Lawrence-Lightfoot, 2012). It does not mean deference to another individual, given their status or presumed authority. Respect is present when you can see and honor someone's inherent worth and dignity by not measuring them against your standards and judgments. For Black girls, this would have looked like challenging stereotypes that distort their identities and capacities, actively affirming their aspirations and expressions of self, building them up and not tearing them down through word and in deed, actively engaging their perspectives, concerns, and ideas, and providing space for their autonomy. Yet, the teachers in JHS appeared to be singularly focused on labeling the girls and securing compliance with their expectations over and above, engaging in ways that would demonstrate a desire to acknowledge their inherent worth and dignity. As evidenced through their use of the restorative center to police Black girls' minor indiscretions as well as their articulations of the challenges Black girls faced, it was clear that they held deficit orientations that supported their desire to focus on changing the girls to be a more quiet, more muted, more silent, more docile, more agreeable version of themselves. This demonstrates an adherence to the familiar racist tropes that position Black girls (as future Black women) as inadequately feminine, unacademic, socially incorrigible, and whose only hope is the correction that comes from institutional coercion (Wun, 2016). As with trust, respect is essential to the foundation supporting an RJ paradigm shift. While JHS, in establishing the RC, signaled its support of RJ and planted seeds from which relationships may grow, without respect—an earnest commitment to honoring one another as we are and for who we are—whatever sprouted would never flourish. Absent respect, there would be no emotional safety to support honest communication, no collaborative problem-solving, and limited desire to take accountability, all of which are essential to developing an RJ model that can intercede on the disparities Black girls are facing.

Lastly, teachers in JHS struggled to implement an RJ model because they were relationally negligent of Black girls. They situated the most critical work embedded in RJ—developing trust, communicating around root causes of conflict, and engaging in reciprocal respect—as work for someone else to do or not to be done at all. The teachers may not have known how to do this work with Black girls. Maybe they felt constrained by time. It might have been that they simply assumed that I, as a young Black woman, would do a better job. Whatever the rationale, the reality was that they relied nearly exclusively on a third party to act as a mediator of sorts. Similar to what Lustick (2021) found in her study, by relying on the strengths of my relationships with the girls (that I achieved by engaging in the very processes of building trust and earning the respect that the teachers refused to do), the teachers reduced RJ from systemic paradigm shift to a person-specific intervention. And apparently, they weren't the people who would be doing the work. This went

directly against the core principle of keeping relationships central. Within RJ, relationships and relational ways of being are non-negotiable. Without them, the restorative justice we are counting on will not amount to transforming our classrooms and schools.

Conclusion

This paper argued that without explicitly and intentionally engaging in the philosophical foundations that guide RJ practice, schools will inevitably recreate the power relationships and subsequent discipline disparities they are trying to avoid (Vaandering, 2014). Ultimately, within JHS, sampling pieces without a firm grounding in the core values left teachers without a path toward true transformation. This led to them co-opting the restorative processes to resemble traditional school discipline. This work pushes scholars and practitioners interested in school discipline to deeply consider the real-world factors that compromise the transformational potential of restorative practices. Future research should examine how schools with demographics like JHS address racial discord to implement RJ programs successfully. Additionally, this research could examine what it takes to build a community that is deeply committed to the philosophy of restorative justice and lets that philosophy guide its decision-making at every point.

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Examining Trends and Patterns in K-12 Security Expenditures in Texas

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Examining Trends and Patterns in K-12 Security Expenditures in Texas

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Abstract

Despite growing concerns about the harmful effects of "hardening" schools through increased police and surveillance on school campuses, little research has examined trends in financial resources allocated to these programs, practices, and personnel. This study contributes to the literature by analyzing trends and patterns in school security spending across K-12 public school districts in Texas. Using district-level expenditure and demographic data from the Texas Education Agency, we employed descriptive quantitative analysis to investigate changes in security spending over time and across districts with varying characteristics. Our findings reveal a significant increase in security expenditures statewide, with inflation-adjusted spending tripling from $21 to $64 per pupil between 2007 and 2022. This growth outpaced increases in spending on other support services like health, social work, and counseling. Across districts, security spending varied by geographic location, enrollment size, and student racial and socioeconomic composition. Districts serving the highest percentages of students of color and economically disadvantaged students consistently spent the most on school security. These findings raise critical questions about the factors driving school security expenditures and its potential implications for student safety and racial justice.

Keywords: K-12 School Safety, K-12 Security, K-12 Security Expenditures, K-12 Security Spending

Introduction

As violent threats to student safety persist and grow (Rapa et al., 2024), educational leaders have sought to implement policies, programs, and practices that protect students (Zabala-Eisshofer et al., 2024). For many districts, the typical response has been to "harden" schools (James, 2022), a school safety strategy that relies on an increased presence of armed security or police on school campuses and surveillance technology like metal detectors, cameras, and facial recognition technologies (James, 2022).

Today, little is known about the extent to which schools have committed to the strategy of "hardening" schools, or the rate at which this strategy has grown. In this article, we contribute to the literature on school safety by examining resource allocation trends and patterns related to programs, practices, and personnel that "harden" schools (Avila-Acosta & Sorensen, 2023; DeAngelis et al., 2011).

Our study was guided by the following research questions:
1. How have district security expenditures changed over time, and how have spending patterns changed relative to other educational spending categories (e.g., health, social work, and counseling)?
2. How have school security expenditures varied across districts, particularly when considering the variation in associations between security expenditures and district geographic locations, enrollments, student educational needs, and demographics?

To answer these research questions, we drew on district-level security expenditure and demographic data published by the Texas Education Agency (TEA) and descriptive quantitative analysis. We find that inflation-adjusted school security expenditures in Texas have increased significantly, rising from $21 per pupil in 2007 to $64 per pupil in 2022, a 205% increase. This growth also represents a larger proportion of total operating expenditures, doubling from 0.4% to 0.8% of total operating expenditures. Districts located in large cities spent more on security per pupil, but suburban, town, and rural districts have also increased their security spending significantly in recent years. Within regions, districts with higher percentages of students in poverty and students of color spent the most per pupil on school security. Our findings raise questions about the effectiveness and potential unintended consequences of spending on school hardening strategies, particularly for marginalized student populations. Additionally, our findings suggest a need for policymakers and educators to carefully consider the balance between security measures and other student support services, as well as to monitor the distribution of security spending across different types of school districts.

Literature Review

While the approach of hardening schools to improve safety has not yet shown signs of effectively reducing violence on school campuses (Flannery et al., 2021; Jonson, 2017), scholars have found that it has increased the use of exclusionary disciplinary practices that disrupt learning (Chambers, 2022; Scott et al., 2017; Tocci et al., 2024). This outcome is observed disproportionately more often for Black and Brown students (Fisher et al., 2020; Scott et al., 2017) and often occurs because school and district leaders often design and implement school safety systems in ways that impact other aspects of schools, such as approaches to school discipline (Burch, 2022; Eckes & Russo, 2012; Fisher & Devlin, 2024; Mallet, 2016; Turner & Beneke, 2022; Zabala-Eisshofer et al., 2024).

Burch (2022) shows that in the years since the earliest school shootings, schools have become increasingly reliant on policies, practices, programs, and personnel focused on hardening schools, resulting in organizations that perpetuate, instead of disrupting, the school-to-prison pipeline. This includes hiring armed personnel, implementing harsher disciplinary practices, and adopting disciplinary and behavioral intervention programs that attempt to deter students from engaging in risky behavior. In recent years, schools and districts have also sought to implement policies that increase surveillance of students, such as through the use of facial recognition technologies and cameras (Andrejevic et al., 2020; Kupchik et al., 2009).

Several studies have examined why district and school leaders continue to invest in resources to harden schools. School and district leaders are often pressured by parents and families to respond to threats of violence, and with no simple solution, leaders have often responded by hardening schools. Justifications for these moves often involve discourse suggesting school hardening, particularly the presence of school resource officers (SROs) on campus, are in the interest of racially minoritized students because students receive mentoring and SROs can address racism in schools (Turner & Beneke, 2022). The choice to harden schools has also been influenced by state and federal policies designed to provide additional funding for school safety (Brock et al., 2018; DeAngelis et al., 2011). Federal policies, for example, have targeted hiring armed personnel and increasing access to surveillance technologies (Brock et al., 2018). Similarly, state funding policies for school safety have often sought to increase security personnel (Burgess, 1997; Devos et al., 2018).

Despite widespread critique of these investments and how they contribute to the "school-to-prison" pipeline (Chambers, 2022; Scott et al., 2017; Sorensen et al., 2023; Tefera et al., 2022; Tocci et al., 2024; Welton & Harris, 2022; Wiley, 2021; Williams III et al., 2023), little research has examined the level of financial resources allocated to maintain school hardening practices and personnel in K-12 public schools. Our study contributes new insights into the trends and patterns in school security spending across Texas school districts, focusing in particular on how school district expenditures have varied over time and across school districts serving different student populations. Prior studies have examined both the source of revenues supporting school hardening and the allocation of financial resources across and within school districts (Avila-Acosta & Sorensen, 2023; DeAngelis et al., 2011). This study offers new important insights regarding spending on school security resources and programs in the years during which evidence about the "school-to-prison" pipeline has emerged.

Theoretical Framework

Our study aims to understand variation in school security spending over time and across school districts. To provide theoretical grounding for this analysis, we draw on a range of theories explaining why school security spending has varied temporally and geographically. These theories span from traditional resource allocation models (Goertz & Stifel, 1998; Picus & Odden, 2011), which tend to be more linear (i.e., resources are allocated to address a specific need), to critical theories that consider the broader sociopolitical context and history informing spending patterns across districts (Apple, 2019; Diem et al., 2014; Turner et al., 2024).

From a traditional perspective, security spending is expected to vary over time and across districts according to the diverse needs districts face. As the threat of violence increases, spending on security is anticipated to rise. This pattern is analogous to federal and state policy responses that increase spending on school police and police resources at schools following a school shooting. Furthermore, as the perceived threat of violence fluctuates, schools might be expected to adjust their spending on security accordingly.

However, from a critical perspective, we must also consider that perceptions of threat and violence, and the resources allocated to respond to those threats, are deeply entangled with the sociopolitical and historical realities of racial segregation, disinvestment, and over-policing of communities of color in the United States (Simson, 2013; Turner & Beneke, 2022). Therefore, as we explore variations in expenditures across school districts in Texas, we remain cognizant of two key factors: (1) how resources are allocated to address needs, such as school security, and (2) how observed patterns in resource allocation are intertwined with racism and economic inequities in the United States. Attending to this relationship is particularly crucial in light of mounting research pointing to the harmful impact of racially disparate disciplinary outcomes observed in schools pursuing a strategy to harden school campuses.

Context – Texas

The state of Texas served roughly 5.5 million students in the 2022-23 school year, making Texas the second-largest system of K-12 public education in the country. The state has over 1,200 public school districts, which vary in size, regional location, and student demographics and educational needs. Table 1 reports summary statistics for districts in Texas (note: all tables and figures are presented in Appendix A of this article). Like most states, Texas' enrollment is mostly concentrated

in its city (or urban) and suburban school districts. City school districts also tend to serve a higher percentage of students of color, English language learners, and economically disadvantaged students.

In terms of security spending, Texas requires all districts to report both the amount of spending on school security – the amount of spending on the "function" of school security – and the resources procured through expenditures – the amount of spending on various "objects." These objects could include items like personnel, security resources (such as cameras or metal detectors), and other resources (such as transportation or computers). On average, rural school districts spend the least on security at roughly $25 per pupil, while towns spend about $42 per pupil, and city and suburban school districts spend approximately $58 and $60, respectively. Across all districts, there is significant variation in the amount of per pupil spending. On average, districts in Texas spent about $37 per pupil on school security, with a standard deviation of $50 per pupil.

In recent years, the state has increased funding specifically targeted at supporting school security personnel, programs, and resources. Three instances stand out in which the state increased funding following two highly publicized school shootings. In 2018, the state legislature allocated an additional $100 million for school security following the tragic shooting at Santa Fe High School (2019-2021 School Safety and Security Grant). The state then allocated an additional $17 million to support the purchase and installation of silent panic alert technology in schools (2022-2024 Silent Panic Alert Technology (SPAT) Grant). Also in 2022, the state allocated an additional $400 million in funding for school security after the tragic school shooting in Uvalde at Robb Elementary School (2022-2025 School Safety Standards Formula Grant).
The context of variation across district characteristics in Texas, and the recent state-level responses to school shootings, provide an important backdrop for our analysis of school security spending patterns in Texas. By examining how these expenditures have changed over time and across different types of districts, we aim to shed light on the factors associated with resource allocation decisions and their potential implications for educational safety and justice.

Research design

Data Sources

We drew on TEA's Public Education Information Management System (PEIMS) data, which covers approximately 1,200 K-12 charter and school districts in Texas from 2007 to 2022. We utilized district-level expenditure information, including categories like instruction, school leadership, transportation, security, and health services. In this study, we focused specifically on "function code 52," which encompasses spending on resources and programs for securing school premises and school-sponsored events (TEA, 2020, p. 83-84), which includes expenditures for security personnel (e.g., school resource officers), school security equipment (e.g., metal detectors and cameras), and other programs and capital expenditures (e.g., trainings and transportation). We also relied upon data published by the National Center for Education Statistics (NCES) on district characteristics, including geographic location, student demographics, and student educational needs. Additionally, we drew on the Comparable Wage Index for Teachers (CWIFT) to adjust for differences in costs across school districts in Texas. The data relied upon does not include the most recent security grants allocated by the state of Texas, as those grants were allocated at the end of the 2021-2022 school year.

Methods

We relied on descriptive quantitative analysis to answer our research questions, utilizing both summary statistics and visualizations to understand how expenditures varied over time and across districts with varying characteristics. We present our results and visualizations in Appendix A of this article. Specifically, we focused on the ways in which district-level factors, including student demographics, geographic location, and surrounding community characteristics, were associated with changes in security spending. To answer our research questions, we focused our analysis at the district level. We chose to focus on average district financial allocation for security because the responsibility for allocating resources typically lies at the district level.

We organized our analysis into two parts. First, we focused on district-level trends and patterns in security spending across districts in Texas. Our first analysis aimed to understand how inflation-adjusted security spending has changed over time, how the share of security spending as a fraction of total operating expenditures has changed over time, and how security expenditures have changed relative to other expenditure categories associated with student safety and well-being (counseling, social work, and health).

The second part of our analysis focused on variation in security expenditures across school districts. Here, our goal was to understand how uniform or varied resource allocation practices are around security resources across school districts in Texas. We were also interested in understanding which characteristics were associated with security expenditures. For this reason, our second analysis relied on a descriptive analysis of district-level security spending data and district-level characteristic data. We explored how security expenditures varied across districts located in different geographic areas of Texas, how expenditures varied for districts of different wealth and racial compositions, and how they varied for school districts of different enrollment sizes. Our exploration of the association between security expenditures and different district characteristics is guided by our theoretical framework, which points to potential district-level factors that may drive security spending. Traditional factors may include district size and the potential exposure to a threat. Alternatively, critical considerations of associations between variables like race and economic status and security spending help to answer questions about the sociopolitical factors shaping security spending and potentially exacerbating racial disparities in exposure to the harms of "hardened" schools and the school-to-prison pipeline.

Through this two-part analysis, we aimed to provide a comprehensive understanding of the trends and patterns in school security spending in Texas, both over time and across different types of districts. By examining these patterns in light of our theoretical framework, we seek to shed light on the factors driving resource allocation decisions and their potential implications for educational equity, as outlined in our research questions.

Results

Statewide District-level Patterns and Trends

In Texas, district-level spending on security has increased steadily since 2007. In 2007, spending per pupil across all districts was roughly $21 per pupil. In 2022, inflation-adjusted spending tripled to over $64 per pupil. Inflation-adjusted average spending on security across districts in the state shows that spending has increased by over $43 between 2007 and 2022 (Figure 1). In each of those years, spending on security has become a higher percentage of total district operating expenditures. Despite this growth in the share of total per pupil expenditures, however, spending on security

remains a small part of total district operating costs (Figure 2). In 2007, security expenditures made up between 0.2 to 0.4% of total operating costs. By 2022, the share of total operating expenditures spent on school security had surpassed 0.8%, more than doubling in 14 years. The rise in spending on security and in the share of total spending suggests both that restricted funding intended specifically for the purpose of education has increased, as well as the priority of security expenditures in schools.

When compared to other expenditure categories that have traditionally been associated with support services that promote student well-being and safety (health, social work, and guidance and counseling), growth in spending on security and monitoring has outpaced these other expenditure categories (Figure 3). In the period between 2007 and 2022, spending on social work services grew from $5.39 per pupil to $6.16, a change of 14.3%. Spending on health grew from $64 to $77 per pupil, a change of 20.3%. Spending on guidance and counseling services increased from $172 to $186, a change of 8.1%. In 2007, districts in Texas spent about $21 per pupil on security and $241 on health, social work, and guidance and counseling. The ratio of security spending to health and well-being spending was approximately 1 to 11. In 2022, spending on security was $64 per pupil and $267 on health, social work, and guidance and counseling. The ratio of security spending to spending on health and well-being shifted to 1 to 4. The change over time in expenditures across categories is presented in Figure 4.

Patterns and Trends across Districts in Texas

While average district-level spending on security expenditures increased across Texas' districts, the increase in expenditures varied across districts with different characteristics. In this section, we discuss patterns in changes to security expenditure trends across districts of different geographic characteristics, enrollment size, racial composition, and socioeconomic composition. The majority of districts in Texas spend less than $200 per pupil, with roughly 1/5 of school districts in Texas spending less than $20 per pupil (Figure 5).

Across districts in different areas of the state, the longitudinal change in security expenditures varies (Figure 6). These regional spending patterns offer insights into how the change in security spending as a priority has changed with respect both to state funding priorities and district-level spending priorities. Security spending in school districts located in cities, for example, rose from roughly $60 per pupil in 2007 to above $80 in 2022, an increase of more than 30%. Alternatively, expenditures rose by significantly more as a percentage of 2007 expenditures in other areas of the state. In rural districts, for example, spending rose from less than $20 per pupil to roughly $50 per pupil, a change of more than 150%.

Security spending appears to have a negative correlation with district size, although the relationship appears to dissipate among Texas' largest districts. This may suggest that there are some economies of scale experienced in how school districts allocate resources for security expenditures, with higher variable and fixed costs for districts with fewer students. Larger school districts are comparatively able to spread security costs across a larger student population. Observing patterns in security spending across district size also highlights where variation in security expenditures lies. For example, the majority of variation in security spending appears to be between the state's smallest school districts. Future research could examine how and why districts of similar enrollments determine security spending allocations and why those allocations differ. Figure 8 offers a visual

representation of the relationship between security spending and district size across regional areas in Texas.

Across school districts of varying racial composition, there appears to be a relationship between the percentage of students within a district who are white and the level of security spending, although there are several high-spending outliers who also serve a high percentage of white students (Figure 9). When visual representations of the relationship between the level of per pupil spending on security and the percentage of students within a school district who are white are compared across regions of Texas, the relationship between the two variables appears to be especially strong in districts located in areas designated as cities and suburban parts of Texas. In these areas, districts serving the highest percentage of white students spend the least per pupil dollars on school security. While the relationship is not as clearly defined in districts located in rural areas and towns, there does appear to be evidence that race is also associated with security spending in these areas as well.

Similarly, there also appears to be a relationship between the level of security spending in a district and the socioeconomic composition of a district (Figure 11). Again, this relationship becomes strong when the variation is decomposed across districts located in different parts of Texas. The strongest relationship between the level of per pupil spending in a district and poverty appears to be in cities, followed by suburban school districts. There does not appear to be a clear relationship in rural school districts, and districts located in areas designated as towns appear to have a small, positive association between security spending and district socioeconomic composition.

Comparisons between the relationship of security spending with the socioeconomic and racial composition of school districts point to a concerning trend in security spending: school districts serving the highest percentage of economically disadvantaged and racially minoritized students spend the most on school security expenditures that harden schools. Across Texas, it is important to note that racial and socioeconomic composition are highly correlated, which is unsurprising given the well-documented history of racialized poverty and segregation in the United States. Given the growing literature pointing to the harms of hardened schools for marginalized and minoritized students and the evidence presented of variation across districts, variation in school safety environments across school districts should draw renewed attention from scholars and other interested parties. That is, while in-school environments may have disparate impacts on students of color and students in poverty, these challenges may be compounded by the environments being created by resource allocation across districts serving the most marginalized and minoritized students.

The findings presented in this section highlight important trends and patterns in school security spending across Texas districts, both statewide and across different types of districts. These results raise critical questions about the factors driving resource allocation decisions and their potential implications for educational equity. In the following section, we discuss these implications in more detail and offer recommendations for policy and practice based on our analysis.

Discussion, Conclusion, and Recommendations

The findings of our study have significant implications for school safety policy, practice, and research. The observed trend of increased security spending demonstrates a continued commitment by school districts to the strategy of hardening schools. Further, our analysis revealed significant variations in security spending patterns across different types of school districts in Texas. Notably,

increases in security expenditures in suburban, town, and rural districts continue to outpace those in urban areas. Moreover, within regions, security expenditures are consistently highest in school districts serving the highest percentage of students of color and students in poverty. This disparity calls for close monitoring by state policymakers to understand how spending on hardening schools is distributed across Texas school districts and how it is spent within districts. State officials and policymakers concerned with racially disparate treatment of students should examine these spending practices carefully, considering whether marginalized students are being disproportionately exposed to policies, programs, practices, and personnel that contribute to school hardening. Future research should focus on identifying the drivers of spending increases and variation in spending.

Additionally, the increasing share of total operating expenditures allocated to security prompts important questions about how district leaders prioritize spending categories. It also highlights how educational organizations are being tasked with responding to external threats of violence while other areas of public policy fail to address issues related to gun violence and violent crime directly. Given the robust and growing literature documenting the harmful effects of hardening schools, the shifting composition of expenditures should raise red flags for both policymakers and district leaders. As schools bear the responsibility of protecting students, it is crucial that increased security measures do not come at the expense of other effective student support services that promote well-being and safety within schools. District and school leaders must remain sensitive to the potential unintended harmful consequences of hardening approaches, especially if one of the unintended consequences of increased security spending is the crowding out of spending on student support services providing mental health services and academic supports.

An important consideration that warrants further investigation is the relationship between the threat of violence to schools and security spending. A GAO report on incidence of gun violence in and around schools finds that schools nearer to large cities, serving a higher percentage of economically disadvantaged and racially minoritized students, experienced more gun related violence overall, particularly dispute-related shootings (Nowicki, 2020). This finding provides important context to our study, because while security spending may be correlated with economic disadvantage and racial composition, the GAO report suggests that these factors may indeed correlate with higher rates of gun violence within and around schools.

However, the GAO report also highlights that different types of shootings occur at different rates across school demographics, which could indicate a need for more nuanced security approaches. This information from the GAO could help inform discussions about whether current security spending patterns align with actual external violence risks, while also underscoring the importance of considering local crime rates and specific types of security threats when allocating resources. Moreover, it is crucial to discuss the relationship of poverty, race, and crime in the context of economic, historical, and sociopolitical factors determining crime. Historians, for example, have shown that criminal laws and systems in the United States have often been designed to criminalize poverty instead of addressing the root cause of poverty (Hinton, 2016; Soss et al., 2011).

We encourage policymakers and stakeholders to carefully consider the impact of financial resource allocation on solving the root problem of child safety and security. Future research should examine cost differences across various security measures and the relationship between student demographic data and security spending patterns. By addressing these critical issues and prioritizing evidence-based, equity-focused approaches to school safety, we can work towards creating educational environments that truly support the well-being and success of all students.

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Appendix A - Tables & Figures

Figure 1

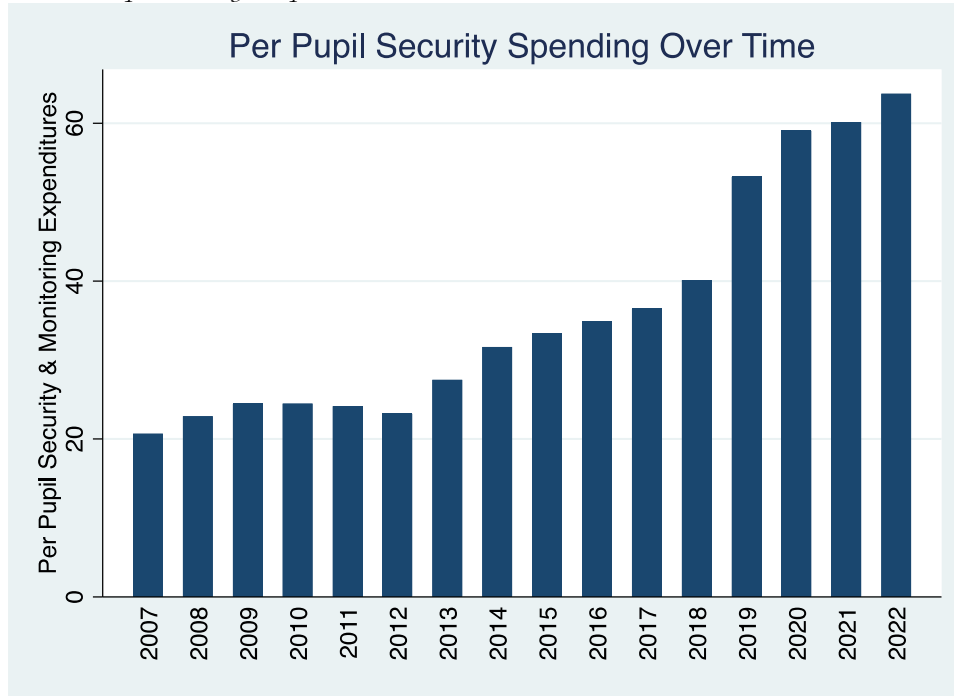*Statewide Rise in Per Pupil Security Expenditures*

Figure 2

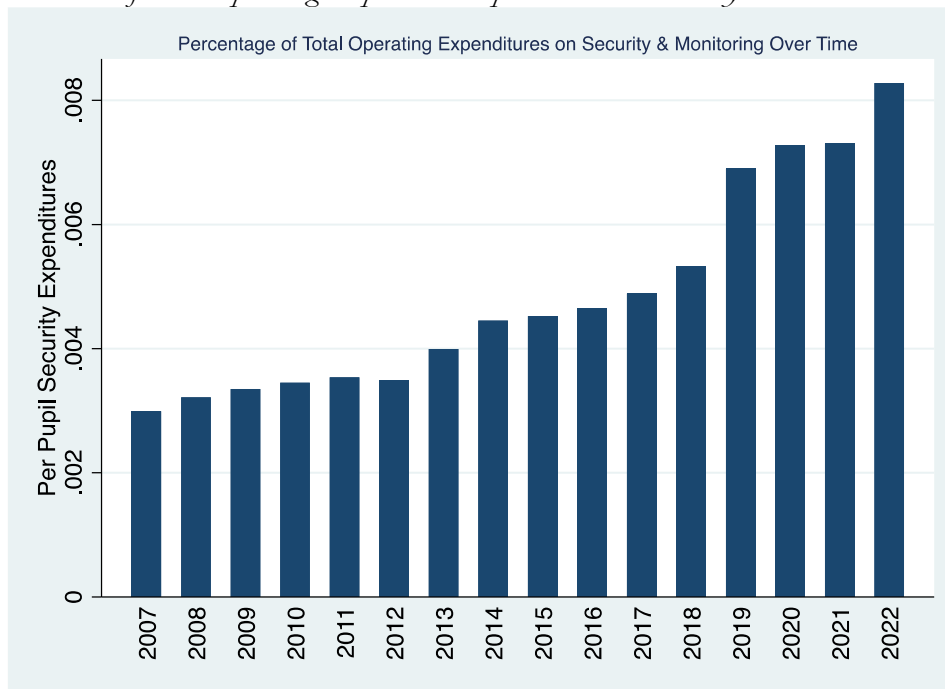*Statewide Rise in Share of Total Operating Expenditures Spent on School Security*

Figure 3

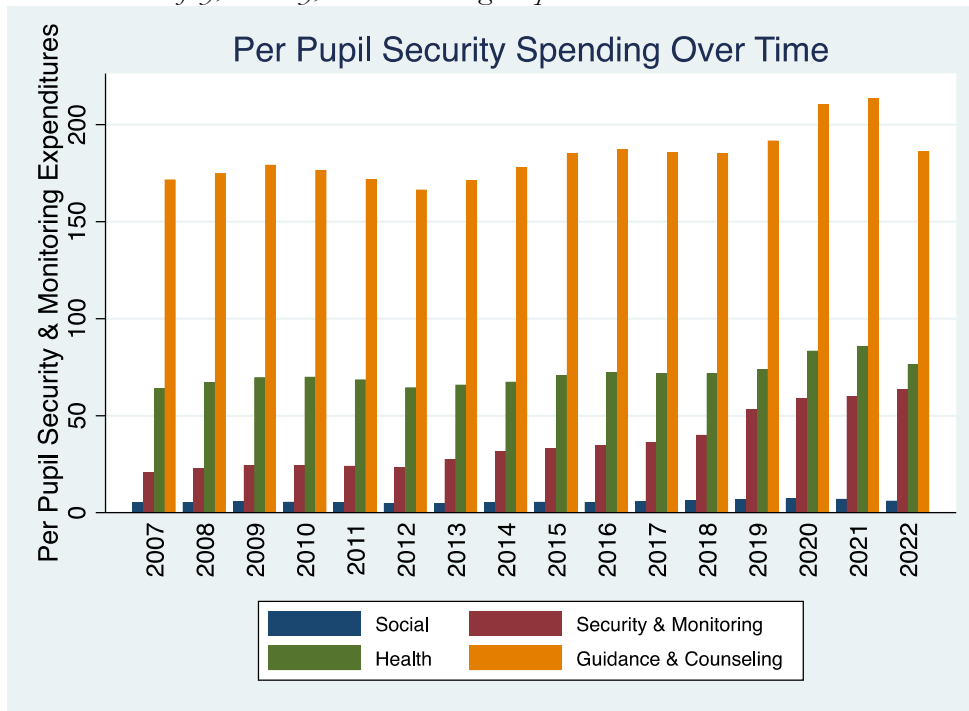*Difference Across Student Safety, Security, and Well-being Expenditures*

Figure 4

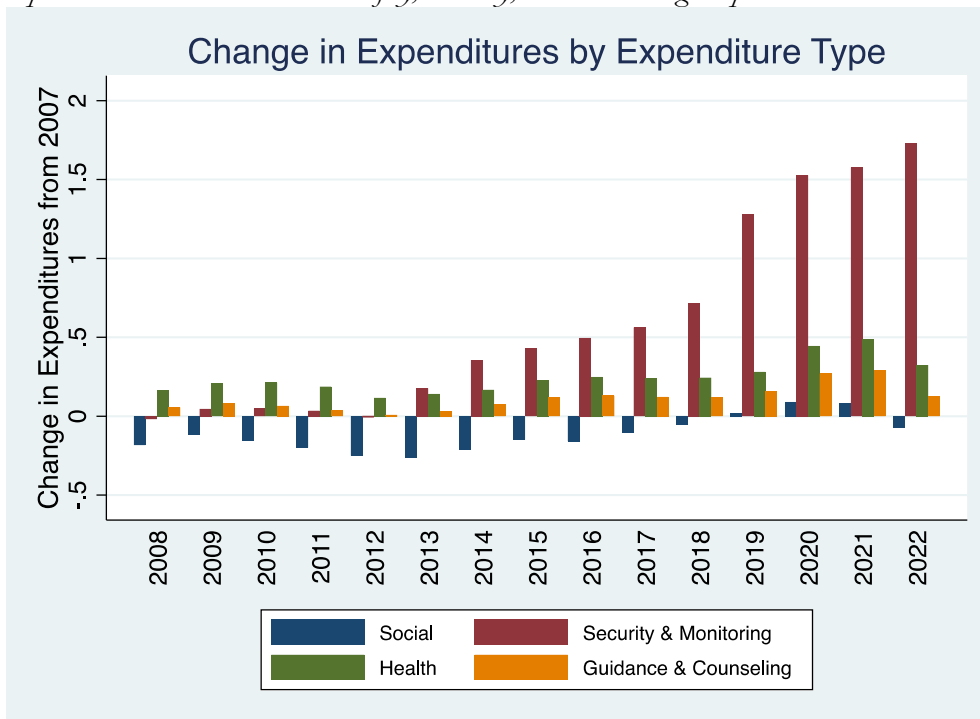*Change in Expenditures Over Time Across Safety, Security, and Well-being Expenditures*
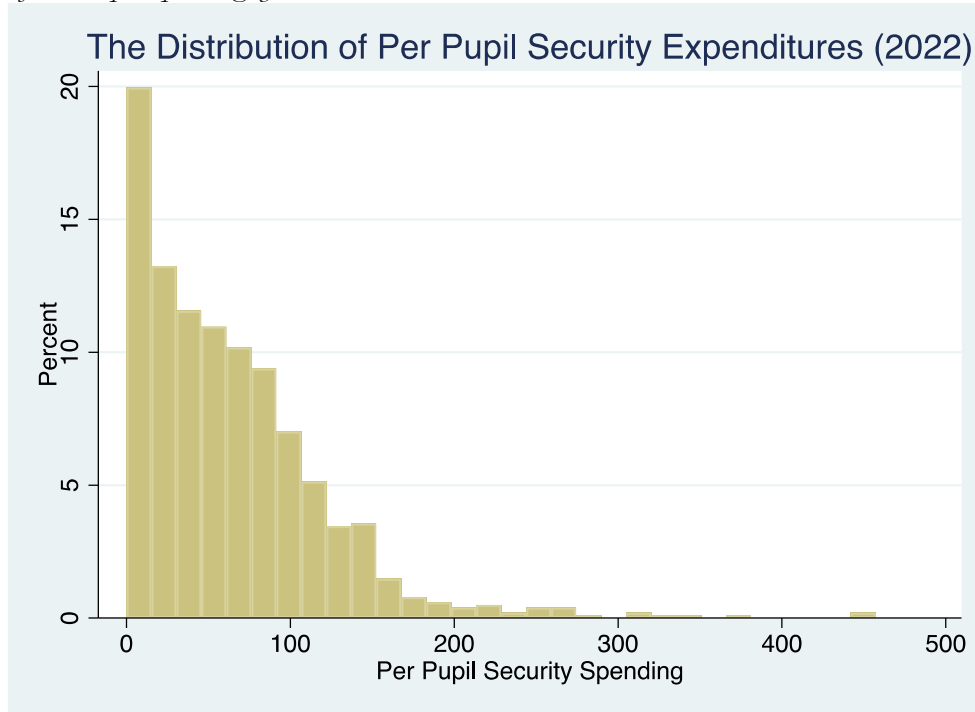
Figure 5

Distribution of Per Pupil Spending by Year

Figure 6

Trends in changes to security expenditures across districts of different geographic characteristics
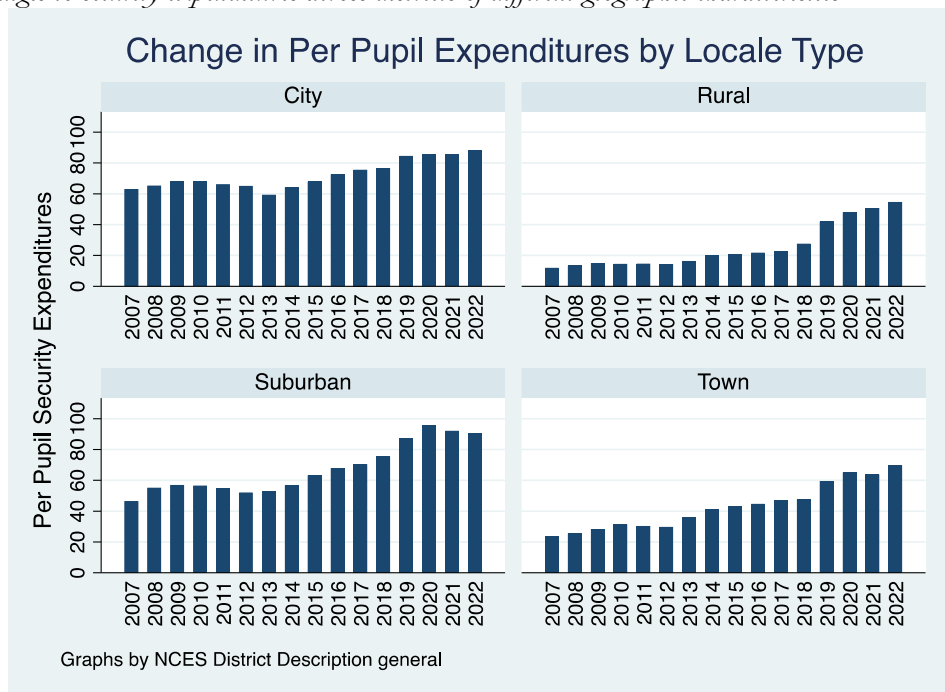
Figure 7

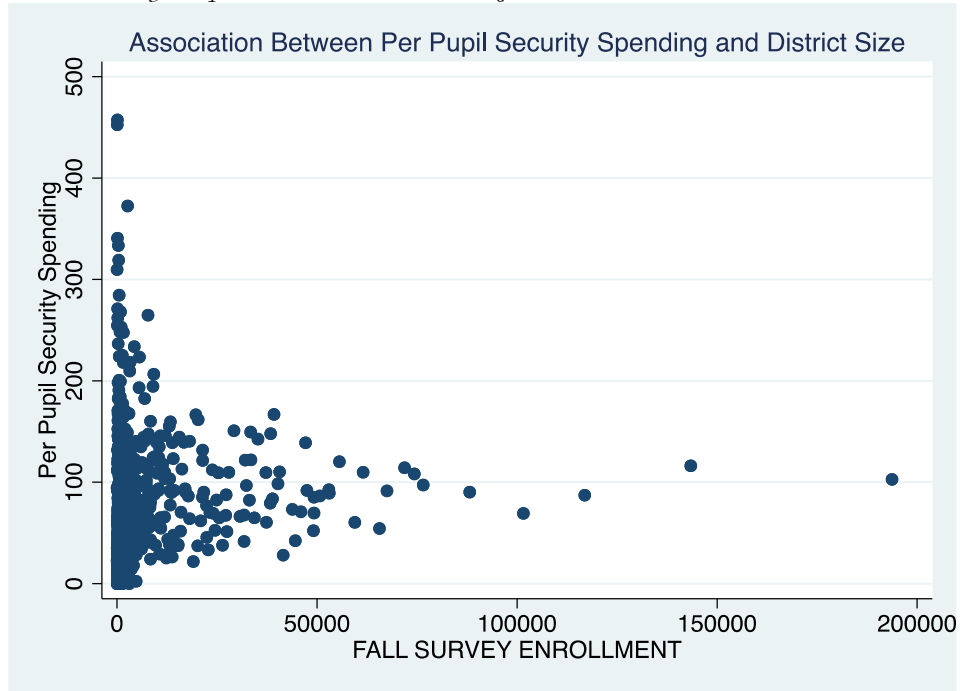*Association Between Security Expenditures and District Size*

Figure 8

Association Between Security Expenditures and District Size by NCES Locale Description
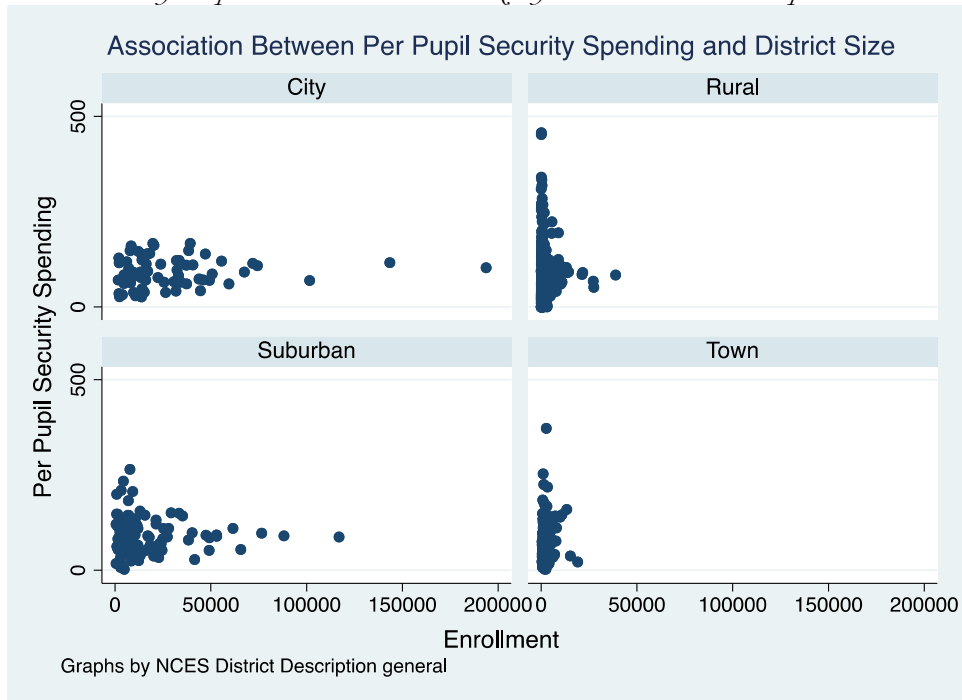
Figure 9

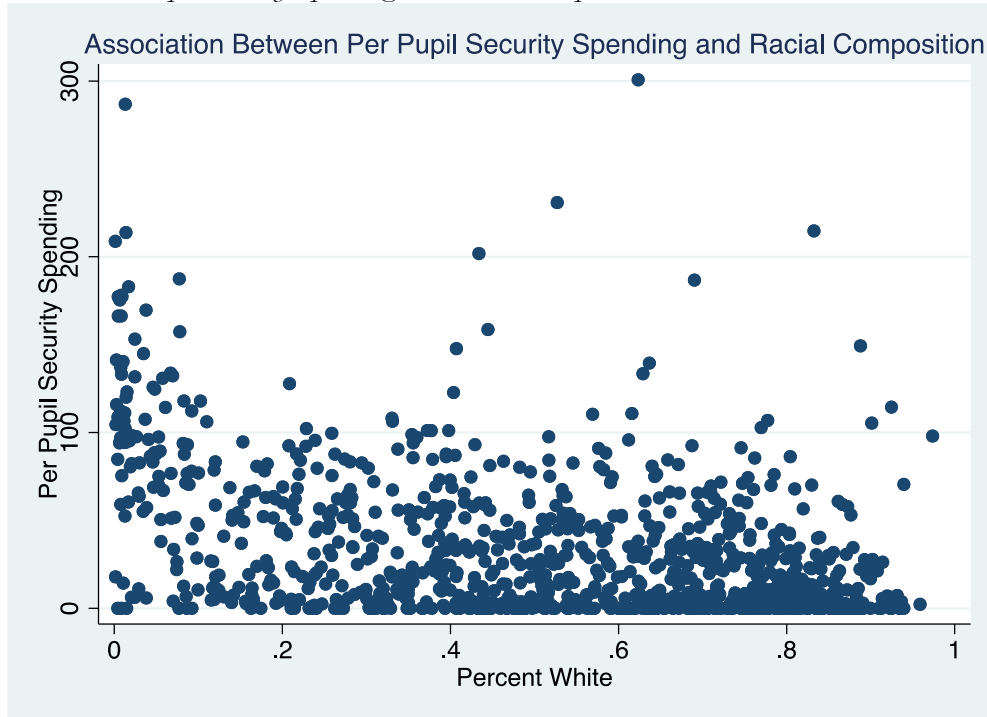*Association between Per Pupil Security Spending and Racial Composition*

Association Between Per Pupil Security Spending and Racial Composition

Figure 10

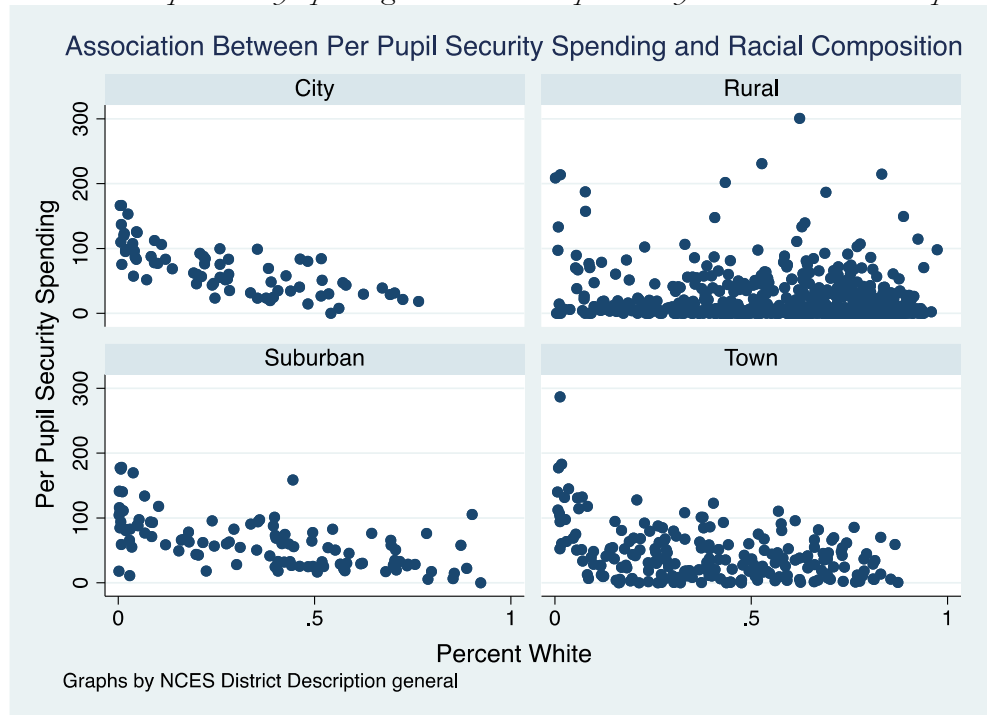*Association between Per Pupil Security Spending and Racial Composition by NCES Locale Description*

Association Between Per Pupil Security Spending and Racial Composition

Figure 11

Association between Per Pupil Security Spending and Socioeconomic Composition
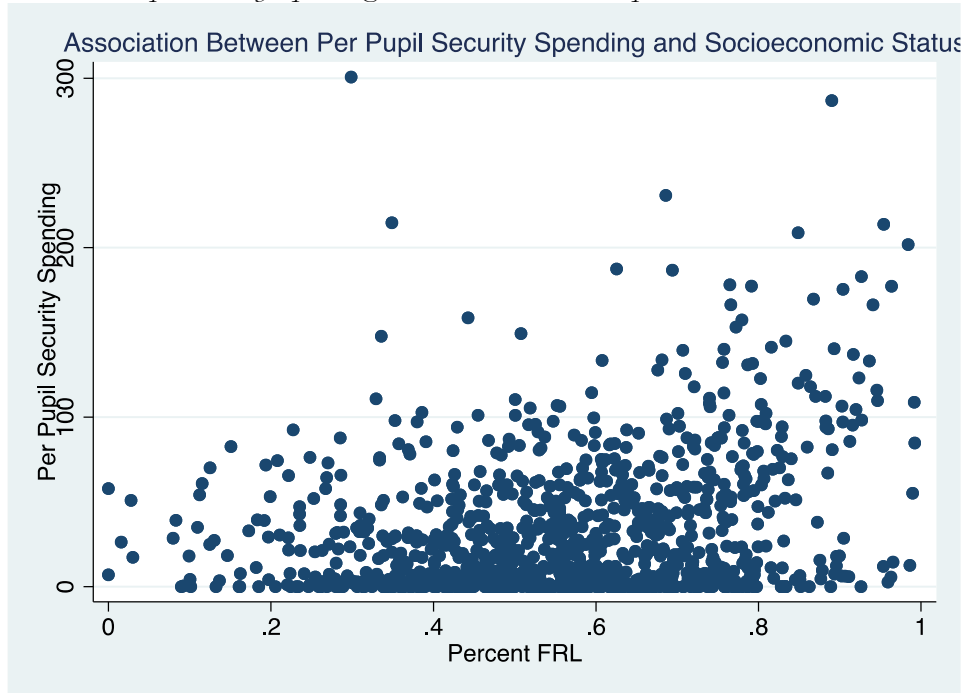

Figure 12

Association between Per Pupil Security Spending and Socioeconomic Composition by NCES Locale Description
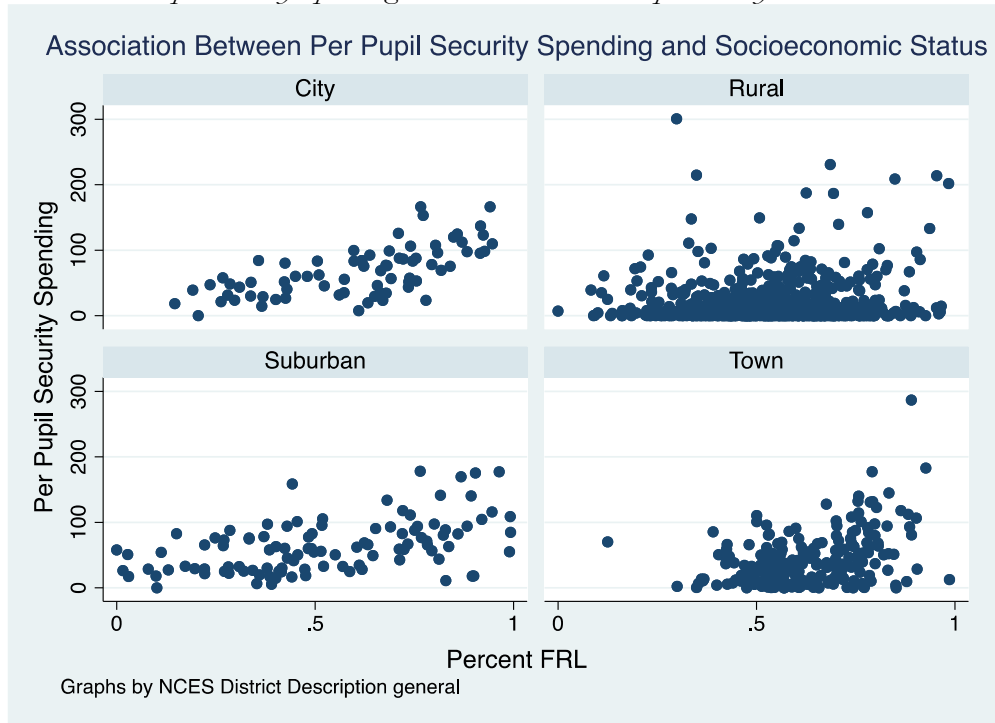
Table 1. Summary Statistics – All Districts and by NCES Locale Description

Variable	Total N	Mean	SD	City N	Mean	SD	Suburban N	Mean	SD	Town N	Mean	SD	Rural N	Mean	SD
Enrollment	19,401	4,212	12,461	3,308	10,713	23,966	1,992	13,011	17,815	3,425	2,451	2,044	10,676	1,122	2,374
Percent White	5,879	48.18%	28.30%	882	19.77%	21.62%	591	34.73%	26.97%	1,055	40.61%	0.2362342	3,351	60.42%	23.80%
Percent Black	5,879	9.24%	15.40%	882	21.48%	24.57%	591	15.87%	19.93%	1,055	8.00%	0.1104668	3,351	5.24%	9.25%
Percent Hispanic/Latinx	5,879	39.04%	27.52%	882	54.16%	29.50%	591	42.80%	28.98%	1,055	48.50%	0.2659376	3,351	31.42%	24.10%
Percent Asian	5,879	1.17%	3.45%	882	2.54%	5.42%	591	3.88%	6.63%	1,055	0.69%	0.0104058	3,351	0.48%	1.65%
Percent ELL	10,499	7.73%	10.20%	1,595	14.57%	16.45%	981	10.92%	11.59%	1,925	7.79%	0.076635	5,998	5.36%	7.05%
Percent Special Education	10,607	10.11%	4.62%	1,604	8.47%	4.50%	983	8.80%	3.75%	1,930	10.27%	0.0324455	6,090	10.70%	5.00%
Percent FRL	10,631	54.78%	21.17%	1,618	64.29%	25.40%	987	46.81%	27.30%	1,930	58.72%	0.1575282	6,096	52.30%	19.13%
Per Pupil Security Spending	19,401	$37.27	$49.88	3,308	$58.10	$68.50	1,992	$59.80	$48.23	3,425	$41.61	$40.52	10,676	$25.22	$41.55

Restoring the Land:
Pro-Blackness as a Healing Force Against Anti-Black Classroom Management

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Abstract

This paper critically examines the systemic harm inflicted on Black students through anti-Black classroom management and disciplinary practices, positioning Pro-Blackness as a transformative framework for healing and justice. Grounded in healing justice and African Diaspora Literacy, the discussion highlights the pervasive impact of the "white gaze" in perpetuating inequities and the urgent need for educators to reject Eurocentric standards. The authors argue for a shift from punitive to Pro-Black classroom management practices that affirm Black cultural dimensions and foster holistic growth. Integrating strategies for self-reflection, relational accountability, and the inclusion of Black-centered pedagogy provides a roadmap for educators committed to creating equitable, affirming spaces for Black students. The paper ultimately challenges educators to engage in collective action to "heal the land" by honoring the humanity and potential of Black children.

Keywords: Pro-Blackness, healing justice, classroom management, Black students, equity

In his speech at the 2024 Democratic National Convention, Senator Raphael Warnock solemnly shared, *"And the question is, who will heal the land?"* He spoke in the context of a divided America, but as I listened, as always, I thought about it concerning Black children in schools in America. I pondered *who will heal the land for Black students* being punished for being Black in school spaces. How is the land damaged, one might ask? First, establishing the context of "the land," the reference comes from a Bible verse that refers to God healing the promised land riddled with misfortune due to their sin. In contrast, we argue the healing of the land in an educational context refers to removing barriers and systematic school discipline policies and practices that interfere with Black students' ability to enjoy their promised land, an equitable education.

While we discuss various aspects of education, our focus is specifically on how classroom management practices have harmed Black children, the resulting disciplinary consequences, and what we propose as an antidote to these issues. Black children have been victims of anti-black violence in schools for decades. To be abundantly clear, while we will have some discussion about Black children's historic victimization through school discipline, this is by no means a new phenomenon, albeit seemingly no substantial progress has been made. Ladson-Billings & Tate (1995) assert that schools are a space where whiteness asserts "the absolute right to exclude" (p. 60). This exclusion is evident through the systemic and strategic policies and practices like separate but equal and now private school vouchers. This absolute right to exclude also continues to protect the white-centered curricula and forces the exclusion of Black[1] histories in their purest form. We emphasize the *purest forms* to acknowledge how Black histories, knowledges, culture, and being have been omitted, distorted, and romanticized; thus, students received ill-informed information (Boutte, 2016/2022; Jackson et al., 2021). As a result, we seek a *healing of the land* for Black folx.

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[1] While we recognize that other minoritized groups experience similar issues, this paper deliberately focuses on Blackness and its specific challenges.

In our quest for healing, we emphasize bell hooks' (2000) notion that healing cannot occur in isolation. While there is a need for some individualized healing, there is an abundant need for collective healing for Black communities as Black folx are communal (McNeil-Young et al., 2023). For Black folx to heal, the first step is to escape the white gaze (Ilmi, 2011) and reject the eurocentric standards that are established as the goal. hooks (2015) contends that the white gaze (as she calls the voice of judgment) is a tool by which dominant cultures maintain control. As a result, Black folx never feel that they have done enough; it is akin to the popular statement *you have to work twice as hard to get half as far*. We resist these notions and seek healing.

Drawing on humanitarians such as Howard Thurman, Martin Luther King, Jr., and Malcolm X, Ginwright (2015) positions *healing justice* as seeking "(a) collective healing and well-being, and also (b) transforming the institutions and relationships that are causing the harm in the first place" (p. 38). We use this as the framework for which we have based the healing journey of this paper. Throughout, we focus heavily on *transformation*. Transformation of systemic policing while also transforming our communities. Guided by *healing,* we begin this paper by examining what we seek refuge or healing from. From there, we explore the self-work educators must do to prepare for a healthy classroom community. We leave readers with a few classroom application examples.

Toward Healing: From Anti-blackness to Pro-Blackness

We start by addressing the well-articulated literature concerning Black students and school discipline. School discipline encompasses a structured set of actions, policies, rules, and procedures aimed at regulating student behavior to ensure adherence to societal norms (Williams, 2024). Scholars over time have situated schools as sites of lynching (Woodson, 1933), sites of spirit-murdering (Love, 2014), exclusionary spaces (Greene, 2012), carceral (Williams, 2024), and sites of black suffering (Dumas, 2014), among others. Black children historically have suffered from unfair treatment, adultification, and misinterpreted cultural expressions. We consider all of these actions as forms of anti-black racism and anti-black violence interchangeably. We draw on Dumas and ross (2016) conception of anti-blackness as the idea and lived reality where Black people endure social harm and must constantly push back against it. It differs from racism as it's a deep-rooted belief system that views *Blackness* as something negative, not fully acknowledging Black people as individuals and positioning them as the opposite of everything considered pure, humane, and White (Comrie et al., 2022; Dumas and ross, 2016). Dumas (2016) went as far as to ensure the use of a lowercase 'b' for Black in anti-blackness, as it refers to the social construction of blackness and not the vibrance of the living experiences of Black people.

Anti-black violence in schools is the lens through which we analyze students' experiences and as a reference when deciphering shared data. Johnson et al. (2019) describe anti-black violence through five categories: (1) physical; (2) symbolic; (3) linguistic; (4) curricula and pedagogical; and (5) systemic school violence. For context, Table 1 describes each type and contains real-life examples as depicted in news media.

Table 1

Examples of Anti-black Racism in Schools

Type of violence	Definition	Example
Physical	The use of force and physical harm driven by racist attitudes and biased beliefs.	*GA elementary school staff member accused of striking only black students for not charging laptops.* (https://www.fox5atlanta.com/news/georgia-elementary-school-staff-member-accused-of-striking-students)
Symbolic	A figurative representation of the abuse, pain, and suffering inflicted on the spirit and dignity of Black people due to racial discrimination.	*A Black student was suspended for his hairstyle. The school says it wasn't discrimination* (https://apnews.com/article/hairstyles-dreadlocks-racial-discrimination-crown-act-034a59b9f2652881470dc606b39e5243)
Linguistic	The restriction and regulation of Black voices and how they express themselves. This often involves the marginalization of Black language or African American Vernacular English while promoting mainstream white English.	*Teachers banned slang after hearing too much 'rizz': A helpful lesson or 'anti-academic'?* (https://www.usatoday.com/story/news/education/2024/08/23/teacher-bans-slang-in-classroom/74901822007/)
Curricular and Pedagogical	The harm caused by school curricula that prioritize European perspectives and spread false narratives about Black people, reinforcing negative stereotypes and marginalizing Black knowledge.	*A course meant to inspire more Black students to take AP classes sparked a culture war instead* (https://www.nbcnews.com/news/nbcblk/fight-ap-african-american-studies-black-students-are-left-rcna74175)
Systemic School	This harm is deeply rooted in the systems, practices, language, traditions, rules, and laws of schools, often reflecting racist and dominant ideologies.	*Judge narrows Black students' race bias case against Georgia school district* (https://www.ajc.com/news/atlanta-news/judge-narrows-black-students-race-bias-case-against-georgia-school-district/DRP73DH7YJCU3OJ4JE3FJGCEVE/)

These examples of anti-black violence just begin to tell the story of the experiences of Black children in schools. As a result of this violence and other school discipline practices, Black students have been subjected to discipline at far higher rates than their peers. To illustrate this discrepancy, we look at Georgia's public school enrollment data since we (authors) are Georgia teacher educators

and are most intimately familiar with this data. We recognize that this issue is a large scale issue across the United States and ask readers to explore the data of their communities.

According to the Georgia Governor's Office of Student Achievement's K-12 Student Discipline Dashboard, Black students comprised 37.5% of the overall population in 2023 but accounted for 54.3% of those disciplined. In contrast, white students comprised 34.7% of the overall population yet represented only 25.4% of those disciplined. These figures underscore a troubling racial disparity in school discipline, where Black students are disciplined at disproportionately higher rates than their White counterparts, even when their populations are similar. Data like this raises questions about the reasons behind the discrepancy and its potential consequences.

Research consistently suggests that implicit bias, systemic racism, and punitive disciplinary policies disproportionately target Black students. For example, Okonofua and Eberhardt (2015) found that teachers often perceive Black students as more disruptive than White students for the same behaviors, leading to harsher punishments. These biases are reinforced by zero-tolerance policies that fail to consider the context of student behavior, particularly when it involves Black students.

School discipline practices tend to exclude students from direct instruction with little to no rehabilitation back into the school communities. Toro & Wang (2021) report school discipline creates a sense of alienation and unfavorable school climate for black students. These punitive measures not only alienate students but also remove them from valuable instructional time, exacerbating the academic disparities that already exist.
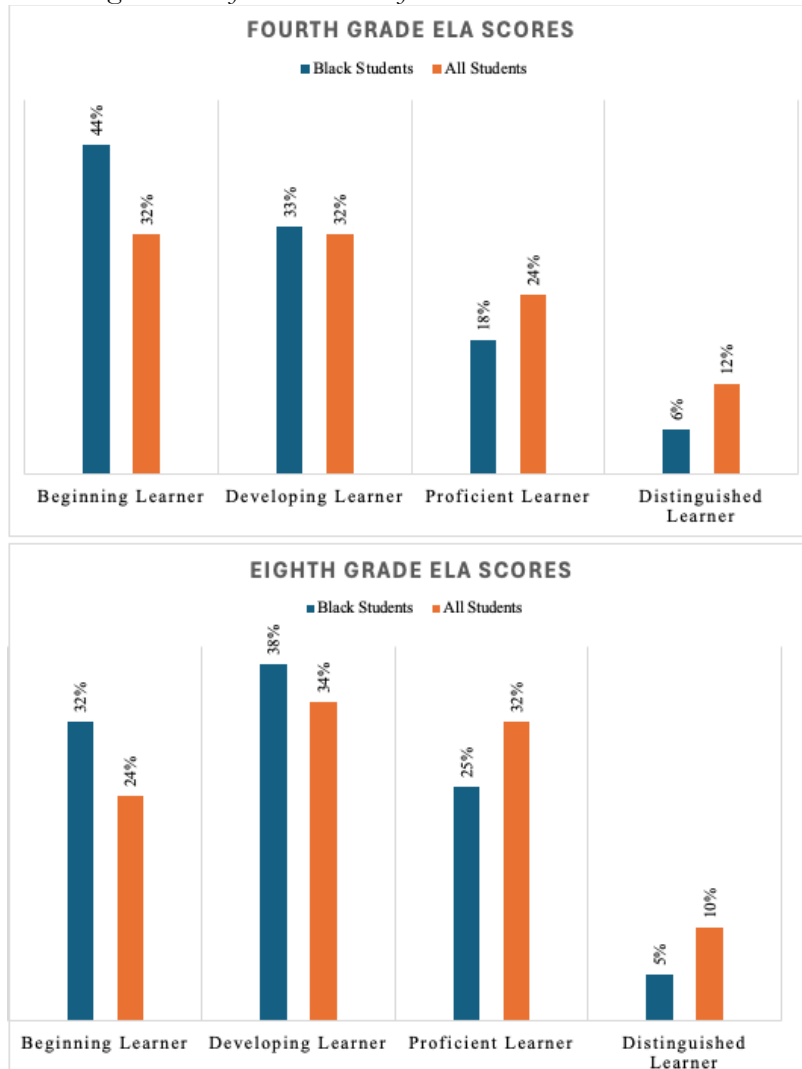
When considering consequences that interfere with learning, it is alarming that Black students in Georgia are the majority in the top three categories that typically come to mind: in-school suspension (50.5%), out-of-school suspension (62.2%), and expulsions (59.5%). These consequences remove students from active teaching and learning, preventing students from being actively engaged in learning. This not only disrupts learning but also leads to what has been referred to as the "school-to-prison pipeline," a phenomenon in which Black students, who are disproportionately disciplined, are funneled into the criminal justice system at higher rates (Milner et al., 2018).

The overrepresentation of Black students alienated from classrooms, coincide with poor performance on standardized tests and other academic performance indicators. Research has found that Black students who are frequently disciplined have lower academic achievement scores and are less likely to graduate on time (Arcia, 2006). To illustrate this, we compare school discipline data to end of year testing for two midpoint grades, fourth and eighth. Figure 1 illustrates how Black students' academic success has been hindered by overdisciplining with subsequent classroom exclusion.

Gregory et al. (2010) reaffirms, school disciplines, interferes with Black students' academic achievement, making a direct connection to racial disparities in school discipline to the commonly referred to "achievement gap." We recognize that discipline is not the sole factor, but we emphasize its impact in this article. The frequent removal of Black students from learning environments compounds other challenges they face, such as limited access to high-quality educational resources, lower expectations from teachers, and economic disparities (Milner et al., 2018).

Figure 1

2023 English End of Course Scores for GA 4th and 8th Grades

FOURTH GRADE ELA SCORES

■ Black Students ■ All Students

Category	Black Students	All Students
Beginning Learner	44%	32%
Developing Learner	33%	32%
Proficient Learner	18%	24%
Distinguished Learner	6%	12%

EIGHTH GRADE ELA SCORES

■ Black Students ■ All Students

Category	Black Students	All Students
Beginning Learner	32%	24%
Developing Learner	38%	34%
Proficient Learner	25%	32%
Distinguished Learner	5%	10%

Before continuing, we challenge readers to pause and research their state's discipline data to understand this ongoing phenomenon personally. The alarms have been sounding; this is evidence of a land in need of healing; the question is, what will we do? *How do we address and work toward liberation for Black students in educational spaces?*

Anti-Black Classroom Management

Having established a clear understanding of anti-black violence, we want to discuss how these acts of violence show up in classrooms as anti-black classroom management. The National Council on Teacher Quality reports many teacher education programs fail to adequately prepare teacher candidates with evidence-based classroom management strategies (Greenberg et al., 2014). Their report indicates, classroom management is often not given directly, rather, it is woven throughout other aspects of the curriculum. This leaves students to rely on what they observe in practicum

experiences and to lean on their personal perspective, which many teacher preparation programs ask students to reflect on.

Traditionally, teachers have set classroom rules, norms, and expectations before students come on the first day of school. These are set with the teacher in mind, often following their idiosyncrasies, ignoring the needs of the students sharing the space. Thus, teachers find themselves in power struggles with students. Lisa Delpit (1995) describes the *culture of power,* dissecting the many aspects of power in classrooms, bringing light to the idea that "those with power are frequently least aware of- or least willing to acknowledge its existence. Those with less power are often more aware of its existence" (p. 24). She explains how teachers (often white women) are unwilling to engage in conversations that threaten their power and fail to *listen* to the suggestions for the appropriate use of that power. As a result, Black students often do not receive the environment or instruction that is conducive to their learning. Moreover, they are frequently punished for being Black. This failure to critically reflect on their use of power leads to an educational environment that is not conducive to the learning of Black students, who often experience discipline disproportionately. As Sinha (2023) elaborates, the power dynamics in the classroom are reflective of broader societal norms that privilege certain ways of speaking, behaving, and interacting, often marginalizing students of color. This disconnect between student experiences and teacher-imposed norms contributes to Black students being punished for cultural expressions that do not align with dominant classroom expectations.

Understanding *punished for being Black* requires understanding Black culture and the ways of being. Without cultural understanding, teachers misinterpret actions and interactions with Black students, often defaulting to disciplinary action. Reflecting on our time in classrooms in various roles, we offer this anecdote as a hypothetical situation to consider.

> In a classroom, Mr. Anderson notices that Malik, a Black student, has been whispering with a friend while he is giving instructions. Frustrated, Mr. Anderson calls Malik out in front of the class, saying, "Malik, do you have something more important to share with everyone?" Malik's body language changes immediately. He crosses his arms, leans back in his chair, and responds sharply, "Why you always coming at me?"
>
> From Mr. Anderson's perspective, Malik's response seems disrespectful and defiant. However, Malik's reaction is shaped by his cultural experiences. In his community, respect is earned and mutual—if he feels disrespected by how he's called out, he's more likely to respond defensively. To Malik, being singled out in front of his peers feels like an attack on his character, and he doesn't want to appear weak. So, instead of backing down, he pushes back.
>
> Without considering Malik's cultural background, Mr. Anderson may interpret the behavior as insubordination, missing the deeper issue—that Malik is reacting to what he perceives as a disrespectful public call-out, and is trying to protect his dignity in front of his peers.

Some interpretations of this interaction include considering this situation as a means of not holding students accountable. We want to be abundantly clear we by no means expect students not to be held accountable. Still, we ask readers to consider the ways by which they handle situations, honoring students' humanity at the forefront of every situation. As readers continue this journey, reflect on how they can engage with students without dehumanizing them.

Anti-black violence in classrooms shows up often through other classroom management strategies that ignore individualism in students. While potentially beneficial, packaged programming does not account for accommodations for students struggling to maintain the expected behavior. Think about the neurodivergent student (diagnosed or not) who has trouble sitting down or staying still. This also could be exhibited in a desire to be in their own shell and not interact with anyone, including the teacher. That student is immediately disadvantaged simply because their brain is wired differently. Students with behavior disorders like EBD, LD, and ADHD are highly likely to be excluded or deemed to be defiant by teachers (Krezmien & Leone, 2006).

In contrast, a student who is neurotypical and thrives from sitting in one spot is considered a star behavioral student. Using cookie-cutter strategies, the neurotypical child is praised, while the neurodivergent student is categorized as a behavioral issue. The question is, *how can we engage all students in a way that meets their needs?*

We all have stories that we can share of moments when our classroom management systems were anti-black. As Black scholars ourselves, we have been guilty of this as well, acknowledging the crucial notion that Black folks too can be anti-black and engage in intentional and unintentional anti-black behaviors. Rather than stagnating in these ideas, we transition to investigate the transformation to Pro-Black classroom management.

Pro-Blackness in K-12 Classrooms

Pro-Blackness steps back and marvels at the beautifully brilliant existence of Blackness. It embodies pride, like James Brown's anthem, "Say it LOUD, I'm Black and I'm Proud." It fuels the hopes of the youth through Nas's rap, "I know I can be what I wanna be." It flows through the poetic pen of Langston Hughes, who boldly declared, "I, TOO, am American." It radiates love like the warmth felt at a family reunion or Big Mama's house on a Sunday afternoon. It's smooth, like a Soul Train line, and fierce, like Beyoncé or Saucy Santana commanding the stage.

Pro-Blackness is an unwavering and unapologetic love for all things Black, from our African origins to the rich expressions of contemporary diasporic living. The communal nature of Pro-Blackness honors individual expression while ensuring the well-being of all, especially the children. Pro-Blackness is relational and shows love and support even when it has to be *tough love.* For a formal definition, we refer to Pro-Blackness as "an unapologetic, positive, proactive perspective regarding Blackness and Black people" (Boutte et al., 2024, p. 24).

In the classroom, Pro-Blackness is just the same; it is a commitment to the well-being of children through the use of Black centered community building, content, and pedagogies. Boutte et al. (2024) share African Diaspora Literacy as a mechanism to create a pro-Black classroom. African Diaspora Literacy (ADL) seeks to build literacy about Black people throughout the diaspora and their worldviews and epistemologies (Boutte et al., 2017). African Diaspora Literacy is conceptualized on the foundation of key African, Afrocentric, and Black scholars such as Asa Hilliard, Molefi Kete Asante, Joyce King, Gloria Boutte, and LaGarrett King (see Boutte et al., 2024). A key aspect of ADL is learning should be about and *from* African diasporic people. The emphasis on *from* is significant as we should tell our stories, as when others do, it becomes a distorted view that omits essential aspects and often hides our existence (Boutte et al., 2024; Jackson et al., 2021). This is evident in the curricula schools use that romanticize Black histories, and when fearful, they (white

folks, often politicians) omit them under the guise of *divisive concepts*. Pro-Blackness (re)directs us to seek out what is *right* about Blackness against the backdrop of anti-black violence in schools.

African Diaspora Literacy contains four harmonious components: Black historical consciousness themes (King, 2020); African values and principles (Jackson et al., 2021; King & Swartz, 2016); Black cultural dimensions (Boutte, 2016; 2022; Boykin, 1994); and Historical and contemporary perspectives (Boutte, 2016; 2022). These components are in no particular order but essential (Boutte et al., 2024). Considering these components in the classroom management context, we bring attention to the Black cultural dimensions: *spirituality, harmony, movement, verve, affect, communalism, expressive individualism, oral tradition, social time perspective, perseverance, and improvisation* (Boutte, 2022). These dimensions reflect Black cultural ways of being as expressed and observed worldwide. We bring attention to these because these ways of being, engraved in Black DNA, are how Black students show up to schools every day. Table 2 shares how these ideals show up in classrooms daily.

Table 2

Black Cultural Dimensions

Dimension	Definition	Classroom Example
Spirituality	A view of life that focuses on energy and vitality, believing that unseen forces affect human experiences.	Encouraging students to practice meditation or other spiritual practices throughout the day when they see fit.
Harmony	The idea that everything in life is connected, and people should live in balance with nature and others.	Including lessons that teach respect for the environment and fostering connections between people and nature.
Movement	Physical activity, rhythm, and dance are seen as crucial for mental and emotional well-being.	Incorporating activities like dancing or rhythmic exercises to energize students during lessons.
Verve	The ability to bring energy, enthusiasm, and liveliness into one's actions.	Using dynamic and hands-on activities to keep students actively engaged and energized in their learning.
Affect	Focusing on emotions and being aware of feelings, emphasizing expressing them openly.	Having classroom discussions where students can openly share their emotions and experiences promoting emotional literacy.
Communalism / Collectivity	Building a sense of community where individuals recognize their responsibilities to others and work together for the collective good.	Creating group projects that emphasize teamwork, shared responsibility, and collaboration among students.
Expressive Individualism	Encouraging people to develop their own unique identity and express themselves authentically and creatively.	Assignments that allow students to showcase their individuality, such as personal narratives or creative presentations.

Table 2

Black Cultural Dimensions

Oral Tradition	Emphasizing the importance of speaking and listening as forms of communication, often using vivid and creative language.	Encouraging storytelling and oral presentations where students use expressive language and performance skills.
Social Time Perspective	Viewing time as something that is shaped by social interactions and personal experiences making it flexible and unique to each person.	Being flexible with deadlines and understanding that students might approach time differently based on cultural contexts.
Perseverance	The determination to keep going, even when things get tough, and to bounce back from challenges.	Praising students for their hard work and resilience, particularly when they overcome obstacles or setbacks in learning.
Improvisation	Adapting to situations by creating new, culturally relevant solutions, helping individuals reclaim their cultural identity.	Allowing students to adapt or improvise during work, encouraging creative problem-solving and cultural expression.

With these ideals in mind, we continue to explore what pro-Black classroom management looks like in classrooms, starting with the characteristics of the teacher.

Checking Our Heart, Mind, and Actions: Characteristics of a Pro-Black Classroom Community Educator

"I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel." -Maya Angelou

 As educators, we have a big responsibility in the healing of the land. While we are usually not involved in policy development, there are things in our control that we can change. We want readers to start with within. In the healing process, there are some pains in the realization of the impact of unintentional actions, some of which come from personal experiences or upbringing. I, Jarvais, had this realization in my first year of teaching. I was born and raised in the South, with very traditional and religious parents and family. Thus, there was a strict hierarchy between children and adults requiring things such as mandatory use of *yes ma'am/sir* and *no ma'am/sir*. I took that same idea into my classroom. I remember wanting to take on the persona of Mr. Clark from *Lean on Me*. With that mindset, I ended up having many power struggles with students. One student was adamant about not saying yes/no, sir. As the big bad teacher and self-proclaimed King of the castle (the classroom), I pulled the student into the hallway and called his mother. The discussion I had with his mother was the ah-ha moment that I needed. She informed me that given their ways of being, as native northerners, she did not require him to say those pleasantries at home. Then, I realized I was fixated on the wrong issues. Respect could be established in many different ways, and my fixation on such a minute issue interfered with not just that student but all students. At that point in my career, I began asking myself, *does this [insert behavior or expectation] impact students' learning, or is it just my stubbornness?* We don't always get it right. As such, that situation, and similar ones, led and continues to lead me to critically reflect on:

- How has this power struggle interacted with me in my past students?
- How many students did I isolate or alienate because I wanted power more than I wanted them to learn?
- Whom did I hurt so much that I caused a wound that they are still walking around with?

My parents, like many readers, would probably not agree with this concept, but I share to emphasize that there are so many ways of being as people. In this case, I, a Black male teacher, and the student, a Black male, while sharing the identity as Black males, have different experiences and understandings of the world. Blackness is not monolithic and requires continuous engagement as culture is dynamic.

Frequently, there is a focus on what the student is doing wrong, while educators rarely reflect on practices and policies that are detrimental to students. Furthermore, we often fail to acknowledge the humanity of children, as evident in the anti-Black violence that occurs. We recognize that such statements may be resisted, as educators may feel defensive; this is a natural reaction. We intend to encourage educators to consider some customary practices we engage in that unknowingly dehumanize students. Here are a few examples of how we impose unrealistic and, in some cases, dehumanizing expectations on children in schools:

- No talking during instruction, while working, in the hallways, and during lunch.
- No eating outside of lunchtime.
- Obey without questioning.
- Limited allowances for restroom breaks.

We must first remember that students, like all children, are still developing and have various needs—movement, socialization, and exploration. These are expectations that even teachers cannot fully meet within the constraints of a school day. For example, at any faculty meeting, we observe these same behaviors: colleagues engage in side conversations, work on tasks unrelated to the meeting, and snack to stave off hunger. This is simply human nature. We thrive on interaction, focus on what we find relevant, and resist mindlessly following instructions without understanding the "why." Children, whose bodies burn off food almost as quickly as they eat it, may experience real hunger during the day. While some rules exist to maintain order, some are merely in place for control.

As a Pro-Black educator, it's essential to critically evaluate these rules and policies to create a humane environment for our students. This sometimes means closing the door and doing what is best for the students we serve.

Just as students show up differently in classrooms, so do educators. There is no one way to be a Pro-Black teacher. However, we can share two profiles as examples: warm demanders and joyful warriors. Regardless of their style, Pro-Black educators exhibit certain characteristics: they are culturally relevant in all aspects of teaching, maintain high expectations for their students (Boutte, 2016/2022; Ladson-Billings, 1994), honor Blackness in their classrooms, and are unafraid to challenge the status quo. Rather than attempting to control students, they create an environment that fosters teaching, learning, and holistic growth (Boutte et al., 2024).

At the heart of Pro-Black teaching are relationships. While these relationships may look different from one classroom to the next, they are essential for success with students and their families. As

Rita Pierson (2013) reminds us, "Kids don't learn from people they don't like." While some teachers may feel that a child's approval isn't their concern, gaining that connection could be the key to eliminating behavioral issues, reducing power struggles, and fostering academic success.

Warm Demander

In the ongoing battle against anti-Black educational policies, educators are called to be more than just teachers—they must be relational practitioners for Black students, restoring, rehabilitating, and mending previous experiences and pedagogies used in classrooms. Educators must embody "tough love" as your favorite neighborhood Auntie or Grandma would do when you were out of line. It is an exceptional 2-step dance, gliding on the line of accountability and love. This "dance" is the "Warm Demander." The warm demander concept offers a powerful model for combining high expectations with deep, culturally informed care. As described by Lisa Delpit, these educators recognize that "nothing makes more of a difference in a child's school experience than a teacher" (Delpit, 2012). Warm Demanders view their students as "diamonds in the rough," capable of brilliance when given the push and support they need. (Delpit, 2012). Moreover, Ladson-Billings (1995) describes the need for teachers to build strong, trusting relationships with students that make room for establishing and enforcing high academic expectations. These educators also understand that Black students are capable of success and deserving of a learning environment that recognizes and nurtures their brilliance. These educators do more than teach; they advocate, support, and celebrate their students' cultural identities, pushing them to excel while ensuring they feel seen and valued.

Reflecting on my (Ashley) time as an instructional coach, I distinctly recall Mrs. Sims, a 4th grade ELA teacher who was engaging but, more importantly, had exceptional relationships with her students. Mrs. Sims had mastered the art of the warm demander dance. Her classroom was choreographed with high expectations and the belief that no student had the option to fail. I can still hear her call and response chant to students, "I Can, I can…I know I can," reassuring students that they can achieve their writing goals for the day. Through implementing her daily affirming class motto, collaborative class community, and no-nonsense loving approach, Mrs. Sims cultivated an environment where her students knew without a doubt that they were to be successful in her class. Truth be told, their success and achievement were a requirement. This is what a warm demander profile calls educators to. We unlock their greatness through a balance of love and the right amount of firm stretching of students in their abilities. Enacting the warm demander in educators can not simply be diminished to avoiding harm, but instead actively creating a space where Black students can flourish, turning classrooms into a refuge where learning and growth can freely occur, regardless of cultural context.

To truly embody the essence of a warm demander, a teacher must master the delicate art of combining steadfast high expectations with heartfelt care. It's about building trust with students while holding them accountable for their growth, ensuring they feel both challenged and supported. This approach blends firm, clear communication with empathy, all while deeply respecting and incorporating students' cultural backgrounds. In doing so, teachers create a space where students not only strive to meet academic and behavioral goals but also feel valued and understood as individuals. By honoring their cultural identities, teachers inspire students to rise to their full potential with confidence.

The challenge is clear, but educators can be a part of the healing! By embracing the role of a Warm Demander—one who refuses to let systemic barriers and preconceived notions define students' futures—teachers commit to doing the work and upholding pro-Blackness in the classroom. Additionally, by embracing the Warm Demander philosophy, Teachers can transform their classroom into a place where Black students are not just merely surviving in a barren land but thriving in a land of milk and honey, where they are challenged, supported, and empowered to reach their full potential making our schools a promised land of equity and excellence for every child.

Joyful Warriors

Second Gentleman Doug Emhoff described his wife, Vice President Kamala Harris, as a *joyful warrior*. He emphasized this by stating, "And here's the thing about joyful warriors: they're still warriors." When I think about joyful warriors in the classroom, I remember my third-grade teacher, Ms. Dowling. She always had a smile on her face. As a white teacher in an almost entirely Black school, I imagine she faced some learning curves. Reflecting on my time as her student, I realize she rarely seemed upset. Her classroom was a space where we learned in ways I had never experienced before.

In my district, third grade was when students were identified for the gifted and talented program. I remember Ms. Dowling's persistence in ensuring I was included in that group. Although people always told me I was smart, this was the first time I truly felt smart. Despite the joy that filled her classroom, Ms. Dowling held us to high expectations. There were no excuses for missing assignments; everyone was expected to be engaged.

Though rare, I saw the warrior side of Ms. Dowling emerge at times. As with any group of third graders, there were moments when we fell short. Ms. Dowling didn't hesitate to shift gears and remind us of her expectations when that happened. Sometimes, that meant less or no recess or other adjustments to the joyful environment we had become too comfortable in. Joyful warriors are the ones who would say, "I am nice, but don't take advantage of me." They remind people that beneath their kindness, they are ready to fight when necessary.

As a joyful warrior, one recognizes the many things to feel anxious, frustrated, or discouraged about, yet chooses to focus on potential. Joyful warrior teachers acknowledge the inequities their students face but don't let those challenges dampen the joy in their classrooms. They create spaces where students can momentarily forget the obstacles against them and instead focus on how bright their futures are. I saw this in Ms. Dowling, too. My school was in a rough neighborhood, and much of the violence in the city happened around us or involved people who lived in the area. Still, I never remember feeling less than. In my research since then, I have learned that reports indicate that the school didn't meet specific standards. Yet, the teachers and administration fought to ensure students had the resources they needed, all while shielding us from the struggles behind the scenes.

Ms. Dowling's approach as a joyful warrior exemplifies the qualities of a pro-Black educator. Though not Black, she demonstrated a deep commitment to her Black students by acknowledging our challenges while affirming our potential. Pro-Black educators recognize that teaching goes beyond the curriculum; it's about affirming Black students' dignity, identity, and brilliance in a system that often fails to see them as such. Ms. Dowling worked to create a space where our identities were seen, valued, and nurtured. She understood that her role wasn't just to teach

academics but to help us see ourselves as capable, intelligent, and deserving of opportunities, even in a society that might tell us otherwise.

While the term "joyful warrior" is relatively new, the concept has long been present in Black culture. Toni Morrison highlights the emotional and psychological toll of enduring constant cycles of anger and resentment. Without dismissing the validity of these emotions, she reminds us of the importance of finding and nurturing spaces of love and joy, which are essential for healing (Morrison, 2020). She advocates for balance, urging Black people to fully experience life, focusing on thriving rather than merely surviving—resonating with the pursuit of joy amidst struggle. Teachers, as joyful warriors, must model this balance, creating classrooms that center both high expectations and spaces of joy for their students.

Schools as Sites of Love: Characteristics of Pro-Black Classroom Community Environments

Having an environment conducive to teaching and learning is essential for any classroom, but when that space is a communal space, there is room for holistic growth, both socially and emotionally. As with types of teachers, there is no singular way to create this environment. Some spaces will feel like Big Mama's house, while others might feel like the favorite auntie or uncle's house. What is clear is that shared values are established (Boutte et al., 2024), love is present (Baines et al., 2018; Johnson et al., 2019), and mirrors are provided for students (Sims-Bishop, 1990). We share two conceptualized spaces, sanctuaries, and brave spaces, that exhibit what a Pro-Black space can look like.

Sanctuaries

Smith (2022) conceptualizes sanctuaries as *truth spaces* where individuals can "come as [they] are" (Smith & Jackson, 2024, p. 17). Sanctuaries were conceptualized through the notion of *radical Black love;* creating a space where Black language is celebrated, Black authors and thoughts are the guides; and Blackness is centered. Smith (2022) describes sanctuaries as sacred places where students can be vulnerably and authentically themselves. These spaces allow and require individuals to *be*. Although this may seem rudimentary, many people—students and teachers alike—lack the space to be genuinely themselves, particularly against the backdrop of racism and other marginalized identities. In sanctuaries, these identities are recognized and affirmed, encouraging some form of expression to release or heal. Sanctuaries allow authentic self-expression through poetry or other forms (Smith, 2022).

Sanctuaries critique social inequities while embracing "otherness" and advocating for change. Their uniqueness lies in their dual function: they can serve as a hospital for some, offering healing while providing a platform for others, all within a space of "resilience, rejuvenation, and revitalizing education" (Smith, 2022, p. 23). At their core, sanctuaries are spaces of mutual love and respect.

While sanctuaries are magical, they are not without accountability. Within these communities, members are held accountable while receiving the necessary support to achieve their goals. As Smith and Jackson (2024) emphasize, "When sanctuary spaces are not created, educational institutions become reproducers of social inequities" (p. 16). Smith (2022) intentionally avoids rigid definitions of sanctuaries, viewing them as spaces without boundaries. She conceptualizes sanctuaries as defining places that help individuals *become* by first allowing them to simply *be* (D. Smith, personal communication, August 27, 2024).

Brave Spaces

Many educators strive to create a classroom that is a safe space where every individual can thrive by existing unapologetically and feeling affirmed (Howard, 2024). However, in some cases, the concept of safe spaces can lead to stagnation in the pursuit of safety. Howard (2024) challenges educators, especially those focused on equity, to broaden their approach from safe to brave spaces. Brave spaces require boldness, essential for transformative education (Howard, 2024). These spaces demand collective reasoning and action and an equally important commitment to self-evaluation. The critical dialogue within brave spaces necessitates vulnerability, honesty, and action. Howard (2024) contrasts safe and brave spaces, noting that while safe spaces might be "cordial, respectful, [and] congenial," brave spaces are "respectful, but challenging at times" (p. 6).

Everyone has a role to play in brave spaces, and this responsibility extends beyond the four walls of the classroom. It requires participants to speak up, even when they might not ordinarily do so. In brave spaces, disagreement is acceptable, and this can be fostered through strategies like accountable talk. Through accountable talk, students collaborate to tackle challenges, uphold guidelines that promote participation, and take responsibility for ensuring accuracy in their discussions (Resnick et al., 2018). In practice, this involves active listening, respect, and reasoning. Students must go beyond relying solely on their own thinking and instead use resources to support their arguments. Conversations might sound like, "I disagree with you because..." or "The point you made is valid, but have you considered...?"

In the context of Pro-Blackness, teachers must recognize that banter is a cultural expression that may include features like overlapping dialogue, which should be accommodated within accountable talk. Teachers, too, must be open to receiving accountable talk, even when it is uncomfortable (Howard, 2024). Practices like this enhance teaching and learning and prepare students for global citizenship. It is within brave spaces that growth occurs, even when accompanied by growing pains.

Bringing it All Together: Classroom Application

Having addressed educators and their spaces, we conclude by sharing examples of how Pro-Black classroom management looks in classrooms. It is important to note that classroom management or community building cannot be done in isolation and should include healthy relationships (as discussed in the educator section), environments (as discussed in the previous section), and curricula (Boutte et al., 2024). Holistically, it is restorative, unlike traditional punitive approaches, and focuses on the whole child. In each example, readers will see the social, emotional, and academic supports in place and elements of the Black Cultural Dimensions within.

Talk to Me Journals

Talk to Me Journals (Jackson et al., under review) provide a private space for personal reflection while also serving as a medium for communication between students and their teachers. These journals can be used in various ways, primarily encouraging students to reflect before reacting. I encourage students to release their thoughts and feelings on paper, especially when they prefer not to share with others. Journaling is a liberating and emancipatory task, enabling students to write meaningfully, centered on self (Dunn, 2021; Muhammad, 2012). It reinforces writing standards while providing a context that fosters self-efficacy and honors the "legacy of liberation struggle" Black people have experienced through reading and writing (hooks, 2013, p. 161).

While implementing Talk to Me Journals class-wide may not always be feasible, they can be effectively used with individual students who struggle to express themselves or need emotional support. For some, it becomes a safe haven and a source of resilience. Muhammad (2012) reflects on the experience of a Black girl involved in a writing institute where journaling was integral: "Writing was a means to escape. There are limitations in the physical world that there aren't when you write" (p. 208). With the removal of the need for political correctness, students often find it easier to experience freedom in writing (Muhammad, 2012). When using Talk to Me Journals, I always inform students of their freedom of expression while explaining my obligation to report certain disclosures. Despite this, students feel free to be open, honest, and vulnerable.

Community Conversations

Defining a classroom community is complex and dynamic. From familial nature to neighborhood feels, classroom communities should always be collectively conceptualized and happen naturally when space is made for relationships amongst all community members. As maintenance, we suggest incorporating regular time(s) for the class community to discuss grievances, progress, collectiveness, and critical dialogue (Jackson, 2023). Sometimes described as family meetings, these regular convenings extend beyond traditional morning meetings. These conversations are spaces where honest conversations about the real issues of the classroom or issues outside of the school may be impacting members.

These conversations will be needed as we cannot overromanticize the realities of classrooms and the behaviors that students bring. While some will be mitigated with the use of some of these strategies, there will be some behaviors that will remain an issue. With a foundation of relationships, the use of community conversations provides moments for members of the community to respectfully address problems or concerns that may have come up, expressing their feelings. This is also a time for the teacher to make amends for harm caused, receive feedback, and mediate conversations amongst peers. Readers can read about an example of community conversations in Jackson's (2023) *Starting with the Man in the Mirror: A Black Male Teacher's Use of African Diaspora Literacy to Reckon with Black Consciousness.*

Integrating Cultural Materials

Integrating cultural materials into the classroom is vital for supporting Pro-Black classroom management, as it helps create an environment where Black students feel seen, valued, and connected to their learning. Furthermore, it showcases the abilities of Black folx against the backdrop of mistold histories. By embedding resources that highlight the rich history, traditions, and contributions of the Black experience into the curriculum, educators not only validate the identities of their students but also foster a sense of belonging that is crucial for students' social, emotional, and cognitive well-being. When students observe their culture reflected in the content they engage with, it empowers them to take pride in their heritage and strengthens their connection to the material (Bristol & Martin-Fernandez, 2019). This connection leads to higher levels of engagement, as this allows learning to feel relevant and applicable to their lived experiences.

Although many teachers consider integrating cultural materials as adding inclusive book experiences, this integration can be much more dynamic than just text. As a classroom teacher, I (Ashley) would make it a point to embed and highlight Black histories in my teaching. For instance, in a Science

lesson on light/electricity, I would highlight Benjamin Franklin (as required by state standards) but also speak to the pivotal role that Lewis Latimer played in creating the filament that made lighting practical and affordable for consumers. This technique of intertwining pertinent facts, people, and places relative to the black experience allows students to "See themselves." Socially, this reflection promotes a communal environment where students can celebrate their culture together, building solidarity and mutual respect. Emotionally, it affirms students' identities, helping them develop a positive self-concept essential for resilience in the face of systemic challenges. Academically, these culturally relevant moments can bridge the gap between students' existing knowledge and new content, making learning more accessible and meaningful (Ladson-Billings, 1994). In this way, integrating cultural materials is not just an educational strategy but an act of empowerment.

Self-Reflection and Accountability

Accountability is a fundamental aspect of being Pro-Black. Without it, communities struggle to thrive, facing internal and external harms. Any approach to accountability must begin from within. Guiding students to take that first step of self-reflection places the responsibility on them to evaluate the impact of their actions and identify any harm or potential harm caused. Students might begin by considering reflection prompts, with adapted versions for younger students, such as:

- What did I do? (What happened?)
- How do my actions impact myself and others? (How did my actions make others feel?)
- Did I cause harm to anyone or anything? My plan to repair the harm is… (Did I hurt anyone or anything? How can I help fix it?)
- What could I have done differently? (What can I try next time?)
- My commitment moving forward. (What promise can I make to do better?)

From the responses, teachers should have reflective conversations with the student(s), including sharing wisdom, and should create necessary restorative plans. With the cocreated plan, the student is held accountable for future occurrences, repeating these steps when necessary and appropriate.

Conclusion

We conclude by challenging readers to ask themselves: *Will I help heal the land?* This work is essential not just for Black children but for all children. As Senator Raphael Warnock reminds us, we strive for "a nation that gives every child a chance," understanding that when Black children thrive, others also thrive. We reject the notion that Pro-Blackness is a zero-sum game. Supporting Black children does not come at the expense of others; instead, it acknowledges the truth that "if you're pro-Black, you are actually pro-everybody, because you can't be pro-everybody if you're not pro-Black" (Suarez, 2022, p. 11).

We cannot sit idly by and expect transformation to happen for Black students. This does not work for Black educators alone but for all committed to justice and equity. Engage actively with materials that center Blackness in classrooms, such as resources on Pro-Blackness (Boutte et al., 2024; Braden et al., 2022; Williams, 2022; Wynter-Hoyte, 2022), teaching Black history (King, 2016, 2020), and other Black-centered pedagogies (Boutte et al., 2023; Muhammad, 2020; Wynter-Hoyte et al., 2022). These resources are not just tools but essential frameworks that can guide educators in creating spaces where Black students can thrive.

There is no singular approach to Pro-Black classroom management; its dynamic nature requires educators to continuously reflect on their practices and adjust as necessary to meet the needs of their students. This ongoing work demands difficult self-reflection and the willingness to relinquish power, ensuring that all students, particularly Black students, are supported in a way that honors their dignity and potential.

Black children need healing, and this work is neither simple nor swift. It involves addressing generational trauma as well as confronting contemporary inequities. Healing is not just a task for individual students but a collective responsibility that requires the engagement of educators, families, and communities. As hooks (2000) reminds us, "Rarely, if ever, are any of us healed in isolation. Healing is an act of communion" (p. 215). We must recognize that our collective well-being is intertwined, and by working together to support Black children, we contribute to *the healing of our land.*

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Restoring the Land

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Extending Culturally Responsive Classroom Management to Enhance Contemporary Classrooms: A Conceptual Framework

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Extending Culturally Responsive Classroom Management to Enhance Contemporary Classrooms: A Conceptual Framework

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Abstract

Twenty years ago, Weinstein and associates' (2003) Culturally Responsive Classroom Management (CRCM) framework began a conversation regarding the lack of cultural neutrality within traditional classroom management practices. Despite the framework's growing attention throughout previous literature, there has yet to be substantive changes in U.S. disciplinary practices. Prior focus has been on the framework's explicit tenets (i.e., praxis and environment); however, we argue its implicit tenets (i.e., self, other, context) to be paramount and necessitates dedicated attention. In this conceptual article, we present an alternative view of CRCM's framework and extend the initial authors' perspective within its core areas: *self, other, context, praxis*, and *environment*. We outline CRCM within a recursive and reflective process to be engaged throughout a teacher's career. This paradigm offers considerations for academics and practitioners to rethink teacher preparation, and in-service support, for this key pedagogical skill to be more equitable amidst contemporary classrooms.

Keywords: Culturally responsive classroom management; paradigmatic shift; recursive practice; socio-cultural interactions

Introduction

It has been 20 years since Weinstein et al. (2003) introduced culturally responsive classroom management (CRCM) as a counter to traditional modes of teacher control within classroom discipline, often based on a system of external positive and negative reinforcements (Wubbels, 2011). Evidence supporting CRCM indicates a relationship between enactment and outcomes including improved student perceptions of their learning environment (Larson et al., 2018), cultural competence development (Cartledge et al., 2015), justice-oriented discipline (Caldera et al., 2019; Kavanagh, 2017), and positive student behavior (Larson et al., 2018). Despite these important findings, there has been little progress in systematically developing teachers' CRCM skills (Grossman et al., 2014; Johnson et al., 2012), specifically within diverse classroom settings (Bottiani et al., 2018).

While CRCM development should occur during training, few preparation programs offer classroom management-focused coursework let alone discussion of culturally responsive practices (Caldera et al., 2019; Kwok et al., 2020). Once in the classroom, the disconnect between teachers' CRCM self-efficacy and students' perception of their cultural responsiveness perpetuates (Bru et al., 2002; Poulou, 2009) as observed with the continued application of punitive disciplinary measures against students of color (Perera & Dilibert, 2023). Despite best efforts to address these issues, scholars in the field continue to highlight the mismatch between implementation and effectiveness (Bal, 2018). As such, a holistic framework does not exist that speaks to the nuanced approach needed for CRCM preparation and enactment leaving CRCM an elusive foundational pedagogical skill in contemporary classrooms. Simply stated, while teachers may speak to their use of CRCM practices, the known benefits of its enactment have yet to be realized. In response, we present an alternate view of the CRCM framework that mandates intentional focus on its *implicit* tenets before there can be any

discussion of its *explicit*. We begin with a discussion on the framework's background, followed by an in-depth look of each tenet, inclusive of considerations for implementation. We conclude with comments about how the education and academic communities can push this work forward.

Background

Intent of CRCM

CRCM aids teachers in creating supportive and inclusive classroom environments that recognize and value students' cultural diversity. Five tenets guide this paradigm, shown in Figure A: (1) recognition of one's own ethnocentrism and biases; (2) knowledge of students' cultural backgrounds; (3) understanding of the broader social, economic, and political context of our educational system; (4) ability and willingness to use culturally appropriate classroom management strategies; and (5) commitment to building caring classroom communities (Weinstein et al., 2003). The authors clarify that while their tenets were comprehensive, they are also progressive in nature. They spoke of the framework as "a frame of mind as much as a set of strategies or practices" (2003, pg. 275), with a more nuanced rewording in their subsequent article: "underlying our discussion is the premise that CRCM is a frame of mind, more than a set of strategies or practices, that guide the management decisions that teachers make" (Weinstein et al., 2004, pg. 27).

The authors stated that for CRCM to be effectively implemented, teachers must first identify their biases and values and reflect on how those aspects influence their assessment of student behavior. Ultimately, teachers should understand that classroom management is not a skill that facilitates compliance or control, but "CRCM is classroom management in the service of social justice" (2004, pg. 27). In essence, CRCM recognizes and centralizes differing cultural frames of reference in relation to classroom management.

Figure A

Process for CRCM Development
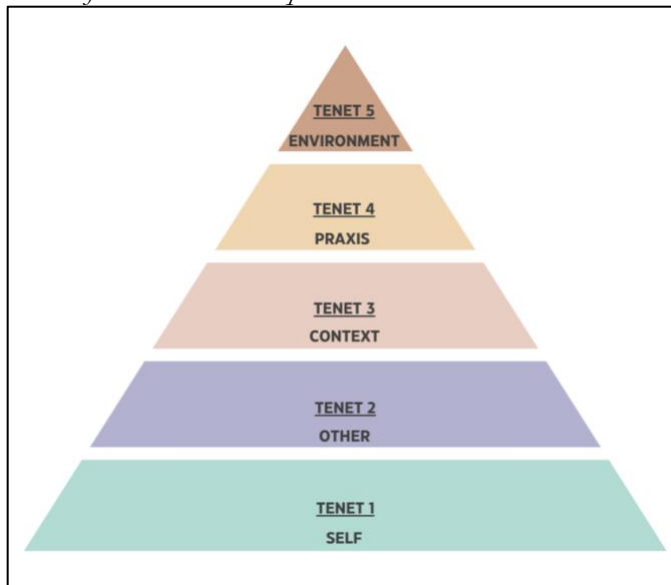
For teachers to develop into culturally responsive classroom managers, they must critically interrogate themselves in concert with the rest of society. Classrooms are not ancillary to the structures of society at-large. Rather, classrooms can often be places that perpetuate structural inequities from society (Skiba et al., 2022). The beliefs, experiences, and perspectives that educators bring into the classroom greatly influence their interpretation of student behavior (Civitillo et al., 2019). For example, Starck et al. (2020) found that teachers possess similar explicit and implicit racial biases to that of nonteaching adults with comparable characteristics. These findings echo literature that highlight the disconnect between the predominate belief that schools are places that promote racial equity, and the contrasted beliefs held by teachers (Chin et al., 2020; Hambacher & Ginn, 2021). It is necessary for teachers to recognize the intent of CRCM and delve into their own beliefs and values.

CRCM Concerns

At present, there exist two areas of concern regarding CRCM: inclusion and focus. As a result, there is yet to exist a holistic approach to CRCM's enactment.

Inclusion

Literature speaks to the impact of the type and depth of classroom management training during preparation having a direct impact on teachers' management conceptualization (Jones & Vesilind, 1996; Kwok, 2020) and enactment (Headden, 2014; Kwok, 2019). Unfortunately, there is a dearth of CRCM-specific coursework within teacher preparation (Greenberg et al., 2014; Skepple, 2015) and professional development (Svajda-Hardy & Kwok, 2023). Considering teacher preparation, explicit inclusion of CRCM training within accreditation policies that guide teacher education programs is sparse. Borne from Ladson-Billings' (1995) culturally responsive pedagogy (CRP) and Gay's (2002) culturally responsive teaching frameworks, there is potential for exposure to aspects of CRCM within other pedagogical coursework; however, evidence of any culturally responsive training is lacking (Muñiz, 2019).

Once in the classroom, teachers need continued context-specific management support, especially as they encounter differences between the teachings of their preparation program, discussed prior, and the expectations of the school and public (Bettini & Park, 2021; Camacho & Parham, 2019). Unfortunately, there exist few opportunities for teacher professional development related to CRCM (Larson et al., 2018; Williams et al., 2022) outside of program-specific endeavors (e.g., Bal, 2018; Vincent et al., 2011).

Focus

Throughout studies examining CRCM, much of the focus lies on its application within classrooms (Gaias et al., 2019; Larson et al., 2018; Siwatu et al., 2017) rather than considering what the framework's authors highlighted as the important first steps or prerequisites. Like an analogy of an iceberg (shown in Figure B), attention can be drawn to the explicit or visible components rather than the implicit or non-visible components, which we argue, are the most crucial.

**Figure B**

Typical Conceptualization of CRCM
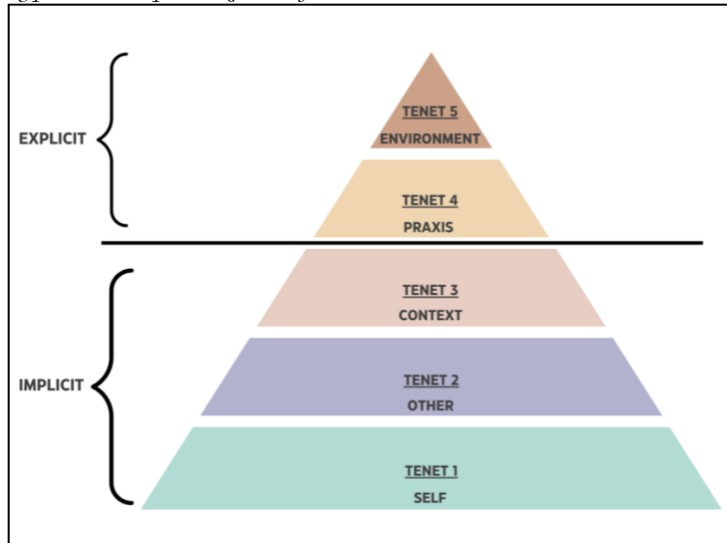
The explicit components centralize on teacher praxis and the classroom environment, both of which are more readily observable and thus receive the bulk of focus within scholarship. However, CRCM's prerequisite tenets—which are non-visible—are arguably more consequential as these directly influence the authentic enactment of praxis and environment.

For CRCM to be embedded throughout classrooms, Weinstein et al. (2003) offer that the explicit components must be centered on understanding "'the *self*,' 'the *other*,' and the *context* [emphasis added]" (p. 270). Specifically, Legette et al. (2020) contend that without an emphasis on teacher social awareness, self-awareness, self-management, responsible decision-making, and development of relationship skills, cultural disconnect in classrooms and associated negative effects will persist. Despite the necessity of these prerequisites for teachers' development, there have been little observable changes throughout disciplinary data (Perera & Dilibert, 2023; Williams et al., 2020). We propound that teachers' persistent struggle with CRCM implementation (Bondy et al., 2007; Kwok & Svajda-Hardy, 2021), and the continued racialization of discipline (Skiba, 2015), are the result of inadequate consideration of the self, the other, and the context. To date, there have been no prior attempts at addressing the concerns related to CRCM enactment through a revisioning of the original authors' intent. As a result, we present an alternative view of CRCM which requires a refocusing on the prerequisites within the parameters of the existing framework. We propound that by reconsidering the way we think and talk about CRCM's tenets, in teacher education and research, there is potential for authentic change leading to solutions to problems such as racialized discriminatory practices.

Alternative Thinking of CRCM Enactment

While educators may want definitive answers to issues faced in the classroom, CRCM requires iteration throughout one's career, illustrated in Figure C.

Figure C

CRCM Enactment Across the Plane of Time
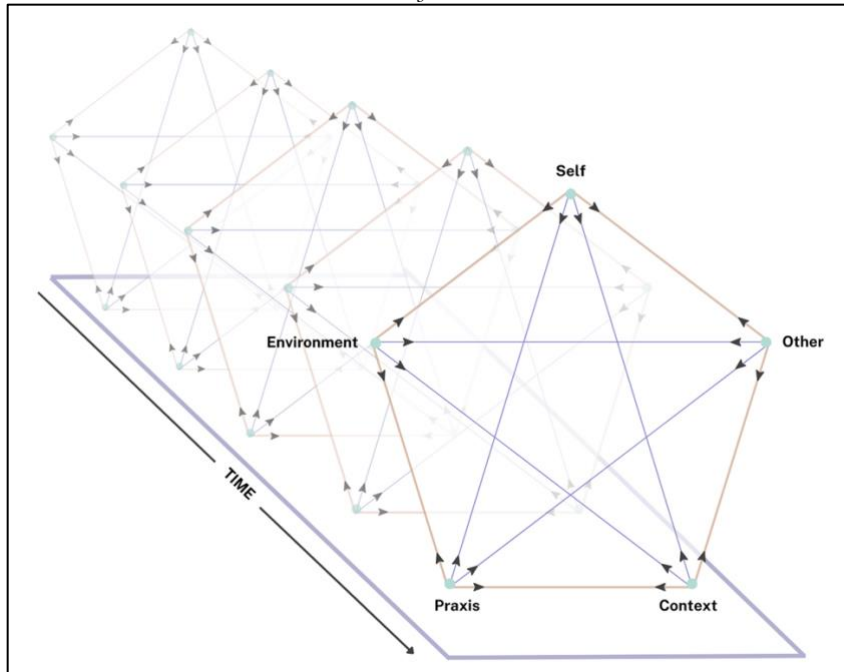
The process by which teachers interact with CRCM touches each tenet throughout and across time, as shown on the z-axis. Every encounter with a student, inside and outside of the classroom, necessitates reflection towards an individualized approach to classroom management. Specifically, the framework requires consideration and interaction of all tenets, depicted as an equiangular pentagon representing equivalent value of all tenets. As time progresses, teachers should change as individuals just as classroom demographics and educational spaces continually evolve. The framework progresses forward throughout time because teachers ought to continually reevaluate their tenets and how they are meaningful (or not) to managing students. We acknowledge that addressing each tenet with each student and every interaction is daunting and untenable. However, the premise of this framework is to encourage teachers to engage in constant conversation with themselves, students, and colleagues to reflect on aspects of their classroom management that are and are not culturally responsive.

When teachers merely attempt to incorporate CRCM practices, it is mistakenly easy to do so from an ahistorical approach which negates the intricacies of their own experiences and perspectives with that of students, families, community, school-context, and systematic structures. Attention is placed on teacher actions that can be observed and quantified for evaluation (i.e., strategies, communication, etc.). Rather, we argue that the prerequisites of *self*, *other*, and *context* should be spiraled throughout a teacher's professional career to ensure enactment of *praxis* and *environment*. As this process ensues, praxis and environment will similarly be re-addressed to ensure teachers pinpoint the needs of students effectively. For authentic implementation of each tenet, certain assumptions must be considered, discussed next.

Implicit CRCM Demonstration

The following is an assessment and corresponding discussion of CRCM prerequisites. We consider these to be implicit aspects of CRCM that are internal to an individual, as they may not be directly observable by others. However, when teachers self-analyze these prerequisites, the result can inevitably affect explicit practices.

The Self

To begin, teachers must consider how they define and view culture. Without adequate self-introspection about this specific prerequisite, teachers can fall prey to their own cultural encapsulation (Banks, 1994). For teachers, this potentially leaves them unaware of how their own racial and ethnic identity influences their interpretation of students' cultural experiences (Tenenbaum & Ruck, 2007). This is further problematized when White preservice teachers, who enter the workforce as the majority demographic group, fail to view themselves as cultural beings. This leaves them viewing their own cultural lens as normative to all humans (Sleeter, 2008), which often does not reflect the backgrounds of their eventual students (Redding & Nguyen, 2020).

For this prerequisite, we extend traditional ideas of culture to match the changing landscape of our classrooms. Rather than simply one's physical attributes or societal artifacts, culture is the culmination of individuals' ancestral history, genetic makeup, and interaction with the past and present (Schein, 1991) while also consisting of each's beliefs, assumptions, and bias. We argue that teachers must consider cultural identifiers beyond race and ethnicity, which can often inform individual's valuation of human behavior (Kluckhohn, 1951; Kroeber, 1952). That is, determination of what behaviors are socially acceptable is impacted by cultural experiences. When we think about culture, we must move beyond the notion that race and ethnicity encompass the boundaries of cultural consideration.

Consideration. The process of introspection requires teachers to delve into their personal beliefs and biases—both explicit and implicit—that inform their behaviors and worldviews about diverse student groups (Esteban-Guitart, 2021; shown in Figure D) and potential disciplinary practices (Milner, 2012).

Figure D

The Self

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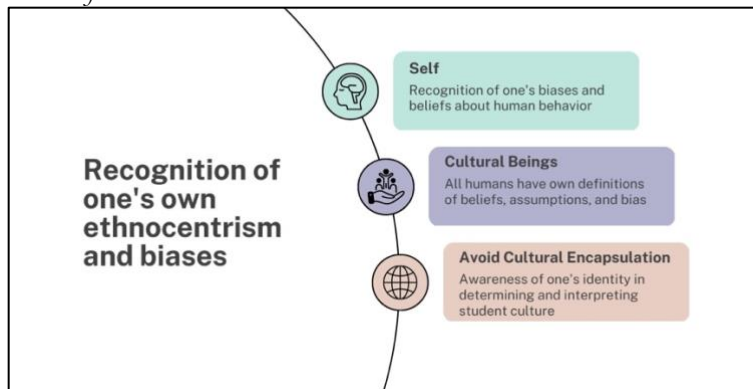
Manifesting in deficit ideologies, judgement of student experiences can span familial, cultural, community, linguistic, and economic differences (Hambacher & Thompson, 2015; Nelson & Guerra, 2014). In a study evaluating teacher beliefs in two school districts from Texas and Michigan, Nelson and Guerra (2014) found teachers to seek technical solutions for deficit-related views of student behavior without considering the impact of their own views on the social aspects of student identity, culture, language, and relationships. Such findings highlight the necessity for teachers' evaluation of their own beliefs in concert with students' lived experiences.

Expanding teachers' consideration of what constitutes as culture, literature highlights the ways culture intersects with the classroom, including student migrant status (DeMartino, 2020), parental involvement (Zarate, 2007), student home lives (Templeton, 2013), socioeconomic status (Gorski, 2019), personal values (Castro, 2010), and sexual orientation (Swanson & Gettinger, 2016). This compels educators to consider a complicated myriad of characteristics and identifiers while reflecting on potential biases influencing interpretations of behavior.

Below, we posit scenarios that address some of these identifiers in Table 1. We acknowledge that these examples are not exhaustive or neutral, and how an individual answers them does not entirely reflect their personal beliefs. We present them solely as illustrations beyond the centrality of ethnocentrism and cultural biases that similarly influence classroom dynamics. We also recognize that teachers can respond in multiple appropriate ways to each example. Managing in a culturally responsive way demands personal consideration of beliefs with the determination of individual student behavior, personality, and interpersonal interactions.

Table 1

Cultural Scenarios

Examples	
- What if I have a student who has had an abortion? - What do I believe regarding students who have committed a crime? - How do I view overweight people? - Do tattoos signify a specific socioeconomic class or social more? - How do I view divorce? - Do I seek to lay blame for divorce on one parent versus the other? - If my students consistently move between separated parents, do I believe it the student's fault if they are not prepared with all necessary materials? - Do I feel threatened by wealthy parents? - Do I hold differently-abled students to a decreased level of academic expectation? Behavioral expectation? - What are my beliefs surrounding my students' sexual behaviors? - How do I feel about students who identify as LGBTQIA+? - Do I believe these students should be allowed to participate in sports? Have separate bathrooms? - Does the use of foul language signify a certain level of class? - If a student identifies as Christian, do I have higher expectations for their behavior? - How do I feel about religious beliefs other than mine? - What if I have a student who professes they are Atheist? Agnostic? Wiccan?	- Do I believe that, in general, girls are meeker and better behaved than boys? - Do I believe that "boys will be boys" and there isn't a lot that can be done about it? - Are Black boys more aggressive than white boys? - Am I excited when I see that I have Asian American students on my roster because I believe they will be smarter and will try harder than non-Asian American students? - Do I think sex education should be taught in schools? - If a male student sags his pants, do I think this is trashy or classless? - When female students wear tight, low-cut, or short clothing do I assume they are sexually active? Do I assume they have been exposed to pornography at home? - Am I scared to meet with parents of a different race? - If a student comes to school smelling bad or with poor hygiene, do I keep my distance? Do I talk about them with other teachers? - Do I believe that students who smoke or do drugs come from homes without parental oversight?

Academics and practitioners alike must move away from a siloed definition of culture in classroom management by highlighting some of these other identifiers. As teachers encounter these differences, they must determine how their own beliefs could harm student relationships. For instance, a teacher may believe a parent is not adequately involved in their child's education, without considering additional factors (e.g., culture, history). Such a belief can manifest in a teacher's lack of communication with the parent, leading to issues of trust and openness about the student's success. Further, these initial beliefs can turn into noticeable actions and eventual feelings of disconnectedness for the parent.

Once teachers have identified potential negative beliefs, they should consider alternative ways of thinking to mediate the effects. In the above example, the teacher should question the root of their belief, specifically, considering the possible reasons for the parent's lack of involvement. Reflecting on one's own beliefs allows the teacher to identify alternative approaches to involving the parent in their child's education.

Internal processes like these should be ongoing and reflective throughout teachers' professional career. However, attempting to maneuver its complexities without support can be daunting. We recognize that engagement in the process should include partnership with others via observation and dialogue with effective teachers, administrators, and parents. While self-identification of potential bias is important, others can assist or extend the interpersonal change necessary for effective CRCM. Through observation, feedback, and discussion, teachers may discover harmful management actions. Kwok and Svajda-Hardy (2021) found that when classroom management coaching was provided to beginning teachers, conversations about bias in teachers' classroom management facilitated development of more culturally responsive practices. Similar findings have identified the process of observation and feedback to propel more responsive teacher praxis (Kwok et al., 2021; Svajda-Hardy & Kwok, 2023). Reflection on possible causes of teacher actions forces individuals to consider their own determination of culture and its impact on the classroom environment. As the student population continually diversifies, so then should teachers reflect on how their students' cultural identifiers fit in the classroom. Through this process, teachers reflectively grow in their own cultural identity and appreciation of their students.

The Other

In Weinstein et al.'s (2003) introduction of CRCM, they were careful to present the *other* (i.e., tenet 2) as teachers' acknowledgement that differences exist between humans by cultural identifiers, which could also then influence perceptions of behavior. This tenet prompts teachers to understand that despite students being members of cultural groups, each is an individual, and broad assumptions must be avoided. Cultural stereotypes based on a monolithic ideology can limit a teacher's ability to authentically connect with students while also inhibiting the development of culturally responsive behavioral reactions.

Instructionally, broad assumptions of a cultural group can be seen, for example, in teachers' approaches to English Language Learners. As explained by Harper and DeJong (2004), presumptive instructional practices can include: 1) exposure and interaction results in the same level of language acquisition; 2) processes for second-language learners are the same regardless of native language; 3) instructional mechanisms for native English learners are the same for second language learners; 4) nonverbal support meets the needs of all second language learners. The authors emphasize the

limitations of language learning based on assumptions, despite teachers' attempts to create positive and effective learning environments.

Similarly, assumptions of student behavior can have equally detrimental effects. For instance, Annamma et al. (2019) found that Black female students receive harsher consequences than female students of other racial and ethnic groups for the same behaviors. These findings support prior discourse about educators' perceptions of Black females being less innocent and feminine than other females, which can lead to increased use of exclusionary disciplinary practices (e.g., Morris, 2012; Thompson, 2004). Carter Andrews et al. (2019) highlight this stereotype by finding that—for Black female students specifically—these assumptions can create hostile learning environments and feelings of disengagement from teachers and even their own cultural identity. Evidence of teachers' cultural assumptions extends to other areas such as special education (Lane et al., 2022), gender (Stromquist, 2007), and socioeconomics (Payne, 2013).

Cultural assumptions stem when teachers apply a broad observation of students and view them as a "whole" rather than "individual." Such views place teachers in a position of power as the determinators of what constitutes a cultural difference, and thus, how cultures are considered within one's management. This isolationist view of students' cultural backgrounds can perpetuate deficit-framing found within teachers' practices (Paris, 2012).

Consideration. As shown in Figure E, learning about, and acknowledging students' cultural differences informs teachers' perceptions of behavior and pushes teachers to disrupt cultural stereotypes.

Figure E

The Other
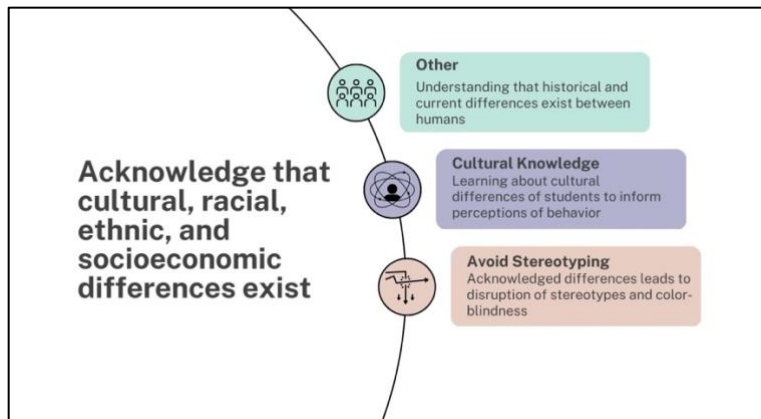
Teachers may adopt behavioral views of culture believing this to be an inclusive pedagogical strategy. However, they may limit the cultivation of a welcoming classroom environment and their ability to meet student needs. CRCM debunks this assumption by placing students at the center of teachers' cultural understanding by acknowledging that culture is not a fixed point but in a state of constant change (Irizarry, 2007). Examples may include social assumptions towards Asian American students and eye contact, gender differences in Attention-Deficit/Hyperactivity Disorder, or that students with Autism Spectrum Disorder will be socially withdrawn. These types of adopted stereotypes limit understanding of the cultural differences by placing students in stagnant groups

rather than acknowledging each as an individual with their own needs. Rather, when teachers think about culture, they must question assumptions about behavioral norms (i.e., stereotypes), which should inform classroom management decisions.

The Context

Schools and classrooms are microcosms of society-at-large and can be places that either limit or perpetuate the discriminatory practices of outside systems (Skiba et al., 2022). The final prerequisite for CRCM implementation is the understanding for how differences in "race, social class, gender, language background, and sexual orientation are linked to power" (Weinstein et al., 2003, p. 270). Schools facilitate power dynamics through educational standards that implicitly promote colonialism within American schools (Irby, 2014; Warnick & Scribner, 2020). This is more evident in schools that sanction zero-tolerance policies that exacerbate discriminatory disciplinary practices towards minoritized students (Huang & Cornell, 2021; Perera & Diliberti, 2023). Teachers' development in understanding context pushes them to question the curricular and disciplinary focus on their campuses, while identifying how each could perpetuate culturally irrelevant or inequitable practices. Specifically, teachers should be alert to issues of institutionalized discrimination, individualized prejudicial practices, and power dynamics linked to historically racial or cultural mores (Weinstein et al., 2004; see Table 2).

Table 2

Examples of Context Practices

Issue	Example	Explanation
Institutionalized discrimination	Tracking	• Standardized testing leads to placing students into groups which can limit academic growth and achievement.
		• Creates inequitable competition between students, teachers, schools, and districts.
		• Behavioral tracking stigmatizes students and perpetuates disproportionate disciplinary practices.
	Dress Code	• Lead to discrimination of minoritized populations and female students.
	Resources	• Financial and human capital constraints limit opportunities for teacher professional growth.
Individualized prejudicial practices	School Diversity	• As schools diversify, minoritized students feel more scrutinized than non-minority peers.
	Discipline Policies	• Teacher bias impacts decisions and actions toward student behavior.
		• Zero-tolerance policies implicitly impact minoritized students.
Power dynamics	Meritocracy	• Belief that individual achievement is based on one's abilities and is not impacted by external sources.
	Curriculum	• Leaders making decisions that limit student exposure to culturally relevant, historically accurate, and scientifically-supported curriculum.

Unfortunately, with limited exposure to such discussions throughout preparation (e.g., Kavanagh, 2017), many in education have adopted harmful social mindsets, including color-blindness, into their pedagogy (Milner, 2011; Ullucci & Battey, 2011). While perhaps well-intentioned, the avoidance of race when discussing how we interact with each other restricts the ability to address ingrained

educational issues. Such practices can be seen when teachers attempting to exhibit equality purport a stance that "race does not matter" (Pollock, 2004), However, as discussed by Apfelbaum et al. (2012), the prevalence of color-blindness can lead to greater displays of explicit and implicit bias (e.g., Son & Shelton, 2012). Consequently, the minimization of racial differences can lead teachers to fail in their questioning of discriminatory practices (Bonilla-Silva, 2013), which is to deny that changes are necessary. For example, district dress code policies have come under scrutiny in recent years by questioning the male and White middle-class centered norms (Aghasaleh, 2018; Jones & Robinson, 2021).

Similarly, teachers have unwittingly adopted a pedagogy of poverty without considering how such practices consistently promote structural discrimination (Haberman, 2010). For example, teacher beliefs around student compliance (e.g., ranking of students based on perceived handicapped homelives, the forced learning of basic skills) limit students' abilities to develop academically and socially. These beliefs also exacerbate deficit views of students' lived experiences. As a result, students of poverty are constrained to classrooms with culturally elusive curriculum and teachers possessing low academic expectations. This is pronounced by preservice teachers having limited exposure to individuals of poverty (Hilton & McCleary, 2019) and often viewing students and families of poverty as needing to be saved (Aronson, 2017) or fixed (Gorski, 2008), rather than considering their backgrounds as assets to learning.

Consideration. To counter such practices, teachers must understand the myriad ways that structural systems perpetuate discriminatory societal practices and find opportunities to disrupt them, shown in Figure F.

Figure F

The Context
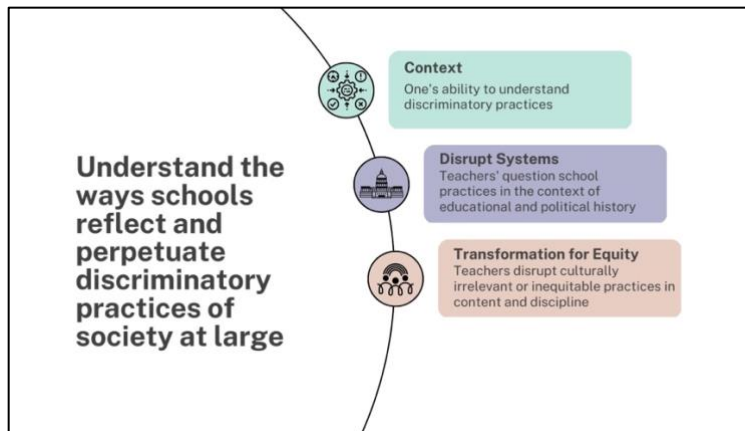
For example, there should be space within teacher preparation for the teaching of historic and current systematic discriminatory practices (Gutiérrez & Vossoughi, 2010; Lemley, 2014). Focus can include historical disciplinary practices birthed from integration following *Brown v. Board of Education of Topeka, Kansas* (Irby, 2014); federal support for special education programs used to control students deemed unfit for the general education setting (Warnick & Scribner, 2020); and increased use of exclusionary discipline and corporal punishment in the attempt to control behavior in the face of Cold War pressure for increased academic rigor (Urban & Wagoner Jr., 2009). Once in the

classroom, discussion on relevant topics should ensue, such as societal pressures to limit definitions of cultural identity (Walker, 2023).

Accordingly, teachers can use this knowledge to critically question whether existing practices limit students' abilities to grow academically and/or hinder their social-emotional health leading to the dismantlement of such systems. For instance, participating in district-level committees looking to address discipline practices, seeking opportunities to provide students with necessary dress code items (i.e., belts, lanyards, etc.), and embedding lessons with culturally relevant content. When implemented with intention and fidelity, CRCM pushes against current systems and brings together teachers' cultural understandings and knowledge of students to create equitable educational experiences. When teachers question existing disciplinary and academic structures and implement effective non-punitive approaches, they become transformative agents in their classrooms and beyond (Lemley, 2014).

Explicit CRCM Demonstration

The following is a discussion of the explicit, or observable, tenets of CRCM. These tenets are a natural observation of teachers' addressing the CRCM prerequisites. Again, these tenets should adapt throughout a teacher's career as they continue addressing the self, other, and context, which we expressed should be prioritized first.

Praxis

When teachers apply their cultural understanding to their management praxis, they are better equipped to support students in a way that promotes academic engagement and feelings of connectedness to the content. For this to happen, teachers must consider three things, shown in Figure G: 1) their perception of student behavior; 2) how traditional modes of management interact with student cultural identity; and 3) how and when to expect mutual accommodation.

Figure G

The Praxis
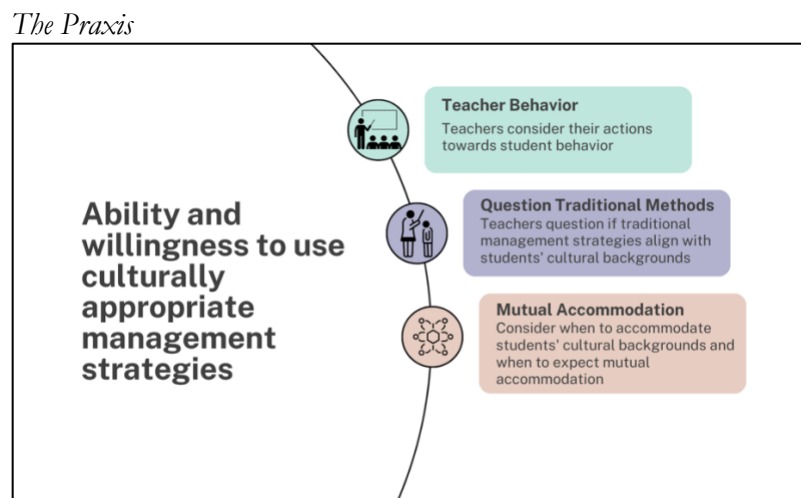
Despite studies identifying the inclusion of culturally responsive strategies in teachers' praxis (Bondy et al., 2007; Gaias et al., 2019; Larson et al., 2018), why do discipline disparities still exist? Even

amidst state and district adoption of large-scale programs offering solutions to racial and cultural disparities (e.g., Positive Behavior Interventions and Supports (PBIS) and Restorative Justice), there has yet to be observed changes in existing racial discipline gaps (Perera, 2022). These programs often develop towards tangible CRCM implementation but may speak further to the consideration of CRCM's prerequisites. When teachers examine and address the personal biases and beliefs towards students of color, behavioral disparities can be mitigated (Carter et al., 2017; Gregory et al., 2016). Further, when combined with programs like PBIS, schools observe a decline in disciplinary disproportionality (McIntosh et al., 2021). When teachers incorporate culturally responsive strategies in tandem with their consideration of existing bias in response to student misbehavior, positive outcomes are attainable.

As teachers recursively address CRCM's prerequisites, they must next attend to alternative modes of classroom management. Such strategies can include identification of antecedents informing behavioral correction (Trudel et al., 2023); allowing students and families to participate in discussions regarding school policies and procedures (Walker & Pankowski, 2023); supporting students as they re-enter the learning environment following conflict (Darling-Hammond & Fronius, 2023); and multitiered systems of support allowing for individualized management based on student need (Simonsen et al., 2023).

The final piece of the praxis tenet includes mutual accommodation between teachers and students. When teachers engage in mutual accommodation, they learn to "accept and build on students' language and culture but also equip students and their families to function within the culture of the school in key areas needed for academic progress and order (e.g., attendance, homework, punctuality)" (Weinstein et al., 2004, pg. 32-33). Essentially, mutual accommodation is the balancing of expectations. Teachers need to understand when to support students' individual needs and when to expect students to meet classroom expectations.

For example, if a student struggles with attention deficit disorder, allowing them to work on an assignment in a separate, quiet environment is allowable. However, if the class will be participating in a school-wide assembly about state testing requirements, the student should be expected to attend. Culturally, teachers can help students understand their role in society while also respecting the student's beliefs. This is seen when schools participate in the Pledge of Allegiance each day. For a student who feels it necessary not to participate in the pledge, the teacher can engage in a discussion about the student's decision and allow the student to kneel while others stand. In so doing, the teacher supports the student in voicing their perspective amidst demonstrating respect for their decision. This practice substantiates a foundational principle of our nation (i.e., freedom of speech), yet requires the student to participate in some form (kneeling versus remaining seated). Thus, mutual accommodation empowers the teacher in supporting students' needs while assisting in students' social development. As strategies become culturally responsive, the classroom environment naturally lends itself to an atmosphere that authentically welcomes students as they are rather than vessels expected to denounce their cultural background, described next.

Environment

The culminating piece of CRCM's implementation is the environment created out of teachers' self-reflection, as it meets the strategies enacted. However, as with praxis, the environment should be continually adapted to address the individualized needs of students. Just as CRCM's prerequisites require ongoing consideration throughout a teacher's career, so should the classroom environment

they work to create. Shown in Figure H, the classroom environment is developed through teacher-student relationships, teacher acceptance and inclusion of student diversity, and student commitment to the class community.

Figure H

The Environment
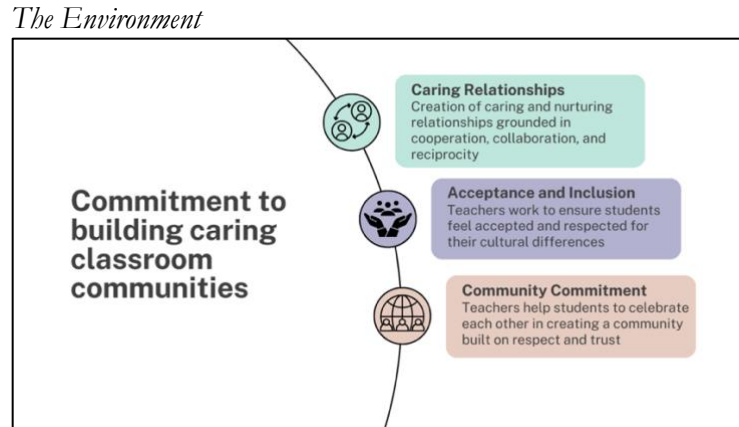
Despite one's belief in their ability to foster caring and nurturing relationships, teachers' relational capacity can be a limitation towards development. Relational capacity is understood as a mutual relationship where support is reciprocal and responsibilities are shared (Edwards & D'Arcy, 2004). When teachers have low relational capacity, they rely on behaviorally focused management practices rather than academically or relationally (Kwok, 2017), with more pronounced findings in beginning teachers (Kaufman & Moss, 2010; Wolff et al., 2015). In this, the classroom environment is centered on teacher control and student compliance. However, studies have shown that when developed, teachers' classroom management becomes more nuanced (Kwok & Svajda-Hardy, 2019).

McHugh et al. (2013) investigated the relationships between teachers and students in the classes. Teachers created intentional relationships by learning about their students' interests, home lives, and culture. This is further exemplified by Milner (2011), who describes micro-level classroom practices as opportunities for relational engagement. This includes practices such as talking with students about their interests, use of this knowledge in the creation of class assignments and encouraging student sharing, engagement in student-centered discussions, and attending extracurricular activities demonstrating the teacher's desire to engage with students outside of the curricular environment. When students feel known by their teacher, they view themselves as an essential part of the classroom experience.

Relationships also express classroom acceptance and inclusion that can lead to a commitment to community fostered by students themselves. Juvonen et al. (2019) emphasize the promotion of social inclusion throughout the class; however, they caution that teachers must be aware of group and interpersonal dynamics, and how school practices can exacerbate student differences leading to further group divisions. Authors present four strategies that aid in this process including: maximization of diversity and equitable access, teachers' awareness and use of inclusive strategies, celebration of shared goals outside of the class environment, and facilitation of cross-and-inter-group friendships. Through these strategies, students feel more connected to the learning environment, their teacher, and their personal identity. From this, the goal of CRCM is achieved when teachers facilitate a learning environment based on teacher-student relationships.

Moving Forward

Weinstein et al. (2003) created a framework with specific attention paid to its prerequisites. Despite increasing interest in CRCM's implementation, we have yet to see real-world shifts in how teachers manage behavior. We believe that solely instituting culturally responsive management strategies does not foster systematic change. We must evolve conversations about CRCM in teacher preparation and professional development by creating an environment that welcomes difficult discussions on teacher cultural identity and bias, student cultural background, and systemic barriers to educational success. Also, such conversations should exist in safe spaces where teachers feel comfortable sharing areas of concern and receiving feedback from others. However, as presented, these opportunities must be ongoing throughout a teacher's career as teachers, students, and systems change. Considering that the product of CRCM is the creation of classrooms that are safe and inclusive for all learners, its prerequisites are necessary rather than suggestive. Additionally, as we have presented, these should be recursively examined in concert with CRCM's final tenets throughout one's career. For this to happen, three items must be attended to.

First, teacher preparation should include discussion about the effect of teachers' racial and cultural identity in anticipation of classroom management decisions (Pollock et al., 2010). Teacher educators must prioritize CRCM within coursework in multiple courses in the context of students' cultural differences (Kwok, 2021). Additionally, authentic encounters with CRCM's prerequisites can help preservice teachers develop a deeper understanding of their importance (Donahue-Keegan et al., 2019).

Second, professional development should contextualize teacher support (Gaias et al., 2019) based on the cultural identities of a school's students. In so doing, teachers become accustomed to engaging in difficult discussions while considering their own students' cultural identity and needs. Professional development should be centered on teachers' actions in conjunction with their conscious learning from students and the education community (Szelei et al., 2020). Teachers should develop their cultural awareness—in conversation with members of the local community—to identify systemic barriers and collectively construct localized approaches that support the assets of students.
Third, research must re-focus on CRCM's prerequisites rather than on the explicit demonstration of the framework. Future studies should evaluate preservice and in-service teachers' conceptualization of culture and their understanding of how existing systems perpetuate discriminatory practices. Additionally, attention should shift from the explicit tenets to the recursive nature of the framework identifying how teacher beliefs change over time and how these changes inform their practices.

Concluding Thoughts

We have presented this alternate view of CRCM believing its usefulness is related to how individuals interact with its tenets. we expect teachers to create class environments that support the cultural differences of students, academics and practitioners must reflect on their own beliefs and assumptions of CRCM in conjunction with the realities of our education landscape.
For academics, this necessitates a change in the way we evaluate and analyze the framework's usage. Simply focusing on the explicit components of CRCM (i.e., praxis and environment) has yet to yield actual change. Thus, rigorous research must include identifying how teachers identify biases, the way they view cultural differences, and how they interact with existing and changing systems. For practitioners, normalizing the conversation around the *self*, *other*, and *context* will require financial and

logistical expenditures. Without dedicating the time and resources to these difficult conversations, teachers will continue using strategies and creating environments that are superficially tied to cultural competence.

In closing, we hope to begin a dialogue that extends Weinstein et al.'s (2003) groundbreaking framework into an increasingly diverse and changing America. We hope our alternate understanding of CRCM will expand the discussion and will create a larger community dedicated to bolstering teachers in their effort to support our nation's students.

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From Slow Reform to Meaningful Abolition: Exclusionary School Discipline and the Need for a New Paradigm

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From Slow Reform to Meaningful Abolition:
Exclusionary School Discipline and the Need for a New Paradigm

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Abstract

In this essay, we draw on the extant literature to demonstrate the entrenchment of a "reform" paradigm in school discipline policy, research, and practice. We argue that the slow pace of school discipline reform has not served Black children and youth and compels a stronger stance on ending exclusionary discipline once and for all. So long as exclusionary discipline is a viable option for school administrators and teachers, it will be used to the detriment of Black children and youth. What is needed instead is a new paradigm, one focused on the total end, or abolition, of exclusionary practices. Disentangling from current discipline policy and practice will be no small feat and requires legislative changes primarily at the state and federal levels. On the precipice of a return to harsher discipline policies, it is imperative to maintain the progress won in recent years while pushing for the end of exclusionary discipline altogether. Implications of an abolitionist school discipline paradigm in policy, research, and practice are addressed.

Keywords: School Discipline, Black Children, Policy Reform, Abolition

Introduction

As education scholars studying race, school discipline, and education leadership, we have witnessed the reliance of what we call a "reform" paradigm of exclusionary discipline over the past 20 years. This paradigm introduced important changes in many districts, but it has not succeeded in ending the use of exclusionary discipline with Black children and youth. What is needed is a concerted effort to end exclusionary school discipline, both policies permitting it and the practice themselves. In this article, we draw on the extant literature to describe the entrenchment of a school discipline reform paradigm in educational policy, research, and practice. We argue that "slow reform" has not served Black children and youth. So long as exclusionary school discipline continues to be an option for districts and schools, Black children and youth will disproportionately experience its adverse impacts across childhood and into adulthood. Instead, a new paradigm is needed, one focused on the total end of exclusionary discipline – in both policy and practice -- across districts and schools, an abolitionist paradigm that removes the punitive, ineffective, and dehumanizing approaches too long relied upon in public schools. Disentangling from the legal and political school discipline web is no small feat. We conclude with recommendations for ending exclusionary school discipline in state and federal policy.

Exclusionary School Discipline

School discipline policies and practices are "the chosen methods and rules that dictate and govern acceptable student behavior" (Irby & Coney, 2021, p. 502). In this essay, we address *exclusionary* school discipline, which is characterized by (1) a reliance on punishment to coerce behavioral compliance and (2) removes children from the classroom or school, typically via office discipline referrals, in- and out-of-school suspensions, expulsions, and placement into alternative educational

settings (Welsh & Little, 2018a). Each year, millions of children are impacted by exclusionary school discipline. In 2017-2018, 2.5 million children received at least one out-of-school suspensions, 2.6 million children received at least one in-school suspensions, and 101,000 children were expelled (U.S. Department of Education, 2017-2018). The underreporting of school discipline data means that the number of children impacted is likely higher (Losen & Martinez, 2020). Exclusionary school discipline negatively impacts student attendance, student achievement, graduation, and increases contact with the juvenile justice system (for a review see Welsh & Little, 2018b). Plagued with ongoing transparency issues, school administrators use exclusionary discipline in ways that undermine children and parents' rights. Failure to follow procedures in accordance with students' rights of due process have been documented as early as the 1970s and continue today, where parents are not informed or able to appeal school official's decisions (Clarke et al., 1982; Wilkerson, 1975). School officials have been found to neglect due process procedures while depriving children of educational opportunity (Williams et al., 2020). Furthermore, while some may argue that exclusionary discipline is rightly punishment to "fit the crime" the reality is far different. Most disciplinary incidents are quite minor and do not require the heavy-handed response commensurate with suspensions, expulsions, and referrals to law enforcement (Irwin et al., 2023).

Since 1973, widespread evidence has indicated that educators disproportionately use suspension against Black children and youth (Edelman et al., 1975). In 1973, the suspension rate for Black children was 6% percent and for white children was 3%. By 2010, the suspension rate for Black children was 16% compared to just four percent 4% for white children (Leung-Gagné et al., 2022). Though suspension rates for white children peaked in the late 1990s, the rate at which Black children were suspended continued to increase until 2009-2010 (Leung-Gagné et al., 2022). Across the decades, research continues to find that Black children are more often punished for minor incidents, and punished more harshly for the same or similar incidents as white children, despite that misconduct, or attitudes toward it, are not greater among Black children compared to white children (Anyon et al., 2014; Huang, 2018, 2020; McFadden at al., 1992; Shaw & Braden, 1990; Skiba et al., 2011; Wu et al., 1982). Black children have been penalized minor and subjective behaviors that are either similar or less egregious than those of their white peers (Pernell, 1990; Skiba et al., 2002). The reform paradigm fails to take into account a truth about exclusionary school discipline: as long as it exists, it will be used as a tool of white supremacy harming Black children and youth.

The consequences of suspensions are disastrous for children, who suffer multiple adverse impacts (Morris & Perry, 2016; Noltemeyer et al., 2015; Welsh & Little, 2018b). A detailed analysis by Losen and Martinez (2020) found that during a single school year, 11.4 million days of instructional time were lost due to out-of-school suspensions. This equals 62,000 *years* of lost instruction time - in a single year.Nationally, Nationally, Black children lost 103 days per year compared to white children (21 days).As an example of what this means at a district level, consider the following: In one school year, in New York City Schools, the rate of lost instruction due to suspension for all children was 23 days, but when disaggregated by race, the rate was 54 days for Black children compared to 7 days for white children.

Given that the same children can be, and are, suspended multiple times, 11.4 million days of lost instruction underestimates the real impact of learning time loss due to suspensions. Furthermore, this number excludes a range of in-school exclusionary discipline strategies such as classroom removals and in-school detentions, nor "soft" – or informal – out-of-school suspensions (Williford et al., 2021; Wiley et al. 2020; Wiley et al., 2023). In short, even this shocking number likely undercounts the costs of exclusion on academic instruction. With the significance of lost

instructional time, it is not surprising that suspension contributes to students' poor academic achievement, student drop-out, increased contact with the juvenile justice system (Welsh & Little, 2018b). These impacts reverberate across the life course, with implications for future professional, economic, and later life outcomes. Through the denial of instructional time and related adverse impacts on student achievement and life outcomes, out-of-school suspension constitutes not just a singular event in a child's trajectory but rather longitudinally constitutes a form of dispossession.

The Historical Rise of Racialized Mass Exclusion

Scholars commonly attribute the rise of exclusionary discipline and racial disparities to the zero-tolerance era, a time period that spanned the late 1980s, 1990s, and early 2000s (Irby & Coney, 2021; Wiley & Middleton, in-press). National policy decisions during that time increased the use of suspensions and expulsions across public schools. One of those was the 1994 Guns Free Schools Act (GFSA), which required states receiving federal funding to (1) expel any student for at least one year for bringing a firearm into school and (2) to involve law enforcement as a first responder to varying student infractions. In 1995, the GFSA was modified to replace "firearm" with "weapon," and amended in 1997 to include drug offenses, thus expanding zero tolerance policies to include infractions beyond firearms to weapons and drugs more broadly (Irby & Coney, 2021). By 2000, most school districts had adopted zero-tolerance policies to comply with the GFSA (Irby & Coney, 2021; Leung-Gagné et al., 2022). The use of out-of-school suspension greatly expanded under these policies. Between 1973 and 2009 the national suspension rate rose from 4% to 7%, with particularly high increases during the 1980s and 1990s (Leung-Gagné et al., 2022). These aggregate numbers belie extensive racial differences: during that same time, the suspension rate for Black children rose from 6% in 1973 to 16% in 2009 while the rate for white children rose from 3% to 5% (Leung-Gagné et al., 2022).

While many attribute the zero-tolerance era to the origins of over-disciplining of Black children), the use of exclusionary discipline, its discriminatory impact on Black children, and the relationship between discipline to the carceral system began earlier (Williams, 2024). School administrators' use of suspension and expulsion increased dramatically in response to school desegregation (Chin, 2021). Suspension rates in southern – and northern -- desegregating districts increased for both Black children and white children, but at much higher rates for Black children. Having lost the legal battle against desegregation, white officials relied on exclusionary school discipline to resist integration of Black and white children and to undermine Black educational opportunity (Edelman, et al., 1975; Eitle & Eitle, 2004; Thornton & Trent, 1989; Eyler, 1982). Today, the highest Black-white racial discipline disparities are seen in districts where white resistance to school desegregation was historically the strongest (Kupchik & Henry, 2022). Given this history, some have conceptualized exclusionary discipline as *the afterlife of segregation* (ross, 2020). Even prior to *Brown*, early 20th century public schools forcibly excluded Black children from public education, rather ironically,, utilizing enforcement of compulsory education laws (Agyepong, 2018). As this history makes evident, the over-disciplining of Black children today is a long-standing form of racial discrimination in public education, one that education advocates, policymakers, and researchers have diligently tried to change for the last 75 years.

The Reform Paradigm

Over the last twenty years a *reformist paradigm* to addressing exclusionary school discipline -- understood as a general approach to policy and practice emphasizing incremental change within

existing structures (Davis, 2003; Kaba, 2021; Kingdon, 1984; Love, 2023) -- has been evident in both education policy and research. We argue the reformist paradigm has incrementally changed discipline policy and practice without fundamentally transforming the widespread use of exclusionary discipline in public schools, particularly for Black children and youth. In the next section, we explain this argument in more detail by describing recent reforms and the failure to end racial disparities for Black children. Then, we argue for the need to end exclusionary discipline, in policy and practice, rooting this paradigm in a tradition of abolitionist scholars (Davis, 2003; Kaba, 2021; Love, 2023).

Recent School Discipline Policy Reforms

Since the 1970s,concerted efforts have fought to end what have been called the "school-to-jailhouse track" and "the school-to-prison pipeline" (Edelman, et al., 1975; Losen & Wald, 2003; Warren, 2023). This social movement has been driven by organizers, advocates, researchers, and policymakers. In just the last 20 years, Black and Latino community organizers across the country in districts including Chicago, Illinois, Denver, Colorado, Oakland, California, and Holmes County, Mississippi -- districts serving high numbers of Black and Latino children and with long histories of community organizing against racial oppression –won changes to school discipline conduct codes and state discipline policy (Anyon et al., 2019; Warren, 2023). Action at the local level also spurred action on the federal level: when, in 2011, the Obama Administration launched the Supportive School Discipline Initiative, a comprehensive effort to address widespread use of exclusionary discipline and to reduce its impact on students of color and students with disabilities. Then, in 2014, the U.S. Departments of Education and Justice released guidance that sent a reminder to states and LEAs regarding districts' non-discrimination obligations under federal law and encouraging districts to reduce the use of exclusionary discipline and to incorporate alternatives such as positive behavioral supports and restorative practices (U.S. Dept. of Justice and Education, 2014).

The combination of grassroots community organizing and prioritization at the federal level prompted dozens of states to pass new legislation aimed at reforming discipline policy (Mediratta, 2012; Ritter, 2018; Warren, 2022). At the state level, in 2008, for the first time, the number of legislative bills proposed restricting the use of suspension and expulsion surpassed the number of those that expanded their use (Education Commission of the States, 2019). This trend continued, and between 2013-2018, 36 state bills *restricted* suspension and expulsion (or encouraged non-exclusionary alternatives), while fewer than 10 state bills sought to *expand* their use (Education Commission of the States, 2019). Most bills restricted the use of suspensions or expulsions under certain conditions, such as restricting suspension and expulsion for children in early grades (e.g., pre-K-3), limiting the length of time a child could be suspended or expelled, while other bills expanded data reporting requirements (Education Commission of the States, 2017). By 2019, 16 states and the District of Columbia limited suspension in certain grades, and 17 states and the District of Columbia outright prohibited suspension for truancy.

In addition to state changes, numerous districts changed discipline policy, sometimes preceding or following state changes. In some districts, reform efforts focused on reducing suspension and reducing or eliminating racial disparities. For example, Denver Public Schools, whose district-level reform resulted from a multi-year campaign by community and youth organizers, and preceded changes at state level, sought to reduce out-of-school suspension and expulsion and to eliminate racial disparities (Anyon et al., 2018). Other districts ended suspension for certain infraction types, including Los Angeles and Philadelphia, which both prohibited suspension for certain forms of

minor misconduct (Hashim et al., 2018; Ritter, 2018; Steinberg & Lacoe, 2017). While part of the reform movement has focused on legislation restricting suspension and expulsion under certain conditions, another part of the policy reform movement has focused on legislation that addressed "non exclusionary alternatives" (e.g., restorative justice, multi-tiered systems of support).

As of 2021, 37 states and the District of Columbia included "alternative" disciplinary practices in state statutes or regulations and included community service, conflict resolution, counseling, peer mediation, positive behavioral interventions, restitution and restorative justice (Education Commission of the States, 2021). The reform movement's legislative efforts won "soft" language, that is, language that does *not mandate* or *require*, but instead "encourages" districts to use non-exclusionary alternatives. For example, a Florida state statute reads "schools are *encouraged* to use alternatives to expulsion by addressing behavior through restitution..." Similarly, in Colorado, school districts are "*encouraged* to consider whether a lesser intervention would properly address the violation committed by the student." And in Texas, similarly tepid language states that "districts *may develop* positive behavior programs that provide alternatives to discipline for children below grade 3."

On the one hand, such changes, even tepid as they might be, may reflect progress on restricting the use of exclusionary discipline, particularly suspension and expulsion and promoting non-exclusionary alternatives. These changes may be further seen as an encouraging sign that, gradually, and state-by-state, lawmakers are becoming more amenable to progressive positions on school discipline. However, this position overlooks that exclusionary discipline is still a readily available policy option, as many states still either require or permit the use of it under specific instances and even allow for it under minor and subjective categories. Though most people commonly believe that suspension is used for egregious misconduct, states still permit suspension for a variety of minor issues. As of 2021, 32 states *still* permit suspension and expulsion for "defiant or disruptive behavior" even though research has found this category prone to racial bias particularly impacting Black children (Education Commission of the States, 2019; Skiba et al., 2002, 2011). While reforms have occurred in many states and districts, out-of-school suspension and expulsion – as well as other forms of exclusionary discipline – remain widely available.

Education Research and Reform Efforts

Research on exclusionary school discipline has an equally long history running parallel to, and intersecting with, the social movement against the school-to-prison pipeline. Early research in 1974 and 1975 by the Children's Defense Fund revealed extensive over-disciplining of Black children (Edelman et al., 1974, 1975). These reports challenged dominant narratives at the time which characterized children's misbehavior as a problem of children themselves rather than a consequence of unequal education institutions and racial discrimination. In particular, the 1975 report was central to showing that Black children were punished disproportionality and for minor and subjective reasons. A sizable number of research studies followed, often focused on Black boys (Noguera, 2003; Strauss & Stewart, 1999) and increasingly has focused on the particular vulnerability of Black girls to harsh discipline (Blake et al., 2011; Hines-Datiri & Carter Andrews, 2020). On this, it's important to recognize that the lag time between research examining the impacts of exclusionary discipline by gender, and other intersections (special education, LGBTQ status, culture, language, gifted and talented), highlights a dichotomous approach to reform that is abetted by research; an emphasis often occurs either on one marginalized group at a time, or none at all. Often, as researchers begin to capture the extent of reform efforts on exclusionary outcomes for one group (i.e., Black boys in middle school), the dissemination of those findings do not account for the

collateral damage caused by the reform efforts on other marginalized groups. This dichotomy often undercuts intersectional investigations and remedies, as it relates to who should be served first by school discipline reform remains ever present throughout numerous social constructs and learner categories We are not suggesting that groups should be excluded from research that illuminates discriminatory practices, rather, a significant short-coming of reform efforts is the prioritization of select groups while sacrificing other groups which could be just as disenfranchised by school discipline outcomes, and identifying and remedying the impacts of discipline on those marginalized at multiple intersections (for example, Black children with disabilities are often suspended the most) we believe will improve systems and outcomes for children on the whole .

As researchers uncovered just how ineffective punitive school discipline approaches were for children (especially Black children), the attempts to reform such measures typically addressed school approaches or district/state approaches. A segment of research concerning reforms at the school level often highlight the various factors that require reconfiguring, but which may overlook that exclusionary outcomes are a feature of a school's adherence to an explicit or implicit punitive model, rather than an outlier to it. Numerous studies place a heavy emphasis on teacher preparation and the role that classroom management and instruction have on reducing office referrals, which further lead to suspensions (Kwok, 2017; Williams, 2022;). Still, efforts to reform teacher practices and teacher preparation have been short-sighted: if these reforms are not combined with a focus on addressing the dispositions/ideologies that teachers hold towards children who are not from their cultural, racial, linguistic or socioeconomic background, the avenues through which bias moves remain uninterrupted. Furthermore, as school leaders have attempted to provide more responsive approaches to school discipline for all teachers, their short-term and long-term efforts are often mitigated by just a few teachers that maintain the belief that punitive approaches are more effective (cite?). Just a small number of teachers can produce large racial discipline gaps. Liu et al. (2023) found that 5% of the teachers were responsible for doubling the racial gap between Black children and white children with regard to office referrals. When allowed the option (such as an office referral), some teachers will lean heavily on this option despite the ability to exhaust all other options before removing a student from class.

Another school-level effort within the reform movement has sought to establish congruence between the ethno/racial identity of teachers and children. The overwhelming majority of teachers are middle class white women, whereas the majority of schools in the U.S. educate children who do not look like the instructor at the front of the room. While a segment of research has pushed for the diversification of the teacher workforce as one approach to reducing disciplinary outcomes for marginalized children (Shirrell et al., 2023), simply placing Black teachers, regardless of their dispositions towards Black children, will not fully ameliorate the rate at which exclusionary practices are levied (Williams et al., 2020). Racial congruence between teachers and children in the classroom is yet one of many approaches to reducing the use of exclusionary practices.

Importantly, focusing on racial congruence alone does not acknowledge the disciplinary options that teachers (regardless of their race or ethnicity) have at their disposal may be circumscribed and may still promote exclusion. For example, studies in the last few decades have focused on exemplary school discipline models as silver bullets for exclusionary practices. Positive Behavioral Interventions and Systems (PBIS) and restorative practices or restorative justice models have emerged as potential ways to reduce exclusionary discipline. Regularly, research has highlighted specific cases of their effectiveness, but concerns remain of their limited capability to eliminate disparities due to uneven implementation and the continual availability of exclusionary discipline

options (Davis, 2017; Tyre & Feuerborn, 2021). Additionally, when those models are utilized for school discipline reform, rarely is a full account provided of implementation fidelity, the way punitive disciplinary options were utilized, the role of teacher, administrator, district staff turnover, or the role of specialized funding sources in implementation. Thus, what researchers have presented are snapshots of reforms that do not provide a full account of the sustainability of those models amidst social, political, and economic changes that occur yearly within schools.

And, research on reform has indicated that schools, and the educators that work within them, do not operate in isolation. Rather, their ability to make changes is predicated on various factors deriving from their local education agency (i.e., school district). When analyzing reform efforts at the district level, studies have found that people and institutions with more administrative power (area superintendents, school board members, state governing boards of education) dictated if and how school discipline reform occurred (Curran & Finch, 2021; Welsh, 2023; Williams et al., 2020). For example, Williams et al. (2020) explored the experiences of assistant principals as disciplinarians at two middle schools. Whereas one middle school found support from area leadership to utilize less punitive approaches to correct behavior, the other struggled to transition away from suspending children. The rationale as three of the assistant principals indicated was due to district leadership "cracking down" on misbehavior, when previous limited attempts to use less punitive practices did not reduce the number of office referrals in the previous academic year. Similarly, Williams et al. (2020), found that within the same district, school administrators made sense of and differently utilized the newly reformed district conduct code. Whereas several schools took a proactive approach and discouraged exclusionary discipline other schools in the same district used a punitive approach reliant on exclusionary discipline. What can be gleaned from these studies about reform is that the localized preferences and philosophical approaches of school and district officials can undermine reform efforts.

Reform is never conducted on a blank canvas and approaches to altering how school discipline is applied are always undergirded by the reality of punitive options remaining a "last resort" in many district and state policies. The premise is undergirded by the idea that without exclusionary punishment, children will not get the "lesson" and reform their habits. What this premise ignores is that exclusionary discipline practices, in and of themselves, are detrimental and do not unequivocally translate into better behavior by children. Creating and sustaining an artificial threshold of acceptable removals via punitive practices undermines any likelihood of "reform" being successful for all children.

Relatedly, the reform movement has been undergirded by a discourse regarding acceptable losses as it relates to school discipline. That is to say, regardless of what type of program, approach, policy change, or pedagogical alteration, there will always be a segment of the student population (i.e., a few bad apples in a barrel) who's actions will warrant their swift and decisive removal from schools. The problematic nature of tolerating a small percentage of "acceptable" loss is that a what counts as "small" is subjective and negotiable. Research has indicated that, on an ideological level, punitive practices are acceptable among school leaders as long as they are seen as (1) pertaining to safety and order in schools, and more often than not, and (2) when this "small" percentage of students consists of Black children (Wiley, 2021). The well-being of Black children is often minimized under the guise of securing the school building, keeping faculty 'safe', or preserving the "right to learn" for those children deemed worthy (Wiley, 2021). Creating and sustaining an artificial threshold of acceptable removals via punitive practices undermines any likelihood of "reform" being successful for all children because educators can always rationalize the use of punishment. When behaviors are

classified as disruptive towards the safety and security of those in the building, learning opportunities, or teachers' instructional practices, the removal of the student, regardless of the outcome, is considered justifiable – and remains a normative feature of reform.

Thisthis logic overlooks numerous findings on the misapplication of school discipline and glosses over a critical proposition: maybe the barrel (education system) was rotten from the beginning. Instead of rationalizing that there will always be a few bad apples, the more responsive approach needs incentivize to extend towards institutionalizing that the philosophy that there are *no acceptable forms of exclusion* towards children because there are simply no such thing as bad apple children, and as educators we do noteducators give up on children and youth. A change also requires a shift from *blaming children* to holding institutions and systems responsible for exclusion. Yet, to cultivate and maintain this disciplinary approach requires educators, educational leaders, and policy makers to hold to the idea that no level of loss or "collateral damage" is acceptable, especially in an industry that values the lives of those it serves (Perry & Morris, 2014; Jabbari & Johnson, 2020; Mowen, 2017).

The "Wins" of Slow Reform Continue to Fail Black Children

Have Black children and youth been well served by school discipline reforms over the last twenty years? We would argue no. Black children and youth remain nearly as vulnerable today to suspension and other forms of exclusionary discipline as fifty years ago. Several examples highlight the failure of reforms to fundamentally end the over disciplining of Black children and also showcase that the impacts of reform on Black children often are considered secondarily to reductions in suspension rates alone. Baker-Smith (2018) studied New York City's 2012-2013 removal of suspensions for low-level infractions and found that suspension rates did decrease overall from 7% to 5.8%. Rates differences were slight for Black children and the gap between Black and white children remained large. Suspension rates for Black boys decreased from 14.7% to 12.8% and for Black girls from 10.5% to 9.4%. Suspension rates for white boys decreased from 5.2% to 4.0% and for white girls from 2.4% to 1.6%. Baker-Smith found that despite reductions in first-time suspensions, children in all groups were more likely to be suspended a second time once an initial suspension had been assigned, and that this was highest for Black boys. Overall, Baker-Smith concluded that the district's policy change met its intended goal of reducing the use of suspensions overall, but that despite small changes in suspension rates by race, large existing differences in racial disparities went unchanged.

Similarly, Anyon et al. (2014) studied the effects of discipline policy reform in a large urban district where in 2008 the district reformed its discipline policy to reduce the use of suspensions, implement restorative justice and therapeutic alternatives, and to eliminate racial disparities. The district reform was associated with a 40% reduction in suspension and expulsion rates. The percentage of Black children suspended, and white children suspended decreased by 1% over four school years for each group: Black children from 13% to 12% and white children from 4% to 3% (Anyon et al., 2014, p. 382). However, as those numbers made evident, the difference in suspension rates between Black and white children was nowhere near eliminated four years into the reform and Black children still had higher odds of suspension after controlling for a variety of student-level factors. In a later study.Anyon et al. (2016) similarly found that while reform had some positive impacts, the Black-white suspension gap persisted, indicating that Black children and youth were not wholly served by the district's reform efforts.

Hashim et al. (2018) studied the effects of Los Angeles Unified District's discipline reform, which placed a ban on suspensions and, like Denver, required the implementation of restorative justice. Like Anyon et al. (2014), Hashim et al. found a large decline in suspensions following the reform, but, also like Anyon et al. (2014, 2016), differences remained between the rates at which Black and non-Black children were disciplined. Similarly, in 2013, the School District of Philadelphia reformed its conduct code to prohibit suspension for two types of infractions (1) failing to follow classroom rules and disruption and (2) using profane or obscene language or gestures (Steinberg & Lacoe, 2017). In the year following the change, the number of overall suspensions and days of suspension for Black children increased and while suspension disparities were reduced in the reform-targeted category, suspensions grew on the whole. Switching from district to state-level, Anderson (2018) examined Arkansas' 2013 new state law prohibiting suspensions for truancy and found that three years into the reform school administrators were still applying suspension as a disciplinary consequence for truancy. Furthermore, schools with higher proportions of Black children were less likely to comply with the policy, meaning that schools with more Black children continued to suspend children (and, likely Black children) for truancy despite it being prohibited by state law.

These studies suggest that reforms, particularly those imposing limits on suspension in a piece-meal fashion, may generate a decline in overall rates of suspension but do not change the greater likelihood of punishment for Black children and youth. Additionally, the reform literature speaks to the "wins" of reductions in suspensions, but as Black children and youth continue to experience the greatest rates of vulnerability to punishment in schools, the primary measure of discipline reform's success should be its impact on Black children, rather than reserving this as a secondary indicator. Even with these studies in mind, findings from individual districts do not convey the magnitude of the continuing suspension problem for Black children and youth in the U.S. In 2017-2018, the most recent year of reliable Office for Civil Rights prior to COVID-19, of 7.6 million Black children in public schools, nearly 2 million received one or more in or out-of-school suspension and 40,000 Black children were expelled from public schools in one school year. The national reform movement with its frequent district-by-district piecemeal approach has failed to end the nearly 50-year trend of administrator pushout of Black children vis-á-vi exclusionary school discipline.

It's Time to Abolish Exclusionary School Discipline

Fifty years ago, civil rights leader and child advocate Marian Wright Edelman challenged the public to fundamentally question the utility of exclusionary school discipline, stating, "children are thrown out of school for a vast array of offenses…with so little consideration for their personal and educational interests as to call into question the underlying validity of suspension as a school policy" (Edelman et al., 1974, p. 118). The utility of suspension as an effectivepolicy for improving achievement or improving school safety remains unsubstantiated. Since Edelman's writing, educators have continued to use suspension and other forms of exclusionary discipline across roughly four generations, arguably adversely impacting not only Black children and youth but deepening parental mistrust of schools and districts. Now is the time to abolish suspension and other forms of exclusionary school discipline. *Abolish* means to "formally put to an end" (New Oxford American Dictionary, 2023). In the racialized context of the U.S. *abolition* has referred to the movement to end enslavement of Africans and people of African descent and the movement to end the prison system and the school-to-prison pipeline, all systems of which have been central to the maintenance of white supremacy (Davis, 2003; Kaba, 2021; Love, 2023). We join others in calling for the abolishment of exclusionary discipline (Kaba, 2021; Love, 2023), and specifically for the end of out-of-school suspension and other forms of exclusionary discipline in both *policy and practice*,

including in-and-out of school suspension, expulsion, seclusion rooms, and alternative schools for disciplined children and youth. To cultivate and sustain the well-being of Black children and youth in education, it is imperative that models to end exclusionary discipline are grounded in abolitionist practices rather than simply reform. Reform centralizes a notion that there are core aspects within the practice, policies or procedures that are worth saving, yet only require new ideas and innovations to make these aspects worthwhile in today's world. If we are striving for school discipline models that support Black children's growth as exemplar, simply reforming antiquated models that were based on racialized forms of school punishment will only reduce inequitable treatment rather than eliminate them.

Ending exclusionary discipline would require, namely, changes in state and federal law and regulation, as the over disciplining of Black children and youth is too serious an issue to be left to the decision-making of individual school districts. What is needed is a national agenda for dismantling exclusionary school discipline, "rather than by district or school" (Irby & Coney, 2021, p. 504). District-specific initiatives, while well intended, have not been able to eradicate administrators over reliance of exclusionary discipline (Anyon et al., 2016; Hashim et al., 2018). This is not to say there have not been successes; however, the historical, ongoing macro-level issues cannot be addressed on a district-by-district basis, reliant upon the political whims of boards of education and variable enforcement among federal administrations. Disentangling from the legal and political web thus far will be no small feat and requires political leadership and legislative changes primarily at the state and the federal level. That numerous states and districts have placed restrictions on exclusionary discipline demonstrates the impact that a movement can have on discipline policy and should be seen as encouraging the next legislative step: fully removing exclusion discipline from state and district statutes and regulations. As states have a primary responsibility for ensuring educational opportunity, states have a significant role to play in ending exclusionary discipline.

Approximately 32 states and the District of Columbia still allow suspension and expulsion. Just as state legislatures have demonstrated the ability to modify discipline laws to reflect prohibitions on suspension and expulsions in select instances, states should take the next step to completely prohibit the use of suspension and expulsion for any offense Pre-K-12th grade. As has been advocated by others, state laws need to remove suspension and expulsion as an option (Justin, 2021). Such action is necessary to alter the current power dynamic that "leaves children vulnerable to excessive punishment" (Bell, p. 133). This position may sound extreme; one that would leave schools vulnerable to serious misconduct. Yet most suspensions, however, are actually assigned for minor reasons. Nationally, and up until the pandemic, issues such as insubordination accounted for a larger share of suspensions and expulsions over time, while the proportion of serious misconduct (weapons, drugs) has declined during the same period in suspension and expulsions restrictions have been enacted (Steinberg & Lacoe, 2017b). Recent news headlines would suggest that schools across the country are facing a post-pandemic student behavior crisis (e.g., Jimenez, 2023). Indeed, minor conflict related to bullying and children and classroom "disorder" is reportedly higher than in recent years (NCES, 2021). Overall, though, serious disciplinary incidents at school remain lower than 10 years ago and a high proportion of educators see student behavior as relatively similar or only slightly worse than in previous years (Irwin, 2023). The occurrence of conflict in some schools and districts should not distract from the overall trend of schools as places where disciplinary incidents and serious crime remain relatively low.

But to debate exclusionary discipline in relation to the occurrence of conflict in schools is to, again, engage in a line of thinking that under certain conditions, namely egregious incidents, exclusionary

discipline is warranted. Exclusionary discipline should not be justified on the severity of an incident, however. Decades of research yield no evidence of its efficacy for resolving conflict or violence in schools. Instead, we have had good evidence for at least 20 years that conflict and violence reduction programs work (Voight & Nation, 2016). There have been and continue to be better alternatives for preventing, responding to, and resolving conflict in schools. Enumerated in countless reports, toolkits, and memos, these alternatives should become not the optional or encouraged response, but the only response available to administrators and educators. As such, state law must include mandatory language that requires the use of current alternatives and states must create long-term funding sources to train school staff on current alternatives, because abolishing exclusionary discipline is best supported by adding to and deepening educators' toolkits for conflict prevention and resolution (Justin, 2021). Aligned with this, action is needed at the federal level to eliminate the Guns Free Schools Act [GFSA] and to use federal authority to mandate and fund educational programs that prevent school violence and that support educational well-being. As Coney & Irby write, "mandating such interventions is critical..." (p. 505).

Federal and state action could work in complementary ways to support not only disciplinary alternatives to exclusion but to close school resource inequities, training and professional development, and staffing shortages that further contribute to challenging school climates through ample and long-term grant funding sources. This is consistent with what public school leaders are saying schools need (NCES, 2022). The measure of positive change in ending exclusionary discipline must be indicated by the well-being of Black children, youth, and parents and in criteria established by Black children and families. By definition, abolition seeks to end the use of specific practices but it is also a prospective promotion of building up social institutions and systems that render punishment unnecessary (McLeod, 2015, p. 1172). The school-based contributors to the over disciplining of Black children and youth can be redressed. To do so, federal and state legislation should allocate long-term funding for expanding pathways for Black teachers and principals, curriculum design and implementation centered on Black history and African American studies, and state-university-district partnerships with Historically Black Colleges and Universities.

Should states or federal law prohibit exclusionary discipline is not to suggest that the elimination of suspension will fully end its use in actuality, at least initially. In districts that have eliminated suspensions, they continue to persist. In Arkansas, truancy suspensions continued, even three years after a reform to end them (Anderson, 2018). In New York City, despite reducing suspensions, they saw an increased likelihood that first-time suspended children would be suspended again (Baker Smith, 2018). In Philadelphia, schools continued to use suspension for low-level misconduct despite prohibitions (Steinberg & Lacoe, 2017), and in Los Angeles, overall suspensions declined in the first two years following but began to tick upward in year three (Hasim et al., 2018). Even if states were to prohibit exclusionary discipline, state and federal data reporting on exclusionary indicators should be maintained to allow for civil rights monitoring and targeted district interventions. Standardized indicators should be added that allow for districts and schools to show progress on non-exclusionary discipline measures, indicators which are regularly publicly available in formats linked by student demographic information, infraction type, and administrative response and whose review is supported through convenings of statewide civil rights, education, and child development coalitions.

Resurging Pushout Policies

As we write this, changes at the federal level are likely to make it even more important that states and localities act to maintain wins to reduce exclusionary discipline and to advance it wherever possible. Recently, though, a number of states have sought to make it easier to suspend and expel children. In Arizona, the state made it easier to suspend kindergarteners after eliminating previously imposed restrictions on kindergarten suspension made during an earlier reform cycle (Arizona General Assembly). Kentucky also amended state discipline law to make it easier to suspend children and authorizes suspension as a consequence to three classroom removals. It further permits the suspension of children for incidents that occur off school grounds (Kentucky General Assembly). In West Virginia, an amendment to the state discipline law made it easier to remove children from class for subjective reasons including "interfering in the educational process" and "obstructing a teacher" (Adams, 2023). Children who are removed from class three times in one semester are then suspended from school. Nevada reduced the permissible age of suspension from children of eleven years in age to six years in age (Davis, 2023). Nevada also removed a 2019 requirement for schools to provide children a restorative justice plan prior to removing them from a classroom or school. Like Arizona, Nevada's requirement had been put in place during an earlier era of school discipline reform. And in Florida, where teachers already maintained the right to temporarily and/or permanently remove children from class, the state passed the "Teachers Bill of Rights" which adds the presumption that removing a child for disciplinary reasons is necessary to maintain classroom safety (Turbeville, 2023). It is anticipated that more states will pursue legislation making it easier to remove children from class and suspend and expel children in 2024 (Povich, 2023).

Conclusion

Over fifty decades of research, reports, and advocacy illuminate the need to abolish the way we approach the execution of policies, procedures, and rules regarding student behavior as it intersects race, and cultural expectations. In our attempt to address school discipline outcomes, reducing those outcomes for Black children and those who are the most disadvantaged, the concept of removing children from classrooms has not fully exited the school discipline lexicon. Essentially, the reduction in the number of suspensions still does not fully justify the harmful treatment of the Black children who are still being suspended by a patchworked system that prefers sentencing instead of disciplining children through an affirming pedagogical approach. The adverse outcomes from being removed from the classroom offers an experience for Black children that is void of educational growth and mastery. Thus, one less suspension, numerically, ignores the quality of the experience when Black children remain exposed to a school punishment system built on the universal denial of their educational rights.

Exclusionary school discipline does not need a reform or a reimagining, as its conceptualization and operationalization was never fully defined or imagined in an apparatus absent of the racialized history that is ingrained in the U.S. and its citizens – whether knowingly or unknowingly. To enact school discipline from an abolitionist framework requires instilling approaches that recognize potential harms and centralize holistic practices that have consistently, with fidelity, returned children to the classroom with a stronger understanding of why certain behaviors are inappropriate in the classroom. Secondarily, in formalizing policies at multiple levels (national, state, district and school) there must be a concerted attempt to seek input from those who are typically excluded from previous reform attempts – Black children. What does policy creation in the area of school discipline look like when Black children are at the proverbial table? What other alternative disciplinary

responses can policymakers provide districts while simultaneously offering guaranteed funding and resources to support training educators to use these responses? These questions can be answered when we as researchers demand the complete removal of suspensions as a viable option to reprimand misbehavior. Harkening to the originators of abolitionist work, enslaved Africans, the abolishment of out- of- school suspensions will require researchers to listen and observe schools and other learning environments (e.g., after-school programs, community programs) to glean what can be effectively implemented in schools. While we cannot explicate the entirety of necessary legal and regulatory requirements to end exclusionary discipline, we hope this essay encourages others to join us in developing a local, state, and federal framework for abolishing exclusionary discipline policies and practices and engaging in community building among scholars, educators, advocates, and policymakers around such efforts in coming legislative sessions.

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