Texas Education Review

SPECIAL ISSUE

Democracy Dismantled: Takeover and the Lived Experience of State-Directed Urban School Reform

Summer/Fall 2026
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TEXAS EDUCATION REVIEW

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Welcome to Volume 14, Issue 1 (Summer/Fall 2026) of the Texas Education Review (TxEd)

We are pleased to announce the publication of Volume 14, Issue 1 of the Texas Education Review, featuring four open call pieces that explore: secondary teacher mobility in Texas (Sanders et al.), the relation between school discipline and depressive symptoms among Latino students (Perryman), the financial impact of attendance-based school funding models (Grano), and the implications of SB 17 on Texas's institutions of higher education (Ramirez et al.).

Additionally, we present a Special Issue titled *Democracy Dismantled: Takeover and the Lived Experience of State-Directed Urban School Reform,* containing five entries and an introductory editorial by our Guest Editors, Daniel I. Dawer and Dr. Maria Benzon.

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.

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Secondary Teacher Mobility in Texas: A Multilevel Multinomial Logistic Regression Analysis Across Grade-Band, Subject Area, School Locale and Teacher Race

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Secondary Teacher Mobility in Texas: A Multilevel Multinomial Logistic Regression Analysis Across Grade-Band, Subject Area, School Locale and Teacher Race

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Abstract

This study examines teacher mobility in Texas, focusing on grade-band, subject, locale, and race, while considering education and experience. Applying Nguyen and Springer's framework to Texas Education Agency data (2017-2019) via multilevel multinomial logistic regression, it reveals key patterns. Black teachers face higher attrition, while Latinx and Asian teachers show greater retention. Early-career teachers are more likely to exit or transfer, highlighting the need for strong induction. High school science teachers and those in rural/urban schools also experience greater mobility risks. These findings enhance understanding of teacher workforce stability by identifying factors influencing mobility and offer implications for improved retention, especially for underrepresented teachers and hard-to-staff areas.

Keywords: Teacher Mobility, Multilevel Multinomial Logistic Regression Analysis

Introduction

Teacher mobility—the movement of teachers within, between, or out of schools—has profound implications for educational quality, school stability, and student achievement (Feng & Sass, 2017; Goldring et al., 2014; Lankford et al., 2002). Teacher attrition rates have increased over time and exceed attrition rates of non-helping professions (e.g., engineering, marketing; Henke et al., 2001; Nguyen & Kremer, 2022). Influences on teacher attrition include lack of administrative support, low compensation, unsafe working conditions, increased workload, and school climate (Garcia & Weiss, 2020; Han & Hur, 2022; Woestman & Wasonga, 2015). The National Education Association, the largest teachers' union of approximately three million educators, reported in 2022 that without appropriate reform actions from elected officials to address working conditions, 55% of their members plan to leave education (National Education Association, 2022). The loss of qualified, talented teachers in schools contributes to increased labor costs for school districts for recruitment and training as well as decreases in student achievement (Han & Hur, 2022; Organisation for Economic Co-operation and Development [OECD], 2020; Schleicher, 2018; Sorensen & Ladd, 2020). The losses of qualified, talented teachers are felt intensely, especially in difficult to fill positions like secondary science and mathematics (Ingersoll & Perda, 2010; Malkus et al., 2015; U.S. Department of Education, 2016; Whitfield et al., 2021) and positions in urban and rural schools (Billingsley & Bettini, 2019; Swain et al., 2019).

Existing research on teacher mobility has primarily focused on generalized factors such as teacher salaries, administrative support, and working conditions (e.g., Haddad et al., 2024; Persson & Dannefjord, 2022; Vagi & Pivovarova, 2017). However, few studies have explored how specific factors, such as grade-band (i.e., middle versus high school), subject area (e.g., STEM versus humanities), or school locale (urban, suburban, rural), intersect with teacher demographics (e.g., race,

educational attainment, and prior years of teaching experience) to influence mobility trends. This gap in the literature is particularly pressing in the state of Texas, where rural schools, high-need urban areas, and secondary education subjects like STEM often face acute teacher shortages (Aragon, 2016; Castro et al., 2018; Ingersoll & May, 2012).

In the United States, teacher attrition and transfers are estimated to account for nearly 16% of teachers annually, with higher rates observed in schools serving marginalized communities and rural areas (Ingersoll et al., 2018). Due to differences in teacher certification, hiring practices, and workforce needs across U.S. states, further analysis of the phenomenon at the state level is necessary (Aragon, 2016; Palermo et al., 2022). In Texas, one of the largest and most diverse U.S. states, teacher mobility is increasing (Sullivan et al., 2017). Teacher mobility in Texas rose 3%, from 19% in 2011-2012 to 22% in 2015-2016 (Sullivan et al., 2017). Teacher mobility in Texas in 2015-2016 exceeded the national average of 16% for that year (National Center for Education Statistics, 2017). To address this gap in the literature, this study seeks to investigate the extent to which secondary Texas teacher mobility is associated with grade-band, subject area, school locale, and teacher race, while accounting for educational degree and years of teaching experience. This research aims to contribute a more nuanced understanding of the structural and demographic dimensions of teacher mobility in Texas by answering the research question: *What is the relative risk of teachers in Texas moving within a school district, across school districts, or no longer teaching accounting for personal and school characteristics as well as school district characteristics?*

Literature Review

Although teacher retention is an endemic issue of national importance (Wiggan et al., 2021; Williams III, Hill-Jackson, et al., 2022) specific factors at the state level are critical to examine due to the nationally decentralized structure of education in the United States (Bleiberg & Kraft, 2022). In Texas, the Texas Education Agency (TEA) governs the state education system; over five million students were enrolled in Texas schools in 2024 (TEA, 2024). To support teacher workforce needs in the state, TEA has released strategic priorities for recruiting and retaining teachers (TEA, 2020). These priorities include the implementation of a Teacher Incentive Allotment to attract, retain, and distribute high performing teachers across Texas schools through financial incentives for top-performing teachers in high-need schools (TEA, 2020). Another strategic priority is the establishment of the Mentor Program Allotment to support new teachers through stipends, scheduled release time, and professional development funding (TEA, 2020). The Grow Your Own (GYO) initiative is aimed at supporting rural and small school districts by providing pathways to certification to local professionals. Despite the strategic priorities, like many states across the United States, Texas faces several significant educational issues that impact teachers. Factors that may influence secondary teacher mobility in Texas include teacher certification and qualifications, the grade band and subject area of the teacher's placement, particular school and district characteristics, and teacher-specific characteristics. Our following discussion of the extant literature parses out the salience of teacher, school, and district factors in relation to teacher mobility.

Teacher Certification and Qualifications

The type of certification and level of education attained by teachers significantly influence their mobility. Probationary and alternatively certified teachers, who often lack the same level of preparation as traditionally certified teachers, are more likely to leave the profession, particularly in high-needs schools (Redding & Nguyen, 2020). This is especially relevant in Texas, where alternative

certification programs are widely used to address teacher shortages (Garcia & Weiss, 2020; Reyes & Alexander, 2017). For example, the GYO programs in rural districts that support school district staff members (e.g., tutors, paraprofessionals) on an expedited certification pathway have mixed results for teacher recruitment and retention (Sims, 2022). Recently, the success of GYO programs in rural Texas school districts has been mediated by the decrease in enrollment of students identified as economically disadvantaged and English Language Learners (Sims, 2022). Teachers with advanced degrees, such as master's or doctorates, often have more career opportunities outside of teaching, thus contributing to attrition (Sorensen & Ladd, 2020). These trends highlight the need to examine how certification pathways and educational qualifications intersect with mobility in Texas's secondary schools.

Grade Band and Subject Area

The experiences of and challenges faced by teachers vary by elementary and secondary grade band as well as by discipline (Hancock & Scherff, 2010; Kirchhoff & Lawrenz, 2011). For instance, traditionally certified secondary teachers take a larger course load that is discipline-specific compared to traditionally certified elementary teachers whose course work often have more hours allocated to pedagogical content knowledge and elementary school internships. The retention rates of elementary teachers on average exceed the retention rates of secondary teachers (Goldring et al., 2014). Ingersoll and Perda's (2010) research emphasize the challenge of staffing science and mathematics positions with approximately 31% of secondary schools reporting difficulty in filling the positions with qualified teachers. In secondary schools, qualified teachers with strong discipline specific knowledge and pedagogy in subjects such as physics have shown substantial value-added gains in student achievement (Henry et al., 2012). Further, a common thread specific to STEM teacher retention is the disparity of income between science and mathematics degree holders in education versus in industry fields (Clewell & Forcier, 2001; Kersaint et al., 2007). Thus, due to these considerations, it is pertinent to examine the influence of grade band and subject area for Texas teachers.

School and District Characteristics

Research in teacher retention has shown variance in teacher shortages across school locale (e.g. rural, suburban, urban), school socioeconomic status, and school racial demographics (Carver-Thomas et al., 2016; Cowan et al., 2016; Craig et al., 2023; Ingersoll, 2008; Jacob, 2007; Minor et al., 2019; Nguyen, 2020). The impact of teacher attrition has a negative effect on student achievement especially on schools classified as high-need—low performing or located in an urban or rural area (Berry et al., 2021; Isenberg et al., 2022; Ronfeldt et al., 2013). While there is considerable research on teacher retention in urban schools, or those with urban characteristics, rural settings have received less attention (Ingersoll & Tran, 2023; Monk, 2007). As such, both locales present important, unique challenges that warrant careful consideration.

Leonardo and Hunter (2007) pose that urban settings are socially and discursively constructed of multiple, contradictory meanings: the deficit, failure focused narrative, the cosmopolitan narrative, and the narrative of authenticity. Walshaw (2011) further extends the depiction of urban, arguing that the construct of urban schooling is situated within institutions, historical moments, and social spaces. As such, Milner (2012) re-frames the construct of urban to include schools not only of spatial adjacency of cities but also schools facing challenges such as access to resources and qualifications of teachers. For instance, findings from Ingersoll (2008) substantiate the inequity of access to qualified teachers, more specifically in STEM. Ingersoll (2008) reports that on average,

schools with high percentages of Black and Latinx students had more than double the percent of out-of-field teachers (over 40%) teaching of mathematics classes compared to schools with low enrollment of students of color (15.5%). 83.7% of Texas' population lives in urban areas (Brannen, 2023). Williams III, James et al. (2022) revisited Milner's (2012) urban typology to examine the changing conditions of five school districts in the southwest region of Texas located in or near Houston. Through the lens of Critical Race Theory and Chicana Feminist conceptual framework of the borderlands, Williams III, James et al. (2022) findings demonstrate that common structural boundaries and alignments within and across school districts are driving forces behind educational inequalities. Moreover, the conditions of Houston, Texas are not an anomaly, but instead consistent with large regions such as New York City (Williams III, James, et al., 2022).

Although rural schools similarly face difficulty with quality teacher retention and high poverty, characteristics such as isolated geographical locations, sparse population, and limited access to professional development pose specific challenges (Bihasa, 2018; Hammer et al., 2005; Kansas Department of Education, 2016; Lazarte-Alcala & Miller, 2018). Further, the impact of teacher attrition in rural schools may be magnified by the prevalence of single-teacher departments (Beesley et al., 2010). Teaching in isolation has shown to have a negative influence on teacher satisfaction, retention, and sense of belonging (Etkina et al., 2015; Ingersoll, 2001; Nehmeh & Kelly, 2018). Comparison studies of rural to urban schools have found that rural teachers are not more likely to attrit (Moore, 2011; Nguyen et al., 2020). Whereas in an ordinary least squares regression analysis of cross-sectional national data, Nguyen (2020) found that in sparsely populated states, novice teachers in rural schools were less likely to continue teaching at their schools than urban and suburban teachers. Further quantitative inquiry in teacher retention and mobility in rural contexts is imperative to examine teacher characteristics' influence in combination with locale.

Teacher Characteristics

Teacher characteristics related to teacher retention include gender, race, and years of experience (Achinstein et al., 2010; Borman & Dowling, 2008). After the 1954 landmark supreme court ruling of *Brown v. Board of Education,* there has been a drastic disproportionate relationship between the race of teachers to the student population following the subsequent dismissal and exclusion of Black teachers (Fenwick, 2022; Hill-Jackson, 2017; Philip & Brown, 2020). In a recent analysis of the Schools and Staffing Survey (SASS), Ingersoll et al. (2019) highlight that the growth rate of Teachers of Color (TOC) entering the teaching profession is doubling that of their White colleagues. However, despite the recent increase in teacher diversity, less than a quarter (19.9%) of the teaching positions are filled by TOC (Ingersoll et al., 2018). Research on teacher retention rates is primarily based on national survey results such as the SASS, which aligns with the empirical study of TOC retention; however, there are mixed findings regarding retention rates of TOC. In a quantitative analysis of the SASS, Ingersoll and Merrill (2017) found that TOC were two to three times more likely than their White peers to teach at a school with a high turnover rate in an urban setting. Some researchers have found that TOC have higher retention rates and are more likely to persist in the teaching profession (Guarino et al., 2006; Ingersoll, 2001; Scott et al., 2023). Findings also support that TOC are more likely to continue working in high-need schools longer than non-Hispanic White teachers (Ingersoll & May, 2012; Zumwalt & Craig, 2005). Scholars have identified the "push out" factors of de-professionalizing and disrespectful working conditions for TOC (e.g. racial discrimination, relegation to serving in disciplinary roles, passed over for promotions) that jeopardize retention.

To further examine the retention and attrition of TOC, contextualizing the phenomena within teacher diversity within school and societal culture as well as systemic barriers is necessary (Carter Andrews et al., 2019). TOC's professional decision making is complicated due to their commitment to not only the profession but also communities of color and students (Gist, 2017). The double bind of persisting in the teacher profession to advocate for educational equity and bearing school and district policies has been shown to stifle TOC (Achinstein & Ogawa, 2011; Machado, 2013; Malcom & Malcom, 2011). It is critical to interrogate, examine, and increase the representation of TOC due to their positive influence for all students (Bond et al., 2015; Carter Andrews et al., 2019; Carver-Thomas, 2018; Woodson, 1937).

Why Texas?

Texas, with over five million K–12 students, is one of the largest and most diverse U.S. states, presenting unique educational challenges in serving its vast, multilingual, and economically varied student population (TEA, 2024; Templeton et al., 2023). The state has long struggled with teacher workforce stability, recently reaching a record 13.4% annual attrition (Landa, 2024). Early-career teachers drive these persistent shortages (Templeton et al., 2023). In response, the TEA has implemented initiatives to improve retention, such as the Teacher Incentive Allotment and Grow Your Own (GYO) programs, aiming to attract and keep high-performing teachers in high-need or rural schools through competitive pay and localized teacher development pathways (TEA, 2020). While these policies signal a strategic commitment, their effectiveness has been mixed. Initial research on the Teacher Incentive Allotment's impact shows inconclusive effects on retention, suggesting other factors like school support and culture remain crucial (Chitwood, 2024). Additionally, GYO programs have yielded only modest gains in staffing rural schools, often contingent on broader community changes (Sims, 2022). However, many districts still resort to hiring underqualified educators to fill vacancies indicating that Texas's teacher retention challenges are far from resolved. As a result, Texas stands out as a crucial case study for national teacher retention and mobility trends, illustrating how a large education system grapples with widespread staffing churn and testing reforms that may inform solutions for schools across the country.

Conceptual Framework

Research in teacher mobility analyzes both internal mobility within the teaching profession, or retention, and external mobility to positions outside of teaching (Hughes, 2012). Analyses of teacher mobility include binary outcomes such as continuation in holding a teaching position to multinominal outcomes, such as continuation teaching at the same school, transferring schools, and no longer teaching. When examining teacher mobility, it is important to account for factors such as grade band and subject area but also the racialized dynamics of school and district culture and policy that impact the teachers and students (Hernandez-Johnson et al., 2021).

To account for the complex factors that influence teacher mobility, we utilized Nguyen and Springer's (2023) conceptual framework of teacher turnover. Their synthesis of the literature posits that there are three main correlates (i.e., categories): *external, personal, and school.* External correlates consist of accountability (teacher evaluation, teacher effectiveness, principal effectiveness, and merit pay), workforce (employee hiring rate, late hiring, retention bonus, salary, non-teacher salary, and union), and school improvement (school reform and research and school partnerships). Personal correlates include the subcategories of teacher characteristics (age, sex at birth, race, mental wellness, family situation, etc.) and teacher qualifications (teacher preparation entrance exam scores,

years of experience, credentials, teacher preparation program attended, evaluation ratings, graduate degree attainment, and content specialty). Correlates nested under school are organizational characteristics (size, urbanicity, school type, and grade level), school resources (expenditures, class sizes, teaching materials, and classroom assistants), student body characteristics (student achievement, student demographic percentages, students receiving free or reduced lunch, and students with enhanced support), and relational congruence (race/sex at birth congruence).

Nguyen and Springer (2023) contend that personal and school factors have a direct influence on each other individually, and each are independently associated with the rate in which teachers either exit the classroom or the profession entirely. However, the framework situates external factors as an indirect and direct influence on teacher turnover. First, they conceptualize that external correlates have a direct association with teacher turnover. Secondly, they view external factors as directly influencing personal and school factors, while indirectly influencing teacher turnover via those two factors. Each of the correlates and the corresponding subcategories, according to Nguyen and Springer (2023), are connected to previously established conceptual frameworks or empirically tested models that either influence the rate at which teacher turnover occurs in schools in the U.S. This framework, aligned with existing research on teacher turnover (e.g., Feng & Sass, 2018), identifies specific factors contributing to teacher mobility, offering potential insights to address the alarming national trend of increasing teacher attrition.

Based on the data available to the researchers, we draw on specific subcategories from each of the correlates. Our analysis examined the personal correlates of teacher race, years of teaching experience, and educational degree. This analysis included the school correlates of school locale (i.e., rural, suburban, urban) and grade band (i.e., middle grades 6-8, and high school grades 9-12). Lastly, *external* correlates, accountability (e.g., teacher evaluation policies), workforce (e.g., union), and school improvement, are not included as predictors in our analysis, but instead as context of the study that is nested within Texas.

Method

The purpose of this study is to explore the nuances of secondary teacher mobility by examining the intersections of grade-band, subject area, school locale, and teacher race with teacher mobility, while accounting for educational degree and years of teaching experience through the research question, *What is the relative risk of teachers in Texas moving within a school district, across school districts, or no longer teaching accounting for personal and school characteristics as well as school district characteristics?* To analyze the variability in teacher mobility, we used a multilevel multinomial logistic regression using TEA data. Of note, to account for the nested nature of the data (i.e., teachers within school districts) and to answer the research question that examines the mobility of teachers across school districts, a multilevel approach was warranted. In our multilevel analysis, level one included teacher and school characteristics and level two included district characteristics.

Table 1

Secondary Texas Teacher Demographic Information from 2017-2018 School Year

Factor	Frequency	Percent	*M*	*SD*
Grade-Band				
6–8 [a]	53,893	45.67	0.46	0.50
9–12	64,114	54.33	0.54	0.50
Subject Area				
English Language Arts and Reading [a]	37,560	31.83	0.32	0.47
Mathematics	29,815	25.27	0.25	0.43
Science	24,353	20.64	0.21	0.40
Social Studies	26,279	22.27	0.22	0.42
School Locale				
Rural	36,357	31.37	0.31	0.46
Suburban [a]	34,917	30.13	0.30	0.46
Urban	44,626	38.50	0.39	0.49
Teacher Race				
American Indian/Native Alaskan, Hawaiian/Pacific Islander, or two or more races	2,442	2.07	0.02	0.14
Asian	2,394	2.03	0.02	0.14
Black	13,068	11.07	0.11	0.31
Latinx	25,500	21.61	0.22	0.41
White [a]	74,603	63.22	0.63	0.48
Educational Degree				
Bachelor's [a]	84,319	71.45	0.71	0.45
Doctorate	1,208	1.02	0.01	0.10
Master's	31,326	26.55	0.27	0.44
No Bachelor's Degree or Higher	1,154	0.98	0.01	0.10
Years of Teaching Experience				
0 – 5	46,915	39.76	2.21	1.71
6 – 15 [a]	40, 481	34.30	10.18	2.77
16+	30,611	25.94	23.16	6.31
Mobility				
Not teaching in Texas	17,203	14.58	0.15	0.35
Different district, different school	8,122	6.88	0.07	0.25
Same district, different school	6,657	5.64	0.06	0.23
Same district, same school [a]	86,025	72.90	0.73	0.44

[a] Reflects the reference group.

TEA Data

Two years of comparable data were needed for this study. Data for 2017-2018 and 2018-2019 school years were obtained through a National Science Foundation (NSF) grant that was funded through the American Education Research Association Grants Program. These school years were the most

immediate, full data sets available at the time of data retrieval and analysis pre-COVID-19. We particularly chose these data as a more accurate representation of teacher mobility without the greater influence of a worldwide health pandemic that has impacted teacher mobility in ways that the TEA data does not capture. In all, these data include the records of 118,007 teachers (representing 1,069 school districts and 4,331 schools). The teacher demographics, reported in the 2017-2018 data set, are represented in Table 1. The majority of the teachers in the sample were White (63.22%) and almost evenly split between middle (45.67%) and high school (54.33%). In regard to locale, the distribution of teachers in the sample was relatively even as well (i.e., rural = 31.37%, suburban = 30.13%, and urban = 38.50%). As shown in Table 1, the majority of teachers held bachelor's degrees as their highest degree earned (71.45%).

Dependent Variables

To create the mobility variable, we merged the teacher data from 2017-2018 (see Table 1) with 2018-2019 by teacher to compare the teachers' district and school with their subsequent statuses. The outcome variable, mobility, describes four characteristics of teacher mobility: 1) not teaching in Texas; 2) different district, different school; 3) same district, different school; and 4) same district, same school (Billingsley & Bettini, 2019; Gilmour et al., 2022). The mobility variable was dummy coded. The reference group-same district, same school-consists of teachers with the same district and school ids for both school years. The category of not teaching in Texas consists of teachers from 2017-2018 who were missing in the 2018-2019 data. Due to the limitations of the dataset, we chose this label since we do not have access to exit survey information and do not know if the teachers' intentions were to leave the profession, teach outside of state, or teach outside of K-12 (Gilmour et al., 2022). The outcome of different district, different school includes teachers with new district and school id's in the second year. This category represents teachers who have moved to teach outside of their previous community. The last category of same district, different school consists of teachers who moved schools within district.

Independent Variables

Grade-band, subject area, school locale and teacher race, in addition to educational degree and years of teaching experience, are each categorical variables. For our analysis, we used factor notation in Stata 18.0 for dummy coding. The independent variable grade-band has two categories: 1) 6-8 (middle grades) and 2) 9-12 (high school). The reference group for grade-band is 6-8 (M = 0.46, SD = 0.50). Subject area has four categories: 1) English Language Arts and Reading; 2) mathematics; 3) science; and 4) social studies. The category English Language Arts and Reading is the reference group (M = 0.32, SD = 0.47).

School locale has three categories: 1) rural, 2) suburban, and 3) urban. The locale of rural consists of schools identified as rural and small town. Suburban is comprised of schools with the delegation suburban which includes small, midsize, and large schools. The category urban is comprised of schools with the delegation of city with the indicators small, midsize, and large. Due to the historically strong retention rates of teachers in suburban schools (Ingersoll & Tran, 2023), suburban is the reference group for urbanicity (M = 0.30, SD = 0.46). Race has five categories: 1) American Indian/Native Alaskan, Hawaiian/Pacific Islander, or two or more races; 2) Asian; 3) Black; 4) Latinx; and 5) White, with White as the reference group (M = 0.63, SD = 0.48). Educational degree has four categories, representing the highest degree the teacher had achieved: 1) bachelor's; 2) doctorate; 3) master's; or 4) no bachelor's degree or higher. Given a bachelor's degree is the most

common, it was chosen as the reference group for educational degree (*M* = 0.71, *SD* = 0.45). Finally, years of teaching experience has three categories: 1) 1-5 years; 2) 6-15; or 3) 16+. The reference group is 6-15 years of teaching experience (*M* = 0.34, *SD* = 0.47).

Analysis

For this study, we utilized a multilevel multinomial logistic regression analysis of teacher mobility. This approach is appropriate for nested data with more than two categorical outcomes (Rabe-Hesketh & Skrondal, 2012; Raudenbush & Bryk, 2002). Multilevel multinomial logistic regression analysis can be conceptualized as "simultaneously estimating binary logits for all comparisons among the dependent categories" (Long & Freese, 2001, p. 172). We used Stata 18.0's xtmlogit and mlogit commands paired with the clustering command (i.e., vce(cluster)) and created a two-level model with level one teachers and level two school districts to examine teacher personal correlates and school correlates from Nguyen and Springer's (2023) framework. Guided by O'Connell and McCoach's (2008) recommendations for model building, we first ran the unconditional model and added teacher level one predictors (e.g., subject area, years of teaching experience, race, educational degree), then added school predictors at level one (e.g., grade band, school locale), and then added the interaction of teacher and school predictors at level one. For this analysis, we do not use level two predictors (i.e., school district), but we do account for nesting with the clustering command. All assumptions for a two-level multinomial logistic regression were met (Raudenbush & Bryk, 2002).

The following represents the full, combined model:

$$\log\left[\frac{\varphi_{mij}}{\varphi_{Mij}}\right] = \gamma_{00(m)} + \gamma_{10(m)}(race) + \gamma_{20(m)}(\deg r\, ee) + \gamma_{30(m)}(experience) + \gamma_{40(m)}(subject) + \gamma_{50(m)}(level) + \gamma_{60(m)}(locale) + \gamma_{70(m)}(subjectX\ level) + \gamma_{80(m)}(subject\ X\ locale) + u_{0j(m)}$$

where the outcome at level-one is the log-odds of teacher mobility *m* (i.e., no longer teaching, same district-different school, different district-different school) relative to *M,* teaching at the same school in the same district (Raudenbush & Bryk, 2002). The intercept, $\gamma_{00(m)}$ is the expected log-odds of teacher mobility for English Language Arts and Reading teachers with mid-level (6-15 years of) teaching experience at suburban middle schools who are White. The first predictor, $\gamma_{10(m)}$ teacher race (i.e., American Indian/Native Alaskan, Hawaiian/Pacific Islander, or two or more races; Asian; Black; Latinx), represents the expected change in log-odds of teacher mobility controlling for all other predictors. The next predictor, $\gamma_{20(m)}$ educational degree, represents the expected change in log-odds of teacher mobility for holding a doctorate, masters, or no bachelor's degree or higher. The predictor of teacher experience, $\gamma_{30(m)}$, represents the expected change in log-odds of teacher mobility for teachers with 0-5 years of teaching experience or 16+ years of teaching experience. The predictor subject taught, $\gamma_{40(m)}$, represents the expected change in log-odds for teacher mobility for teaching mathematics, science, or social studies. The predictor level, $\gamma_{50(m)}$, represents the change in log-odds for teaching at high school, and the predictor locale, $\gamma_{60(m)}$, represents the change in log-odds for teaching at a rural or urban school. There are two level-one interaction terms, $\gamma_{70(m)}$ and $\gamma_{80(m)}$, that represent the moderation of school level and locale on the effect of subject area and teacher mobility. The level-two residual, $u_{0j(m)}$ represents the variance across school districts for the log-odds of teacher mobility (Sommet & Morselli, 2017).

Results

Results from the unconditional model (i.e., intercepts only) are included in Table 2. Log-odds and relative risk ratios (RRR) are reported for each teacher mobility outcome. If a RRR is greater than 1, this indicates an increased likelihood of teacher mobility (i.e., no longer teaching in Texas, same district-different school, different district-different school) (Rabe-Hesketh & Skrondal, 2012). Whereas if a RRR is less than 1, this indicates a decreased risk of teacher mobility. Across school districts, there is a statistically significant low risk of teachers leaving teaching (RRR = 0.28, 95%CI [0.23, 0.34]), moving to a different school in another district (RRR = 0.09, 95%CI [0.06, 0.13]), and moving to another school in the same district (RRR = 0.12, 95%CI [0.09, 0.16]).

Table 2

Results from the Unconditional Multilevel Multinomial Logistic Regression Model

Intercept	*B*(Robust *SE*)	*RRR*	95% CI for *RRR* *LL, UL*
Fixed Effects			
Intercept- No Longer Teaching in Texas ($\gamma_{00(1)}$)	-1.29(0.10)***	0.28	0.23, 0.34
Intercept- Different District, Different School ($\gamma_{00(2)}$)	-2.40(0.17)***	0.09	0.06, 0.13
Intercept- Same District, Different School ($\gamma_{00(3)}$)	-2.13(0.06)***	0.12	0.09, 0.16
Random Effects			
Variance across districts – No Longer Teaching in Texas ($\tau_{00(1)}$)	4.11(0.25)		3.66, 4.62
Variance across districts – Different District, Different School ($\tau_{00(2)}$)	4.26(0.26)		3.77, 4.81
Variance across districts – Same District, Different School ($\tau_{00(3)}$)	8.13(0.97)		6.43, 10.28

Note. *p < .05. **p < 0.01. ***p < 0.001.

Results from the conditional model (i.e., full model with predictors) are shown in Tables 3, 4, and 5. Based on the likelihood ratio chi-square test [LR (72) = 2,411.25, $p < 0.001$], the conditional model is a better fit. Further, an improvement in model fit statistics from the unconditional model was demonstrated (AIC = 190974.30, BIC = 191698.80). In the following sections, we discuss the results by outcome.

No Longer Teaching in Texas

The majority of secondary Texas teachers (73%) continued teaching at their same school between the 2017-2018 and 2018-2019 school years, while 15% were not teaching in Texas. There was a statistically significant low relative risk of no longer teaching across districts (RRR = 0.15, 95%CI [0.14, 0.16]) (see Table 3) accounting for all teacher and school factors. Black teachers were at a statistically significant higher risk (RRR = 1.21, 95%CI [1.12, 1.31]) of no longer teaching in Texas while Asian (RRR = 0.87, 95%CI [0.77, 0.97]) and Latinx (RRR = 0.80, 95%CI [0.74, 0.88]) teachers were statistically significantly more likely to continue teaching at the same school. Specifically, there was an estimated 21% increase (i.e., 21% = 100% [1.21 – 1]) in the odds of Black teachers no longer teaching in Texas compared to White teachers. Moreover, the educational degree that teachers held also had a statistically significant effect on the likelihood of no longer teaching in Texas.

Table 3

Multilevel Multinomial Logistic Regression for No Longer Teaching in Texas

Predictor	*B*(Robust *SE*)	*RRR*	95% CI for *RRR* *LL, UL*
Intercept	-1.90(0.05)***	0.15	0.14, 0.16
Teacher Race			
Asian	-0.14(0.06)*	0.87	0.77, 0.97
Black	0.19(0.04)***	1.21	1.12, 1.31
Latinx	-0.22(0.04)***	0.80	0.74, 0.88
American Indian/Native Alaskan, Hawaiian/Pacific Islander, or two or more races	0.03(0.06)	1.03	0.92, 1.15
Educational Degree			
Doctorate	0.47(0.07)***	1.61	1.39, 1.87
Master's	0.31(0.02)***	1.36	1.30, 1.42
No Bachelor's Degree or Higher	0.72(0.17)***	2.05	1.46, 2.88
Years of Teaching Experience			
0 – 5	0.26(0.03)***	1.29	1.22, 1.36
16+	-0.00(0.03)	1.00	0.95, 1.05
Grade Band			
9–12	0.02(0.03)	1.02	0.96, 1.09
Subject Area			
Mathematics	-0.11(0.05)*	0.90	0.82, 0.98
Science	-0.12(0.06)*	0.89	0.79, 1.00
Social Studies	-0.04(0.06)	0.96	0.86, 1.07
School Locale			
Rural	0.26(0.05)***	1.29	1.17, 1.43
Urban	0.15(0.05)**	1.16	1.05, 1.29
Subject Area X Grade Band or School Locale			
Mathematics X 9–12	-0.01(0.05)	0.99	0.91, 1.08
Science X 9–12	0.10(0.05)*	1.10	1.00, 1,22
Social Studies X 9–12	-0.07(0.05)	0.93	0.84, 1.02
Mathematics X Rural	-0.02(0.06)	0.98	0.87, 1.11
Science X Rural	0.02(0.07)	1.02	0.90, 1.17
Social Studies X Rural	0.09(0.06)	1.09	0.96, 1.24
Mathematics X Urban	-0.02(0.05)	0.98	0.89, 1.09
Science X Urban	0.03(0.07)	1.03	0.91, 1.18
Social Studies X Urban	-0.08(0.06)	0.92	0.82, 1.04

Note. *$p < .05$. **$p < 0.01$. ***$p < 0.001$.

Teachers without a bachelor's degree or higher were statistically significantly more likely to no longer teach (see Table 3). However, teachers with low experience (i.e., 0-5 years) had an estimated increase of 29% in the odds of no longer teaching (RRR = 1.29, 95%CI [1.22, 1.36]). There was not a statistically significant effect in teaching in grades 9-12 compared to in grades 6-8 on the likelihood of no longer teaching in Texas. Compared to English Language Arts and Reading teachers, science (B = -0.12, SE = 0.06, $p < 0.05$) and mathematics teachers (B = -0.11, SE = 0.05, $p < 0.05$) were more likely to continue teaching at the same school. In regard to school locale, teachers in rural (RRR = 1.29, 95%CI [1.17, 1.43]) and urban schools (RRR = 1.16, 95%CI [1.05, 1.29]) were at statistically significant greater risks of no longer teaching in Texas. Of note, examining the moderation of teaching at the high school level on subjects taught and teacher mobility, high school science teachers have a statistically significant increase in likelihood of no longer teaching (B = 0.10, SE = 0.05, $p < 0.05$). Further, there was no statistically significant effect on the likelihood of no longer teaching when examining the moderation of school locale and subject area (see Table 3).

Different District, Different School

The second possible outcome for teacher mobility was *teaching in a different district at a different school* (see Table 4). There was a statistically significant low relative risk of no longer teaching across districts (RRR = 0.07, 95%CI [0.06, 0.08]) accounting for all teacher and school factors. Similar to the risk of no longer teaching in Texas, the odds of Black teachers teaching in a different district at a different school (RRR = 1.31, 95%CI [1.16, 1.47]) were expected to be 31% higher (i.e., 31% = 100% [1.31-1]) than that of White teachers. Whereas the odds of Latinx teachers teaching at a different district in a different school were estimated to be 27% lower than White teachers indicating that Latinx teachers were more likely to continue teaching at the same school (RRR = 0.73, 95%CI [0.64, 0.84]). Accounting for all other teacher and school characteristics, teachers with a doctorate degree were less likely to move districts than teachers with bachelor's degrees (B = -0.33, SE = 0.16, $p < 0.05$).

Teachers with 0-5 years of teaching experience were expected to have a 67% increase in the odds of teaching in a different district (RRR = 1.67, 95%CI [1.58, 1.77]) compared to teachers with 6-15 years of teaching experience, whereas teachers with 16+ years of teaching experience were less likely to move to another school district (B = -0.60, SE = 0.04, $p < 0.05$). There were no statistically significant differences in the likelihood of teaching in a different district based on grade band and subject area (see Table 4). However, teachers in rural schools were more likely to teach in a different district (RRR = 1.45, 95%CI [1.25, 1.69]). Examining the moderation of school locale on subject area and teacher mobility, science (RRR = 1.20, 95%CI [1.01, 1.43]) and social studies (RRR = 1.37, 95%CI [1.16, 1.63]) teachers teaching in rural schools were more likely to move to another school district to teach.

Table 4

Multilevel Multinomial Logistic Regression for Different District, Different School

Predictor	*B*(Robust *SE*)	*RRR*	95% CI for *RRR* *LL, UL*
Intercept	-2.63(0.08)***	0.07	0.06, 0.08
Teacher Race			
Asian	-0.26(0.09)*	0.77	0.65, 0.91
Black	0.27(0.06)***	1.31	1.16, 1.47
Latinx	-0.31(0.07)***	0.73	0.64, 0.84
American Indian/Native Alaskan, Hawaiian/Pacific Islander, or two or more races	0.00(0.09)	1.00	0.83, 1.21
Educational Degree			
Doctorate	-0.33(0.16)*	0.72	0.53, 0.98
Master's	0.03(0.03)	1.04	0.97, 1.11
No Bachelor's Degree or Higher	0.25(0.11)	1.29	1.03, 1.62
Years of Teaching Experience			
0 – 5	0.51(0.03)***	1.67	1.58, 1.77
16+	-0.60(0.04)*	0.55	0.50, 0.59
Grade Band			
9–12	-0.01(0.05)	0.99	0.90, 1.08
Subject Area			
Mathematics	-0.12(0.07)	0.88	0.77, 1.02
Science	-0.07(0.08)	0.93	0.79, 1.09
Social Studies	-0.03(0.08)	0.97	0.83, 1.13
School Locale			
Rural	0.37(0.08)***	1.45	1.25, 1.69
Urban	0.04(0.10)	1.04	0.86, 1.25
Subject X Grade Band or School Locale			
Mathematics X 9–12	-0.05(0.06)	0.95	0.84, 1.08
Science X 9–12	-0.01(0.07)	0.99	0.86, 1.13
Social Studies X 9–12	0.06(0.06)	1.06	0.94, 1.21
Mathematics X Rural	0.25(0.08)	1.29	1.09, 1.52
Science X Rural	0.18(0.09)*	1.20	1.01, 1.43
Social Studies X Rural	0.32(0.09)***	1.37	1.16, 1.63
Mathematics X Urban	-0.02(0.09)	0.98	0.83, 1.16
Science X Urban	-0.03(0.09)	0.97	0.81, 1.17
Social Studies X Urban	-0.09(0.09)	0.91	0.76, 1.09

Note. *$p < .05$. **$p < 0.01$. ***$p < 0.001$.

Same District, Different School

The third possible outcome for teacher mobility was *teaching in the same district at a different school* (see Table 5). There was a statistically significant low relative risk of no longer teaching across districts (RRR = 0.07, 95%CI [0.06, 0.09]) accounting for all teacher and school factors. There was an expected statistically significant increase of 19% in the odds of teaching in a different school in the same district for Black teachers (RRR = 1.19, 95%CI [1.04, 1.37]). Further, there was a small statistically significant increase in the likelihood of teaching in the same district in a different school for teachers with master's degrees (RRR = 1.08, 95%CI [1.01, 1.15]). Teachers with 16+ years of teaching experience were statistically significantly at a lower risk of moving schools within the same district compared to teachers with 5-15 years of teaching experience (RRR = 0.82, 95%CI [0.75, 0.89]). Teachers of grades 9-12 were also at a lower risk of moving schools within the same district compared to teachers of grades 6-8 (RRR = 0.70, 95%CI [0.60, 0.81]). Although there were no statistically significant effects on the likelihood of moving schools within a district for subject area and school locale, there was a statistically significant moderation of teaching in a rural school and teaching social studies (RRR = 1.31, 95%CI [1.05, 1.62]). Of note, there was an estimated statistically significant increase in the odds of moving to another school in the same district for science (B = 0.16, SE = 0.08, $p < 0.05$) and mathematics (B = 0.18, SE = 0.08, $p < 0.01$) teachers of grades 9-12.

Table 5

Multilevel Multinomial Logistic Regression for Same District, Different School

Predictor	*B*(Robust *SE*)	RRR	95% CI for RRR *LL, UL*
Intercept	-2.60(0.10)***	0.07	0.06, 0.09
Teacher Race			
Asian	0.16(0.10)	1.17	0.96, 1.43
Black	0.18(0.07)*	1.19	1.04, 1.37
Latinx	0.05(0.12)	1.06	0.84, 1.33
American Indian/Native Alaskan, Hawaiian/Pacific Islander, or two or more races	-0.16(0.11)	0.86	0.69, 1.06
Educational Degree			
Doctorate	-0.04(0.13)	0.96	0.74, 1.24
Master's	0.07(0.03)*	1.08	1.01, 1.15
No Bachelor's Degree or Higher	-0.21(0.17)	0.81	0.58, 1.14
Years of Teaching Experience			
0 – 5	0.13(0.07)	1.14	0.99, 1.31
16+	-0.20(0.04)***	0.82	0.75, 0.89
Grade Band			
9–12	-0.36(0.07)***	0.70	0.60, 0.81
Subject Area			
Mathematics	-0.06(0.07)	0.94	0.81, 1.09
Science	-0.10(0.07)	0.90	0.78, 1.04
Social Studies	0.01(0.09)	1.01	0.85, 1.19

Predictor	*B*(Robust *SE*)	*RRR*	95% CI for *RRR* *LL, UL*
School Locale			
Rural	0.07(0.10)	1.07	0.88, 1.30
Urban	0.04(0.10)	1.04	0.85, 1.27
Subject X Grade Band or School Locale			
Mathematics X 9–12	0.18(0.08)*	1.19	1.03, 1.39
Science X 9–12	0.16(0.08)*	1.17	1.01, 1.36
Social Studies X 9–12	0.05(0.08)	1.05	0.91, 1.22
Mathematics X Rural	0.05(0.08)	1.05	0.88, 1.25
Science X Rural	0.02(0.09)	1.02	0.86, 1.22
Social Studies X Rural	0.27(0.11)*	1.31	1.05, 1.62
Mathematics X Urban	-0.06(0.09)	0.94	0.78, 1.12
Science X Urban	-0.08(0.09)	0.92	0.78, 1.09
Social Studies X Urban	-0.14(0.10)	0.87	0.71, 1.07

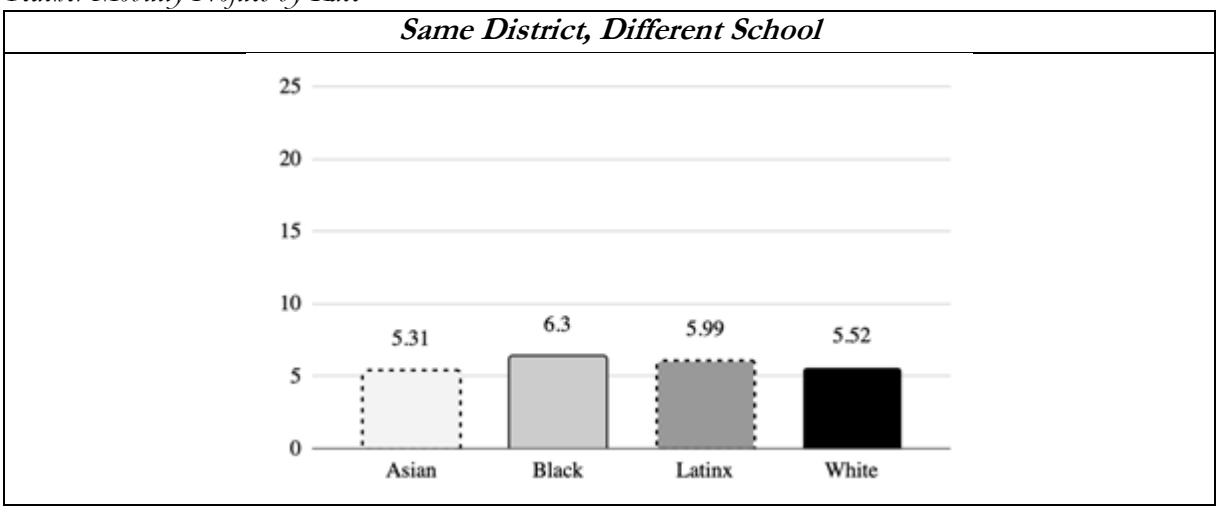
Note. *$p < .05$. **$p < 0.01$. ***$p < 0.001$.

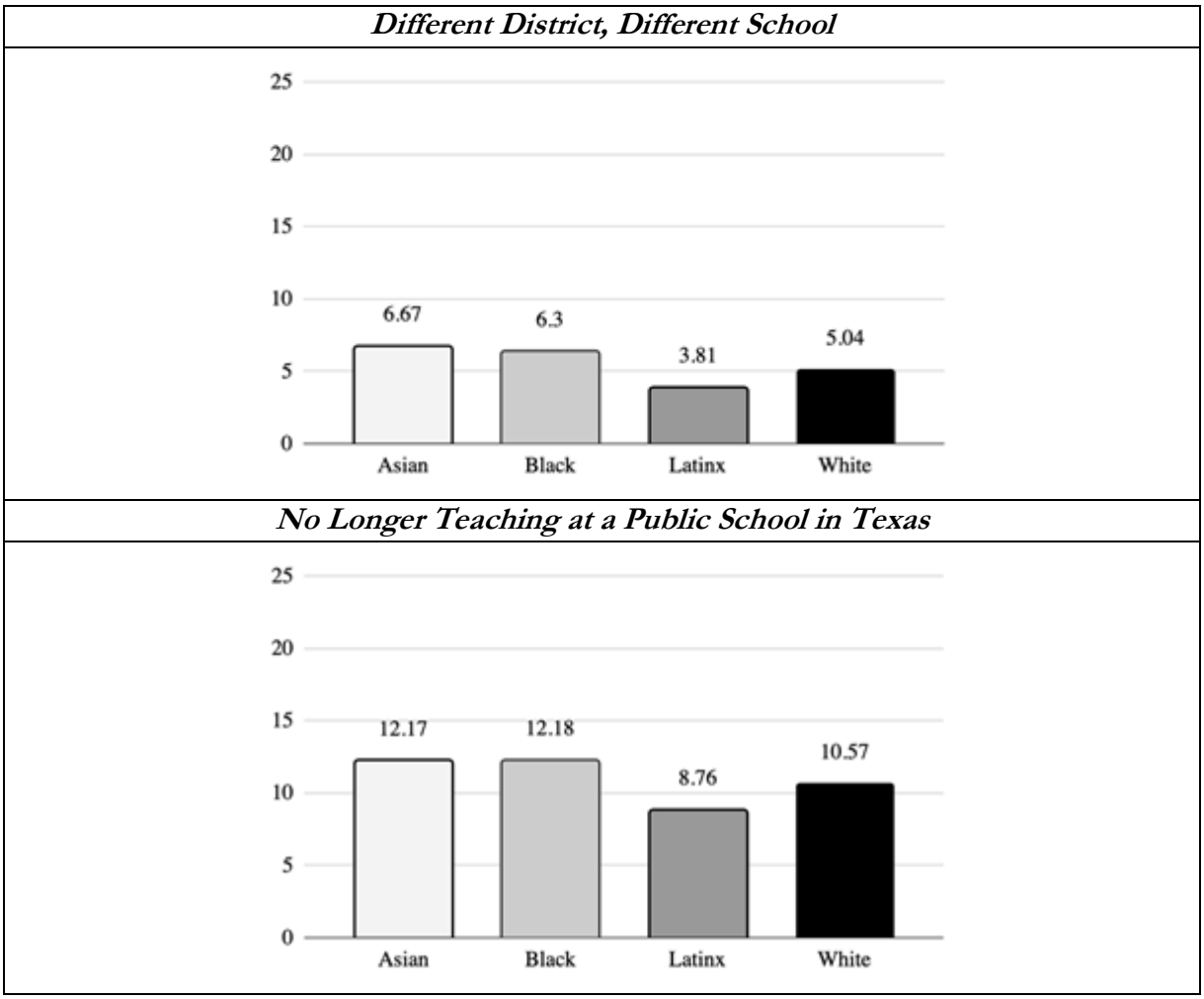
Summary

Our analysis describes the variance in teacher mobility within and between districts. The conditional model explained which teachers were more likely to teach in another district, at another school, or leave teaching in public schools in Texas in addition to what type of schools they were leaving (i.e., grade level, locale). Figure 1 depicts the probabilities of teacher mobility by teacher race. Across each potential mobility outcome, Black teachers in public schools in Texas were at a statistically significant greater risk of teacher mobility. Of note, there were no statistically significant relative risks for teacher mobility for teachers who were American Indian/Native Alaskan, Hawaiian/Pacific Islander, or two or more races (see Tables 3, 4, and 5). For probabilities for the reference outcome see the Appendix.

Figure 1

Teacher Mobility Profiles by Race





**Note.* Solid line = statistically significant ($p < 0.05$) from the reference group (White teachers), Dashed line = not statistically significant

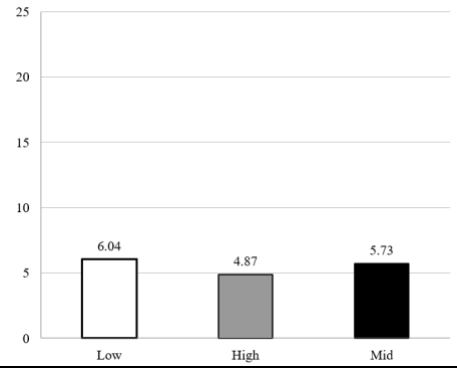
Furthermore, there was a statistically significant increased relative risk of teachers no longer teaching in Texas based on their degree (see Tables 3, 4, and 5). This is concerning as the probability of teachers leaving teaching in Texas were 17.56% for teachers with a doctorate degree, 15.02% for teachers with a master's degree, and 11.54% for teachers with a bachelor's degree. Probationary certified teachers, that are teachers with no bachelor's degrees, had a 21.04% probability of no longer teaching in Texas. Educational degree and teacher mobility had the strongest relationship for no longer teaching in Texas.

Figure 2 illustrates probabilities of teacher mobility by teaching experience level. Teachers with low experience (i.e., 0-5 years) had statistically significant probabilities of no longer teaching in public school in Texas (13.87%) and moving to another district to teach (8.58%). Teachers with low experience (i.e., novice teachers) were likely to exit teaching or move to another community (i.e., district) to try teaching somewhere else. Whereas teachers with a high level of teaching experience (i.e., 16+ years) had a statistically significant low probability of moving schools within the same district (i.e., 4.86%, staying within the same community).

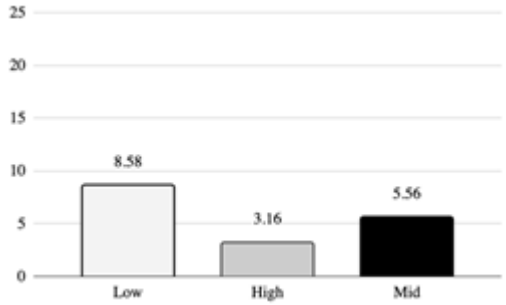
Figure 2

Teacher Mobility Profiles by Teacher Experience

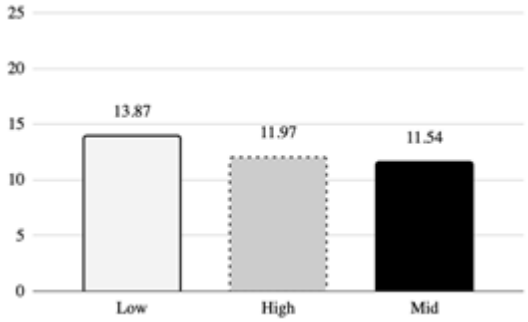
Same District, Different School



Different District, Different School



No Longer Teaching at a Public School in Texas



**Note*. Solid line = statistically significant ($p < 0.05$) from the refence group (Mid), Dashed line = not statistically significant, Low = 0-5 years of teaching experience, High = at least 16 years of teaching experience, Mid = 6-15 years of teaching experience

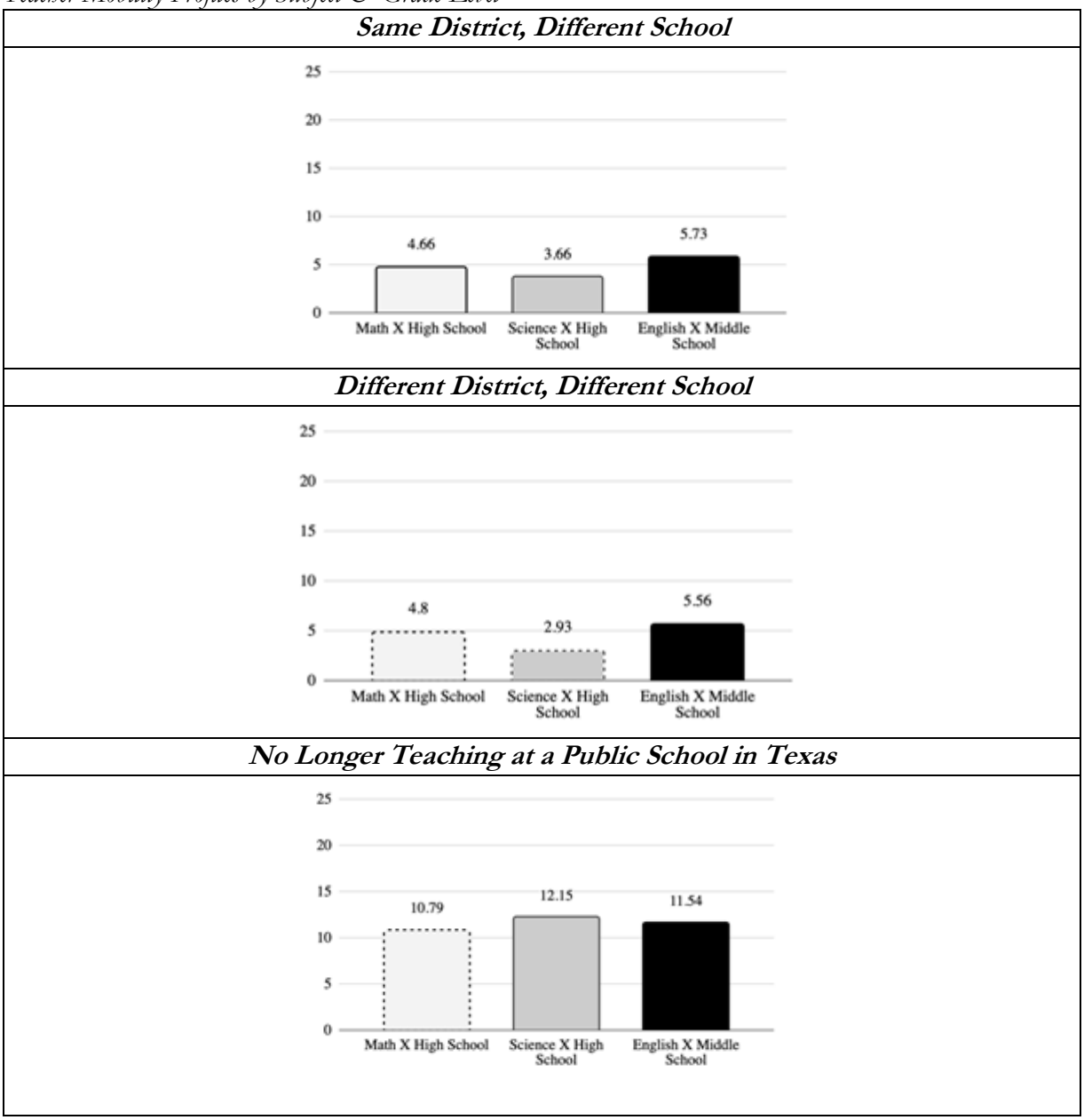
Regarding school locale, teachers in rural and urban schools had statistically significant probabilities of no longer teaching at a public school in Texas (i.e., rural = 14.08%, urban = 13.59%), both of which are greater than the probability that a teacher in a suburban school will not return to teaching (11.54%). Moreover, no other effects were statistically significant for urban teachers. However, rural teachers had a probability of 7.57% teaching in another district. Future studies can examine what school locales urban teachers are moving to when changing districts.

Figure 3 depicts the probabilities of teacher mobility by subject and grade level. Of note, there were no statistically significant relative risks of teacher mobility for social studies teachers. High school

science teachers had a statistically significant 12.15% probability of no longer teaching in a public school in Texas. Further, mathematics and science high school teachers had statistically significant probabilities of moving to another school within the same district (see Figure 3). However, the probabilities of moving schools within the district were lower than the reference (i.e., English Language Arts and Reading, middle school). This may also be due to the number of middle schools versus high schools within districts, but there were no statistically significant effects for moving to teach in another district. Thus, high school science teachers appear to be mostly leaving teaching or continuing to teach at the same school.

Figure 3

Teacher Mobility Profiles by Subject & Grade Level



Note. Solid line = statistically significant ($p < 0.05$), Dashed line = not statistically significant

Discussion

This study examined the patterns and predictors of secondary teacher mobility (i.e., 2017-2019) in Texas, focusing on the intersections of grade-band, subject area, school locale, and teacher race while accounting for educational degree and years of teaching experience. The findings contribute to the ongoing discourse on teacher retention and mobility, particularly in addressing inequities and challenges that persist across different school settings and among diverse teacher populations. To better understand these patterns, we frame our discussion using Nguyen and Springer's (2023) conceptual framework of teacher turnover, which identifies personal, school-related, and external correlates as key drivers of mobility.

Personal Correlates: Teacher Characteristics and Qualifications

Personal correlates, including teacher demographics, educational attainment, and professional experience, are central to Nguyen and Springer's (2023) framework. Our study found that Black teachers were significantly more likely to leave teaching in Texas compared to their White counterparts, while Latinx and Asian teachers demonstrated higher retention rates. These disparities suggest that systemic barriers, including lack of career advancement opportunities and workplace climate, may be contributing factors (Achinstein & Ogawa, 2011; Carter Andrews et al., 2019). Additionally, teachers with fewer than five years of experience were at the highest risk of leaving the profession or transferring to another district, reinforcing the need for strong induction and mentorship programs (Borman & Dowling, 2008; Carver-Thomas, 2018). The strong association between educational degree and mobility also suggests that teachers with advanced degrees may be drawn to alternative career opportunities outside of teaching, further exacerbating retention challenges in critical subject areas (Sorensen & Ladd, 2020).

School Correlates: Grade-Band, Subject Area, and School Locale

Nguyen and Springer (2023) emphasize school-related factors such as school locale, student demographics, and working conditions in influencing teacher turnover. Our findings indicate that teachers in rural and urban schools were significantly more likely to leave the profession compared to their suburban counterparts, reinforcing prior research on disparities in school resources and professional development access (Berry et al., 2021; Nguyen, 2020). Rural teachers faced higher risks of leaving or transferring to another district, highlighting the need for targeted interventions such as improved housing support, mentorship opportunities, and access to professional learning communities (Beesley et al., 2010; Monk, 2007). Furthermore, our results suggest that high school science teachers were at the highest risk of leaving teaching, aligning with persistent national shortages in STEM education (Clewell & Forcier, 2001; Ingersoll & Perda, 2010). Rural high school science teachers often teach in professional isolation with limited access to discipline-specific colleagues and broader professional community (Goodpaster et al., 2012; Poulsen et al., 2024). This pattern is associated with lower job satisfaction and weaker retention rates (Handal et al., 2013). Emerging evidence suggests that hybrid professional development models can meaningfully reduce rural science teacher isolation by expanding professional networks across geographic boundaries, including long-distance ties that support collaboration and personal encouragement (Amin et al., 2026). These results highlight the need for policymakers and educational leaders to address the unique challenges faced by teachers in different school locales and subject areas. Future research should focus on developing and evaluating targeted retention strategies to support teachers in high-risk settings and disciplines, ultimately promoting a more stable and effective education workforce.

External Correlates

Nguyen and Springer (2023) highlight external correlates such as teacher evaluation policies, workforce incentives, and school reform initiatives as influential in teacher turnover. Although not explicitly tested in our model, prior work has illustrated that financial incentives (Blackmore et al., 2024; Chitwood, 2024) and additional workforce-related supports, such as hiring practices and working conditions, play a role in keeping teachers in the profession (Amitai & Van Houtte, 2022; Frahm & Cianca, 2021). This study was exclusive to investigating teacher mobility in Texas which has teacher attrition rates above the national average (Taie & Lewis, 2023). Due to the context of the data, our findings suggest that broader policy efforts, such as Texas's Teacher Incentive Allotment and Grow Your Own (GYO) programs, have likely had mixed results in improving retention (Sims, 2022; TEA, 2020). For instance, from the 2017-2018 to the 2018-2019 school year, approximately 73% of secondary teachers (i.e., middle and high school) continued teaching at their same school. Moreover, controlling for teacher and school level factors, there was a statistically significant low relative risk of teachers no longer teaching, teaching in a different district at a different school, and teaching within the same district at a different school in Texas. However, despite the relatively low risk of teacher mobility, results of our analysis demonstrate that the likelihood of teachers staying is sensitive to teacher and school characteristics. Thus, future research may specifically examine the effects of programs such as the Teacher Incentive Allotment and GYO on the risk of Texas teachers' mobility accounting for teacher (e.g., race, years of experience) and school (e.g., locale) characteristics.

Limitations and Future Research

While this study offers valuable insights, its scope is limited to Texas and the pre-pandemic period, therefore not capturing shifts in teacher mobility since COVID-19. Future research should employ survival analyses to track post-pandemic trends in teacher retention, utilizing this study as a baseline of teacher mobility, shaped by external, personal, and school-related factors. Moreover, the variables in the data set do not capture teachers' subjective experiences (e.g., job satisfaction), motivations (e.g., why leave/stay), or perceived quality of their working conditions (e.g., administration support). Pairing the TEA data with observations that capture the teachers' subjective experiences could provide more comprehensive insights to teacher mobility in Texas. Additionally, qualitative and mixed methods studies could provide deeper insights into the motivations and experiences behind teacher mobility decisions.

Conclusion and Implications

By framing our discussion within Nguyen and Springer's (2023) conceptual framework, we highlight how teacher mobility in Texas is shaped by both personal and school-related factors. Overall, the results show that mobility is not evenly distributed but is concentrated among specific groups and settings. Given the elevated mobility rates among early-career teachers (i.e., 29% increased risk of no longer teaching in Texas and 67% increased risk of transferring school districts), districts would likely see improved retention rates if they were to implement comprehensive induction programs, including mentorship, reducing teaching loads, and increasing financial incentives (Ingersoll & Smith, 2004; Ronfeldt & McQueen, 2017). Providing professional development tailored to the needs of novice teachers can also improve retention (Carver-Thomas, 2018; Garcia & Weiss, 2020).

Moreover, the higher attrition rates among Black teachers (i.e., 21% higher risk of no longer teaching in Texas compared to White teachers) call for targeted interventions, such as affinity groups, leadership development opportunities, and bias-reduction training for school administrators (Achinstein & Ogawa, 2011; Carter Andrews et al., 2019). Ensuring that teachers of color have access to supportive networks and professional advancement opportunities may improve retention. Because this pattern appeared across multiple mobility outcomes, these supports should focus on both retention and improving school conditions. These patterns may reflect broader systemic factors, though these were not directly measured in this study.

Furthermore, the high exit rates among science teachers suggest that more competitive salaries and career advancement opportunities may be helpful. Some districts have been able to improve retention through loan forgiveness programs, bonuses for STEM educators, and partnerships with universities to provide ongoing training (Clewell & Forcier, 2001; Ingersoll & Perda, 2010). Policymakers should consider context-specific strategies, such as initiatives like housing incentives and increased funding for professional development, to mitigate teacher mobility in rural and urban schools. This is especially important given that teachers in rural and urban schools were more likely to leave teaching compared to those in suburban schools. Expanding the scope of GYO programs and tailoring them to specific local needs may also help stabilize the teaching workforce in these settings (Sims, 2022; TEA, 2020). As Texas continues to implement teacher retention initiatives, this framework provides a useful schema to consider multidimensional approaches aimed at ensuring long-term improvements in educator workforce stability.

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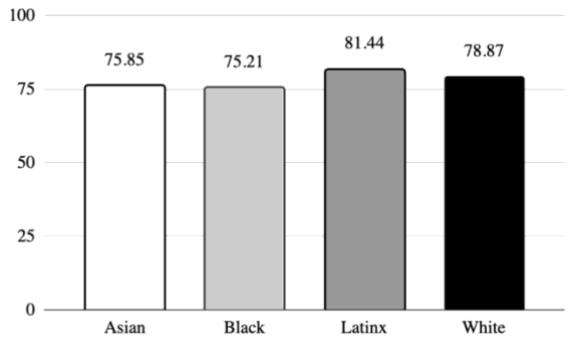
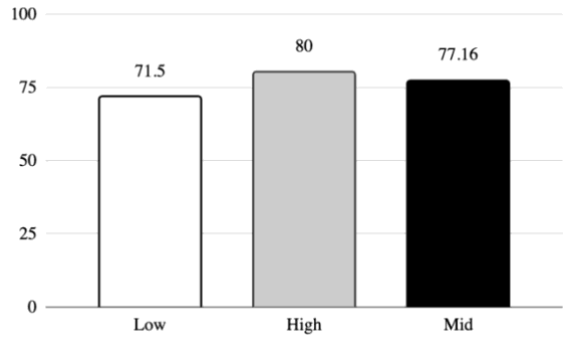
Appendix

Probabilities of Teachers Staying in the Same District and Same School

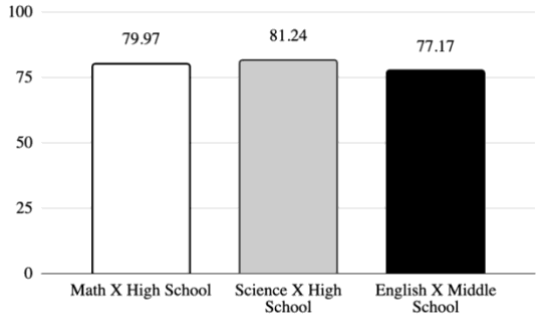
Teacher Race



Teacher Experience



Subject & Grade Level



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Exploring the Depressive Subgroups Among Adolescent Latino Boys Who Have Experienced School Policing and School Discipline

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Exploring the Depressive Subgroups Among Adolescent Latino Boys Who Have Experienced School Policing and School Discipline

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Abstract

Objective: To examine the relation between school policing, school discipline, and depressive symptoms among adolescent Latino boys.
Methods: Using a subsample (N = 421) of adolescent Latino boys from the Future of Families & Child Wellbeing Study (FFCWS), a latent class analysis identified depressive subgroups based on school policing and discipline indicators, with depressive symptoms measured by the CES-D 5. Covariates included mental health history, school connectedness, and demographics.
Results: A three-class solution emerged. Class 1 (61.3%) had high police and security presence with low contact and discipline, with the lowest depressive score. Class 2 (22.6%) was mostly not policed or disciplined, with a moderate depressive score. Class 3 (16.2%) had low police and security presence with high contact and discipline, with the highest depressive score.
Conclusion: Educators, policymakers, and parents should recognize that school policing and discipline patterns, not just their presence, shape Latino boys' depressive symptoms.

Keywords: Adolescent Latino boys, Latinx adolescent mental health, School policing, School discipline, Depressive symptoms

Introduction

School policing and school discipline have become a permanent fixture in U.S. public schools, even though they largely predict and are related to unfavorable student outcomes, like adverse student safety (Gottfredson et al., 2020) and adverse mental health (Jackson et al., 2019; So et al., 2023). In terms of mental health, previous scholarship has observed unfavorable depressive outcomes for students of color, and Black students in particular (anonymized5; anonymized2). While previous research on school policing and/or discipline and mental health has included Latinx samples, it is difficult to surmise notable implications for this student population. Perhaps, this happens because of two problems: (a) studies with a diversity of races and ethnicities have small subsamples of Latinx students, and (b) the use of linear, variable-centered approaches makes it difficult to capture the appropriate level of nuance to understand the lived experiences of Latinx students. Further and finally, while there are scant amounts of studies that use delimited samples of adolescent Latinx students, there are even fewer studies about Latino boys that center their experiences with school policing, school discipline, and depressive symptoms. This study will seek to in part address this lacuna with a subsample (*N* = 421) of 15-year-old adolescent Latino boys who participated in the Future of Families & Child Wellbeing Study (FFCWS). Addressing this lacuna assists in identifying the depressive profiles of adolescent Latino boys, an often-overlooked population, who have experienced school policing and school discipline in their schools.

Literature Review

Brief Timeline of School Policing and "Zero-Tolerance" School Discipline Policies

In the 1980s, the former Reagan administration influenced educational policies in many ways, specifically related to school discipline policies in chorus with criminal legal system policies. In 1986, under Reagan, the U.S. Congress passed the Anti-Drug Abuse Act, which slated $1.7 billion for the War on Drugs, and many of those tax dollars fueled school policing initiatives. With the War on Drugs in the 1980s and 1990s as a backdrop, school policing took a more punitive direction. This included "zero-tolerance" school discipline policies, which are policies about educational discipline that require school officials to carry harsh, predetermined consequences regardless of context and situation (Nance, 2016). The rationale for inserting an increased amount of school police in the 1980s was due to gang violence and crime in urban schools, and in the 1990s, the rationale for school policing was the emergence of mass shootings in suburban schools (Addington, 2009). In the 21st century, school discipline policies impacted approximately 3 million students in the United States who were suspended (Losen & Gillespie, 2012), and suspension rates for students of color have doubled since the 1970s (George, 2015; Losen & Gillespie, 2012; Morris & Perry, 2016).

Increasing Numbers of School Police

Since the inception of school policing in the 1930s in Indianapolis, Indiana, there have now been approximately 23,400 sworn school police officers, and 69% of these have responded to a classroom incident (Davis, 2023). Initial studies found that school policing was associated with favorable outcomes on student safety (Jennings et al., 2011; Johnson, 1999; May et al., 2004); however, more recent studies have linked an increase in school police presence with unfavorable outcomes on student safety (Devlin & Gottfredson, 2018a, 2018b; Gottfredson et al., 2020; Na & Gottfredson, 2013) and student pushout (George, 2015; M. W. Morris, 2016).

According to national studies in the United States, the mid-1900s saw increased school police presence, with 54% of schools employing school police; by 2007, the percentage had risen to 70% (Stinson & Watkins, 2014). During the 2013–2014 school year, 63% of middle schools and 64% of high schools employed school police (Higgins et al., 2020)—a significant jump from 10% of schools employing school police during the 1996–1997 school year (Fisher & Devlin, 2020). More recently, during the 2019-2020 school year, a Rand Corporation report found that 65% of schools employed school police, a substantial increase from 42.8% during the 2009-2010 school year (Welburn Paige & Bushway, 2024).

School Police: Definitions, Roles, and Role Conflicts

School police are sworn police officers, but also non-sworn hired security (Coon & Travis, 2012; Loyens, 2009; Mckenna & Pollock, 2014; Raymond, 2010; Ruddell & May, 2013; Watkins & Maume, 2012). According to the National Association of School Resource Officers (NASRO, 2006), the threefold mission of school police officers include enforcing the law, counseling, and educating (NASRO, 2006). School officials report that the primary role of school police is participating in punitive law enforcement activities, even though school police, themselves, report spending more time counseling and educating students (Coon & Travis, 2012). This role conflict means that school police are mostly being used as punitive educational actors towards students, and prior literature has

demonstrated how punitive actions are related to the depressive symptoms of minoritized students (Pamplin et al., 2023).

Latinx Students, School Policing, and School Discipline

The zero-tolerance era of school discipline has been unfavorable to Latinx students. To a lesser extent, research had paid less attention to Latinx students, which is surprising because Latinx students, along with their Black peers, attend schools with large amounts of school police. The Civil Rights Data Collection data has found that 34-37% of schools predominately comprised of Black or Latinx/Hispanic students have school police present (United States Department of Education, Office for Civil Rights, 2021). In contrast, 5-11% of schools that are mainly composed of White students have school police present (United States Department of Education, Office for Civil Rights, 2021).

Latinx students are disciplined at disproportionate rates compared to their White peers (Gage et al., 2021). In 2018, a national report published by the U.S. Government Accountability Office found Latinx students were 1.3 times more likely to be school disciplined than their White peers (United States Government Accountability Office, 2018). For a local, state-level example, the Arizona Center for Investigative Reporting found that Latinx students were 60% of the 12,500 students enrolled in Glendale Union High School District (Glendale, Arizona), and these students composed 90% of all suspended students (Garcia Mathewson et al., 2022). Indeed, Latinx students are in the crosshairs of school policing and discipline, and more research on the related mental health outcomes, and especially their depressive symptomology, is warranted.

Mental Health, School Policing, and School Discipline

School policing is related to poor mental health outcomes among youth (Jackson et al., 2019; Pamplin et al., 2023; anonymized; Tocci et al., 2023), and depressive symptoms among minoritized youth (anonymized5; anonymized2). However, scant is the research on specific relation between school policing and depressive symptoms among adolescent Latino boys. Extant studies show that school policing and school discipline are related to adverse depressive symptomology among Black or Latinx youth (Jackson et al., 2019; Pamplin et al., 2023; anonymized; Tocci et al., 2023), and in particular, extant research have used samples of adolescents that have included Latinx youth (Jackson et al., 2019; anonymized5; So et al., 2023), yet there is still a gap in this research catalog that gives particular attention to investigating the depressive profiles among adolescent Latino boys who have experienced school policing and school discipline. The current study seeks, in part, to address this lacuna.

Latino Boys' Mental Health, School Policing, and School Discipline

Burgeoning research has found that school policing is related to unfavorable mental health outcomes among racially minoritized youth (Choi et al., 2023; Gonzalez, 2021; Jackson et al., 2019; anonymized). Studies that employ samples of respondents from a diversity of racial and ethnic backgrounds, and include Latino boys, found that school policing is related to unfavorable mental health conditions (Jackson et al., 2019; So et al., 2023). Populations of Black youth have found that their depressive symptoms are comprised of being school policed and school disciplined (anonymized). Though the present scientific advances are helpful, more research is needed to understand the unique, multidimensional (Mutua, 2013) experiences of Latino boys related to school

policing, school discipline, and depressive symptoms, a key aspect of racial battle fatigue among male students (Smith et al., 2011) and Latinx students (e.g., Call-Cummings & Martinez, 2017; Franklin, 2019).

Theoretical Framework

Multidimensionality Theory

Mutua (2013) argues that intersectionality theories are preparatory theories for understanding the multidimensionalities of men of color, therefore, Multidimensionality Theory demonstrate the nexus of arduous gendered racism toward men of color targets. According to Multidimensionality Theory, men of color have *internal* dimensions that show varying rankings/levels/degrees of behavior performances and *external* dimensions that assign men of color to hierarchical levels of race and class. This complexity of internal and external dimensions satisfies the privilege paradox (one privileged structure and one subordinate structure) that gender scholars usually assign to men of color (Mutua, 2013). The varying grades of race and class made it more suitable to pivot from more conventional ideas of intersectionality (Crenshaw, 1989, 1993), which has historically been used to theorize the gender-racial experiences of women of color. Mutua (2013) explains: "…While women's lives were difficult because they were oppressed it appeared that their identities were not complex unless complicated by the intersection of another subordinating structure. From this perspective, masculine identities seemed more complex than women's identities because the ranking of men occurred along at least two axes: an internal axis centering around performances, appearances, and behavior, and external one centering around the multitude of intersecting systems, such as race and class" (p. 361). Applying Multidimensionality Theory to the educational carceral experiences of Latino boys allows for the understanding of how the internal and external dimensions of adolescent Latino boys' identities shape their depressive symptomology in carceral school environments. Specifically, Multidimensionality Theory frames how the combination of racialized and gendered experiences of adolescent Latino boys as they traverse school policing and school discipline relate to distinct, unique depressive profiles.

Racial Battle Fatigue Theory

Racial Battle Fatigue (RBF) theory assists in understanding the relationship between school policing behaviors, school discipline, and depressive symptomology among adolescent Latino boys because RBF underscores the relationship between racism in educational institutions and the health outcomes of Latinx students (Franklin et al., 2014). Racial battle fatigue is a psychological and physiological response experienced by students of color sustained while attending educational institutions replete with racism (Smith, 2010). Some of the psychological symptoms of racial battle fatigue include, but are not limited to, depression, frustration, shock, anger, disappointment, resentment, anxiety, helplessness, hopelessness, and fear (Smith, 2010; Smith et al., 2016). Some of the physiological symptoms of racial battle fatigue include, but are not limited to, headaches, teeth grinding, chest pain, shortness of breath, high blood pressure, muscle aches, indigestion, constipation, diarrhea, increased perspiration, fatigue, insomnia, frequent illness (Smith, 2010; Smith et al., 2016). For example, Black students who are stopped by school police have psychological experiences symptomatic of RBF, such as depressive symptoms (Smith, 2010; Smith et al., 2016). Though Latinx students have reported experiencing RBF (Franklin et al., 2014), it is yet to be tested in the context of school policing, school discipline, and the depressive symptoms among adolescent Latino boys. Given the nexus of school policing and school discipline in educational environments, depressive symptomology, and the unique experiences among adolescent Latino boys, approaching

this work from a multidimensional-racial battle fatigue theoretical lens can illuminate what is explicitly experienced by these adolescent boys and the carceral experiences that they encounter in their own schools.

Purpose and Hypotheses

The purpose of the present study was to explore and understand the relationship between school policing, school discipline, and depressive symptoms among adolescent Latino boys. To do so, this study used a national sample (Reichman et al., 2001) of 15-year-old Latino boys using latent class analysis, which is meant to describe individual nuances of unseen (i.e., latent) subgroups, themes, or features using national studies, rather than variable-centered linear relationship (Collins & Lanza, 2009). It was hypothesized that there would be nuanced subgroup differences between adolescent Latino boys and levels of depressive symptoms by whether they had (1) police officer or officers regularly stationed at school, (2) some other security guard regularly stationed at school, (3) been stopped by police at school, (4) ever seen someone stopped by police in their school, and/or (5) ever been suspended or expelled in the past two years.

Methods

Sample Population

This study used data from the Year 15 wave (Bendheim-Thoman Center for Research on Child and Family Wellbeing, 2021) of the Future of Families & Child Wellbeing Study (FFCWS), a nationally representative research study. FFCWS is an ongoing study which began data collection in 1998 and spans 77 large United States (U.S.) cities. Data were collected from 4,700 births in 75 hospitals in cities across the United States (Reichman et al., 2001). The total sample size of the FFCWS was 4,898, and after delimiting the sample to only Latino male respondents, the final analytic sample for this study was 421 adolescent Latino boys.

Table 1

Descriptives, Future of Families & Child Wellbeing Study, Year 15

	Total *N* = 421 (%)	Mean (SD)
Depressive symptom scores (CES-D 5; R = 0, 15)		2.72 (2.79)
	416 (98.81)	
Police officer or officers regularly stationed at school		
No	77 (18.28)	
Yes	339 (80.52)	
	411 (97.62)	
Some other security guard regularly stationed at school		
No	119 (28.26)	
Yes	292 (69.35)	
	130 (30.87)	
Stopped by police at school?		
No	97 (23.04)	
Yes	33 (7.83)	

	417 (99.04)
Ever seen others stopped by police at school	
No	211 (50.11)
Yes	206 (48.93)
	419 (99.52)
Ever been suspended or expelled in past two years	
No	309 (73.39)
Yes	110 (26.12)

Latent Variable Indicators

The depressive symptoms variable was measured using five items selected by FFCWS from the Center for Epidemiologic Studies Depression (CES-D) scale (Radloff, 1977). The items were taken from the full 20-item scale to enhance cross-cultural comparability by validating this measure on diverse samples (Perreira et al., 2005). The five items used include: "I feel depressed," "I feel I cannot shake off the blues, even with help," "I feel sad," "I feel life is not worth living," and "I feel happy." Participants responded on a 4-point Likert scale, ranging from 1 (*strongly disagree*) to 4 (*strongly agree*). The scoring instructions required that these variables be recoded so that higher scores reflect higher levels of depressive symptoms, except for the "I feel happy" variable which was reverse-coded, indicating lower depressive symptoms. A composite variable using the summed totals of the items mentioned above was created to assess depressive symptoms. The Cronbach's Alpha for this measure was 0.77.

To understand depressive symptoms, as measured by the CES-D 5, prior research has fit and estimated the CES-D for young people (Fagan, 2022). CES-D scores of 15 or above are based on the entire 20-item CES-D instrument on a 0-3 scale, which is clinically significant for depressive symptoms for 15-year-old adolescents. The FFCWS, though, has employed one-quarter of these items, and therefore, it is suggested to multiply the maximum possible score (a score of 15) with the CES-D 5 by 0.25 (Fagan, 2022). This multiplication equals 3.75, providing the clinical cutoff for clinically depressive symptoms among young people (Fagan, 2022).

The indicators of school policing and school discipline were self-reported variables. Participants were asked whether "police officer or officers regularly stationed at school?"; "some other security guard regularly stationed at school?"; "stopped by police at school"; "ever seen someone stopped by police in your school?"; and "ever been suspended or expelled in the past 2 years?" These variables were all categorized as yes or no.

Covariates

Mental health history was measured by asking primary caregivers, in Wave 9, whether their children were unhappy, sad, or depressed; responses included: "not true," "somewhat or sometimes true," or "very true or often true." The three responses were categorized into a yes/no variable, with the first response being no and the last two responses being categorized as yes. School connectedness was measured with the following yes/no questions: "Kids at school pick on you or say mean things to you" (which is a measure of discrimination) and "I am happy to be at my school." Demographic information was used to capture the following variables: maternal income level (up to $14,999, $15,000 to $34,999, and $35,000+), maternal educational level (less than high school, high school or

equivalent, some college or higher), and maternal nativity (born in the United States or elsewhere). In keeping with previous literature on school policing, school discipline, and depressive symptoms among racially minoritized youth, the following covariates were chosen for this study (e.g., anonymized5).

Analytic Strategy

This study first analyzed sample characteristics of the adolescent Latino boys to gain some understanding of the various identities of the respondents. Second, I used latent class analysis (LCA) to identify depressive subgroups of conditional probabilities regarding the indicators of school policing and school discipline, using depressive symptoms as the continuous indicator. A comparative approach was employed to choose the best LCA model for interpretation, where I compared multiple models (e.g., a 1-class to 3-class solution). The criteria for model fit were Bayesian information criterion (BIC), sample size adjusted (SSA) BIC, Lo-Mendell-Rubin (LMR) adjusted likelihood ratio test (LRT), parametric bootstrapped (PB) LRT, and entropy. The entropy score avails itself of a reliability index for separating classes or subgroups (Nylund et al., 2007). Then, I used a multinomial logistic regression to examine the role of covariance in distinguishing between subgroup differences and class membership. All these analyses were done in *Mplus* (Version 8.4; Muthén & Muthén, 2017).

Results

Descriptives

The CES-D 5 depressive mean score was 2.72 (*SD* = 2.79). The majority of respondents had a police officer or officers regularly stationed at school (80.52%). The majority of respondents had some other security guard regularly stationed at school (69.35%). The majority of respondents had not been stopped by police at school (23.04%). The majority of respondents had not ever seen others stopped by police at school (50.11%). The majority of respondents had not ever been suspended or expelled in the past two years (73.39%).

Latent Class Model

A three-class solution was chosen by interpreting the criteria in Table 2. The subgroups were labeled for respondent reports of school policing and school discipline. Ascending CES-D 5 depressive mean scores organized subgroups. Since a three-class solution was chosen by an interpretive approach (i.e., interpreting criteria in Table 2), and therefore, an interpretive approach was used to identify, categorize, and name classes based on conditional probability, as seen below.

Table 2

Model Fit Criteria by Comparison of k-Class Solution

	AIC	BIC	ssa-BIC	Entropy	LMR-LRT	pb-LRT p-value
Class 1	4167.91	4196.21	4173.99	-	-	-
Class 2	4140.72	4197.32	4152.89	0.91	40.237*	0.0000
Class 3	4037.61	4122.51	4055.87	0.66	36.453***	0.0000

Note. p-value <.001***, p-value <.01**, p-value =<.05*; LMR: Lo-Mendell-Rubin; LRT: likelihood ratio test; pb: parametric bootstrap

Class 1 had the lowest depressive mean score (1.51). Presented in Table 3, Class 1 (61.3% of the sample) was categorized as the "high in police and security regularly stationed/low in police contact and discipline at school" subgroup, as this profile exclusively (100%) having a police officer or officers regularly stationed at school, and the highest conditional probability (84%) of some other security guard regularly stationed at school. Further, most of this profile had not ever been stopped by police at school (75%) and most of this profile were not ever suspended or expelled in the past two years (81%). Most of this profile reported having ever seen someone stopped by police at school (52%).

Table 3

Three-Class Solution Conditional Probabilities

	Class 1	Class 2	Class 3
	258 61.3%	95 22.6%	68 16.2%
Police officer or officers regularly stationed at school?			
No	0.00	0.53	0.13
Yes	1.00	0.47	0.87
Some other security guard regularly stationed at school?			
No	0.16	0.55	0.22
Yes	0.84	0.45	0.78
Have you ever been stopped by police at school?			
No	0.75	0.91	0.52
Yes	0.25	0.10	0.48
Have you ever seen someone stopped by police in your school?			
No	0.48	0.60	0.40
Yes	0.52	0.40	0.60
Ever been suspended or expelled in the past two years?			
No	0.81	0.64	0.70
Yes	0.19	0.36	0.31
Depressive symptoms			
Mean	1.516	2.118	7.649

Class 2 had the moderate depressive mean score (2.11). Presented in Table 3, Class 2 (22.6% of the sample) was categorized as the "mostly not school policed and disciplined" subgroup, as this profile had lower percentages of responding "yes" to all school policing and school discipline indicators: police officer or officers regularly stationed at school (47%), some other security guard regularly

stationed at school (45%), having you ever been stopped by police at school (10%), have you ever seen someone stopped by police in your school (40%), and ever been suspended or expelled in the past two years (36%).

Class 3 had the moderate depressive mean score (7.64). Presented in Table 3, Class 3 (16.2% of the sample) was categorized as the "low in police and security regularly stationed/high in police contact and discipline at school" subgroup, as this profile mostly had a police officer or officers regularly stationed at school (87%) and some other security guard stationed at school (78%).

Presented in Table 4, Class 1 had 9% lower odds of having a prior mental health history, and 18% lower odds of having a mother who had an income level of $15,000 to $34,999 than Class 3. Class 2 had 35% lower odds of having a prior mental health history, and 15% lower odds of having a mother who had an income level of $15,000 to $34,999 than Class 3.

Table 4

Multinomial Logistic Regression of Adolescent Hispanic Boys Subgroups

	Class 1				Class 2			
		95% CI				95% CI		
	OR	Lower	Upper	*p-value*	OR	Lower	Upper	*p-value*
Prior mental health history	**0.09**	**0.07**	**0.65**	**0.00**	**0.35**	**0.20**	**0.62**	**0.02**
Kids at school pick on you or say mean things to you	**0.18**	**0.14**	**0.22**	**0.00**	**0.15**	**0.10**	**0.22**	**0.00**
Maternal income level of $15,000 to $34,999	0.67	0.38	1.20	0.27	1.40	0.29	6.82	0.62
Maternal high school education or equivalent	2.92	0.19	46.06	0.17	0.44	0.18	1.11	0.23
Mother born in U.S.	1.96	0.35	10.85	0.27	2.12	0.18	25.19	0.38

Notes. This table uses the "low in police and security regularly stationed/high in police contact and discipline at school" Subgroup (Class 3) as the Reference. Boldface type indicates significant odds ratios based on 95% CI and p <.05. OR = odds ratio

Discussion

The purpose of my study was to explore and understand how school policing and school discipline are influencing the depressive symptomology of adolescent Latino boys, and some notable findings surfaced. The key findings include (a) though most respondents were not experiencing higher depressive symptoms (Class 1), most of the adolescent Latino boys reported that being policed (whether school police being stationed or school police contact) impacted their depressive symptoms; (b) adolescent Latino boys who reported a combination of high levels of school police presence and moderate levels of school police contact (themselves or another student) comprised the highest depressive symptoms mean score (Class 3); and (c) all three classes reported low levels of

school discipline partially impacting their depressive symptoms. Finally, (d) the major difference between Class 1 and Class 3 was minimal. While the majority of in-class patterns were the same for both Classes 1 and 3 (i.e., yes=mostly had regularly stationed school police, yes=mostly had regularly stationed school security, no=mostly were not stopped, yes=mostly saw other students stopped by school police, and no=mostly were not disciplined), Class 3 was lower than Class 1 in regularly stationed school police and security. Additionally, Class 3 was higher than Class 1 in school police contact and school discipline. Unfortunately, even though many conditional probabilities (e.g., police regularly stationed), were not higher for Class 3 compared to Class 1, the described pattern of conditional probabilities seemed to make all the difference regarding comprising the highest depressive symptomology for boys in Class 3 (M = 7.649).

Taken together, referencing Class 3—the findings from Class 2, in tandem with Class 1, are instructive such that no amount of presence, contact, or discipline is 'best' for the depressive symptomology of adolescent Latino boys. But, if presence, contact, and discipline happen, and they probably will give the current climate of zero-tolerance discipline and police, higher probabilities of school police presence and lower probabilities of contact and discipline lend to the lowest depressive mean score (M = 1.516). In terms of previous literature, one study found that school police presence did not adversely influence the safety of children (Owens, 2017); however, this must be taken into context of most contemporary criminology literature finds that school police presence is not favorable on student safety or pushout (Devlin & Gottfredson, 2018a; George, 2015; Gottfredson et al., 2020; Na & Gottfredson, 2013).

Therefore, it appears that the mental health of Latino boys is mostly affected when school police are present but are not in contact with these boys; however, it appears that the anticipation of being stopped, seeing others stopped, or being disciplined by the school police who are regularly present leads to high depressive scores (see Class 3; M = 7.649). Previous literature on RBF points to experiences of male students of color traversing racially arduous educational environments are compelled to anticipate and ruminate about potential encounters with the police state on or near their schools (e.g., Smith, 2010, 2016; Smith et al., 2016).

Depressive symptoms reported among the three subgroups of adolescent Latino boys were found to have moderate-to-high conditional probabilities of school police presence, yet low-to-moderate conditional probabilities of school police contact. This dichotomy of school policing is telling because this study reveals that both school police presence and school police contact comprise the depressive symptoms among adolescent Latino boys. This finding converges with previous literature, such that school police presence adversely influences U.S. youths (Gottfredson et al., 2020; Na & Gottfredson, 2013).

Thirdly, though it is essential to acknowledge the lived experiences of the boys who had school discipline comprise their depressive symptoms, these boys reported low conditional probabilities of school discipline. This finding runs contradictory to previous scholarship that usually has found that school discipline is associated with depressive symptoms (So et al., 2023), and school discipline comprises high mean scores of depressive symptoms among national samples of minoritized adolescent students (anonymized). Therefore, school discipline needs further unpacking when it comes to the mental health of adolescent Latino boys and even compared to youth with other identities to arrive at best-suited interventions and policies for Latino boys.

Exploring the relationship between school policing, school discipline, and depressive symptoms among adolescent Latino boys towards a multidimensional racial battle fatigue theoretical framework (Arnold et al., 2016; Call-Cummings & Martinez, 2017; Franklin, 2019; Franklin et al., 2014; Gorski, 2019; Mutua, 2013) could highlight pathways and mechanisms to further inquire about school policing and discipline and the depressive symptoms among these boys. Previous research has inquired about Latinx people and their educational experiences through the lens of RBF (e.g., Call-Cummings & Martinez, 2017; Franklin et al., 2014). Another health theoretical framework that should be considered more among education scholars is the theory of the diminished return, which explains and underscores how institutions like education, which are commonly known in public health literature as health resources, do not always provide the expected return of sustainable health (for review, see Assari, 2014, 2018, 2020; Assari et al., 2018, 2020).

Limitations

Though my study brings to light the unique experiences of adolescent Latino boys through novel methods, there are points for pause. First, my study is cross-sectional, and no causal inference can be inferred. Using a person-centered longitudinal method, a latent transition analysis would allow for observing subgroup changes over time. Second, FFCWS provided many yes/no questions, which made it difficult to find more nuance. Future data collection for national studies should consider more response items for their measures. Furthermore, questions about the race and gender of the school police would be helpful; it would also be beneficial to have the race and gender of the referring educators and adjudicating education officials. Third, the sample size of my study was smaller than I would have preferred for a nationally representative study. Smaller sample sizes in LCA could mean skewed fit statistics, less-nuanced subgroups, and fewer subgroups, which is not ideal for the comparative process of LCA studies.

Strengths

While some points provide pause, this study has many strengths, which I provide here. First, this study explores the relation between school policing, school discipline, and depressive symptoms among adolescent Latino boys. This study, therefore, provides researchers, educators, parents, and policymakers with a place to explore more about this all-too-often unsung population of adolescent male students. Second, this study draws on the data availability of the FFCWS, which provides questions about educational actors like school police, educational policies like school discipline, and mental health measures like the CES-D 5—which are difficult to find in one, nationally representative study. Having these variables in one study reduces methodology issues, as well as providing new insights into the long-studied relationship, and narratives, about the education-health relationship, especially among Latino boys. Third, this study prompts scholars to rethink how we think about education and its relationship to health. For example, rather than treating school as a universally protective environment, this study demonstrates that the presence of school policing and school discipline can themselves produce adverse mental health outcomes among Latino boys.

Finally, this study boasts a sample exclusively of adolescent Latino boys, which to divest from perpetuating false narratives about adolescent Latino boys and highlight where mental health problems are endemic to educational institutions; and furthermore, by centering the voices of adolescent Latino boys poises their voices, physical and emotional presence, and agency to tell their stories and live outside of the confines of educational institutions and national studies that often suppress the experiences of adolescent Latino boys.

Recommendations for Future Research

It is essential to speak to the police state that school children have been compelled to become accustomed to, and my study not only supports this but also finds that even though the presence of school police is familiar, it is influencing the mental health of Latino boys no matter the level of depressive symptoms. Becoming accustomed to the police state and school policing would be a research trajectory worth exploring in future studies, from the students' perspective. Qualitative interviews for this line of inquiry would be an advantageous place to start, so as to make sense of the duality of becoming accustomed to school police, feelings about school police, on the one hand, and the health and wellbeing of adolescent Latino boys on the other hand.

Conclusion

This study sought to understand the nuanced relationship between school policing, school discipline, and depressive symptoms among adolescent Latino boys—an all-too-often overlooked group of male students. Previous research engaged in questions about the social, economic, and health outcomes among youths in the United States; however, this extant body of work did not delve into the unique experiences of adolescent Latino boys as it pertains to being policed and socially controlled in their own schools, using a nationally representative data set. Generally, it was found that low amounts of school police presence, moderate amounts of school police contact, and high amounts of vicarious school police contact comprise high levels of depressive symptoms among adolescent Latino male students (Class 3: $M = 7.64$). Future work should observe these findings longitudinally and with a larger sample size of adolescent Latino boys. Both educational and health policies should be designed and written, so educators act in a way that understands the unique academic and health needs of adolescent Latino boys.

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Attendance Counts: Estimating the Financial Impact of an Attendance-Based School Funding Model in Texas After the Pandemic

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Attendance Counts: Estimating the Financial Impact of an Attendance-Based School Funding Model in Texas After the Pandemic

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Abstract

Equitable school funding is critical for ensuring that all students, regardless of socioeconomic background, have access to quality education. This study examines the impact of Texas's attendance-based school funding model on district budgets, focusing on high-need districts serving economically disadvantaged students. Using data from 2017 to 2024, the analysis highlights how pandemic-related absenteeism disproportionately exacerbated funding inequities in these districts. While compensatory funding weights aim to support disadvantaged students, attendance penalties often negate their intended benefits, leading to budget shortfalls, school closures, and larger class sizes. The findings underscore the need for policymakers to consider alternative funding models that prioritize financial stability and ensure equitable resource allocation across all districts.

Keywords: Finance, Attendance, COVID-19

Introduction

School funding models play an essential role in shaping educational access and equity for students of different backgrounds. Throughout the United States, states use a variety of approaches to allocate educational funds to K-12 public schools. Nationally, there are two primary state-level school-funding mechanisms: those that rely on student enrollment and those that account for student attendance in state funding formulas. The choice of funding model can significantly impact school district funding within a state. Attendance-based models, that allocate dollars based on the number of students present at school each day, may incentivize student attendance but also risk penalizing districts for circumstances beyond their control. This concern is especially relevant for high-need school districts serving a large proportion of economically disadvantaged students, where transportation, health, and poverty-related challenges contribute to higher rates of chronic absenteeism.

The COVID-19 pandemic heightened challenges associated with school absenteeism, interrupting school routines and worsening student mental health, leading to significant declines in student attendance for nearly all school districts across the country years later (Swiderski et al., 2024). Under an attendance-based funding model, school districts face significant resource constraints, especially in districts serving a high proportion of low-income students that have experienced larger increases in chronic absenteeism (Malkus, 2024). In Texas, where education funding employs an Average Daily Attendance (ADA) methodology, post-pandemic increases in absenteeism raise concerns about inter-school district funding allocation and sustainability for school district budgets.

This study explores how the attendance-based school funding model in Texas affects district funding, seeking to understand how post-COVID-19 attendance declines have impacted districts of varying need levels. By analyzing the estimated per-pupil funding levels from 2017 to 2024, this study addresses the resource burdens experienced by high-need school districts and the extent to

which attendance-based funding models exacerbate existing inequities. The findings aim to inform policymakers and school administrators about the potential consequences of an attendance-based funding system and to propose more fair policy alternatives in a post-pandemic landscape, ensuring adequate funding for public schools while still prioritizing student attendance.

Background

Legal Actions on School Funding Disparities

School funding disparities between students from high-income and low-income families have been a concern for decades. In the 1970s, California's *Serrano v. Priest* decision determined that relying primarily on local property taxes to fund schools violated the Equal Protection Clause of the California Constitution, as it allowed a community's wealth to determine its educational resources (1971). This landmark ruling spurred a nationwide reevaluation of state school funding systems, prompting efforts to equalize spending and ensure more equitable access to education for students from diverse socioeconomic backgrounds.

Even as recently as 2023, courts declared that Pennsylvania's school funding formula was unlawful, finding that it left students in the state's lowest-wealth districts with substantially fewer resources than those in wealthier communities (The Public Interest Law Center, 2023). Cases like these, along with many others nationwide, have affirmed that funding models creating significant disparities between students of different socioeconomic backgrounds are largely unconstitutional (Stanford University, n.d.). Within this broader national context, Texas has been at the center of some of the most consequential school finance litigation.

In Texas, the 1989 *Edgewood Independent School District v. Kirby* case marked the first successful legal effort to equalize school funding across the state. Similar to California's *Serrano v. Priest* decision, the Texas Supreme Court ruled that the state's school finance system, which relied heavily on local property taxes, violated the Texas Constitution's mandate for an "efficient system of public free schools." In response, Texas increased its basic allotment, standardizing the state-guaranteed per-pupil funding, and implemented the controversial "Robin Hood Plan." This plan, also known as recapture, required wealthier districts to redistribute funds or property to poorer districts or, in some cases, consolidate with them (Paloma Acosta, 2020). Despite these reforms, ongoing concerns about equity and adequacy suggest that Texas's school funding system continues to produce uneven outcomes for students.

School Funding Models

Since the 1970s, nearly all states have enacted legislation aimed at addressing disparities in school finance (Lovenheim & Turner, 2017). Today, states employ a variety of methods to allocate funding to K-12 schools in combination with federal funds, all of which are based on per-student funding. However, the approach to counting students for funding purposes differs significantly. Some states use a simplified method, determining funding based on student attendance or enrollment on a single day early in the school year. Others utilize more complex strategies, such as tracking attendance or enrollment across multiple days or periods (Kring Villanueva, 2024).

In recent years, there has been increasing recognition of the relationship between student attendance and longer-term student outcomes (Aucejo & Romano, 2016; Gershenson et al., 2017; Gottfried,

2010). To promote higher attendance, many states have implemented attendance-based funding methods, such as Average Daily Attendance (ADA), which calculates funding by averaging student attendance throughout the year. As of 2024, six states—California, Idaho, Kentucky, Missouri, Texas, and Mississippi—utilize ADA. In contrast, 23 states rely on Average Daily Membership, which is based on student enrollment counts rather than actual daily attendance and therefore does not directly tie funding to whether students are present in school (Kring Villanueva, 2024). This distinction has important implications for funding equity, as ADA-based systems reduces funding in districts with lower attendance rates. For this reason, some states, such as Washington, have opted against attendance-based funding, citing concerns that it could disproportionately harm low-income communities and that districts may have limited control over attendance (Ely & Fermanich, 2013). At the same time, some correlational evidence suggests that attendance-based funding systems may offer modest benefits, such as higher graduation rates and reduced dropout rates, though their impact on academic achievement remains inconclusive (Ely & Fermanich, 2013).

Attendance-Based School Funding

While attendance-based school funding models may incentivize districts to improve student attendance, they also risk exacerbating the funding disparities that equity-oriented school finance legislation aims to address. This may be especially true for high-need school districts, as they often suffer from lower attendance rates (Garcia & Weiss, 2018; Suso et al., 2021). These models can lead to substantial financial deficits for struggling districts. For example, the El Paso Independent School District in Texas lost over $2 million in state funding during the 2023-24 school year due to high absenteeism rates at just one high school campus (Baltazar, 2024). High-poverty districts often bear disproportionate impacts, as evidenced by the Kansas City, Missouri School District, where poverty and race accounted for 59% of attendance variation. This disparity resulted in funding losses more than double the average district's losses when comparing financial differences between enrollment-based and attendance-based funding (Green & Baker, 2006).

In response to attendance-based funding models, school districts have implemented various strategies to boost attendance and, consequently, increase their budgets. These include collaborating with legal authorities, issuing fines to parents for student absences, and making personal calls to families of absent students (Silverstein et al., 2011). Some districts have also experimented with attendance rewards, though these have shown limited success and can sometimes backfire by undermining attendance norms (Robinson et al., 2021). While these strategies reflect districts' efforts to adapt, they do not resolve the underlying challenges created by attendance-based funding systems.

Attendance-based funding models pose significant challenges for school districts, including financial unpredictability and administrative burdens. Schools face fixed costs, such as teacher salaries, facility maintenance, and administrative expenses, which remain constant regardless of daily student attendance (Silverstein et al., 2011). When attendance fluctuates, these fixed costs create substantial budgetary shortfalls, as districts struggle to maintain essential operations. Many of these attendance challenges, such as illness or socioeconomic barriers, lie beyond a school's control. Furthermore, attendance-based systems often increase administrative costs, as districts must meet state requirements for daily attendance reporting. This may include hiring many staff members across the district specifically dedicated to attendance reporting or imposing heavy loads on the development and usage of data information systems. For example, Arizona ultimately abandoned its attendance-based funding model due to the high administrative costs associated with these reporting demands (Silverstein et al., 2011).

COVID-19's Impact on Attendance Patterns

Even before the COVID-19 pandemic, significant attendance gaps between students of differing socioeconomic statuses were well-documented (Garcia & Weiss, 2018; Suso et al., 2021). Students from low-income families often face multiple barriers to regular attendance, including health issues, transportation challenges, and other systemic disadvantages (Black & Elgaddal, 2024; Pogodzinski et al., 2022). The pandemic intensified these challenges, as absenteeism rose across all income levels, even after the return to in-person learning, driven by factors such as worsening youth mental health, disrupted school routines, and declining engagement (Swiderski et al., 2024). High-poverty school districts, however, experienced far greater increases in absenteeism compared to their middle- and low-poverty counterparts (Malkus, 2024). Even in the recent years following COVID, attendance did not rebound to pre-pandemic levels. While specific reasons for worsening attendance patterns post-COVID are still theoretical, Malkus (2024) posits that it may be due to an erosion of the culture of attendance and decreased student sense of belonging.

As a result, attendance-based funding models risk disproportionately disadvantaging districts that serve large populations of economically disadvantaged students, particularly in the aftermath of the pandemic. These districts are often considered "high need" because low-income students face a range of structural barriers associated with poverty, including housing instability, limited access to health care, and other challenges that can contribute to lower attendance and increased need for resources to supply academic and social supports (Ladd, 2012). These conditions also may make it more difficult for districts to stabilize attendance rates, further increasing their vulnerability under attendance-based funding systems. Consequently, funding shortages can contribute to school closures in these contexts can lead to staff reductions, loss of resources, and increased class sizes.

Although these models aim to incentivize improvements in attendance, they may exacerbate challenges in high-need districts where attendance is shaped by factors largely beyond district control. Despite these concerns, limited research has examined the financial impacts of attendance-based funding for these districts in the post-pandemic era. As a result, it remains unclear the extent to which these policies contribute to funding disparities or the magnitude of their consequences for affected districts. This gap in the literature underscores the need for further research to understand how post-pandemic attendance trends interact with funding mechanisms and shape inequities for vulnerable student populations.

The Texas School Funding Model

The data from this study are based on Texas public schools. Although the state's school funding system is complex, its structure can be summarized as follows. Funding for Texas public schools comes from three sources—local property taxes collected by school districts, state funds, and federal funds. These resources are distributed through the Foundation School Program (FSP), which consists of two main tiers. Tier 1 funding provides a basic allotment per student, adjusted through their weighted average daily attendance (WADA) to account for student and district characteristics (e.g., compensatory education, teacher incentive allotment, etc.). Tier 2 provides enrichment funding by guaranteeing districts a set level of revenue per penny of local tax effort above their Tier 1 rate, also calculated on a WADA basis (Texas Education Agency, 2020).

In addition, the system equalizes revenue across districts through recapture, which adjusts for differences in property wealth. Districts whose local property tax collections exceed their Tier 1 entitlement and the guaranteed yields of Tier 2— both of which are calculated based on weighted average daily attendance (WADA)—are considered to have excess revenue. These "recapture" districts return their excess to the state, which reallocates the funds to support districts with less property wealth (Texas Education Agency, 2020). Although recapture itself is based on the relationship between local revenue and district entitlement, those entitlements are determined by ADA-driven formulas. As a result, attendance affects funding levels across all districts through its role in determining funding entitlements under the Foundation School Program, including the calculation of both state aid and recapture obligations.

Theoretical Framework

This study is grounded in Pfeffer and Salancik's resource dependence theory (1978) to understand how attendance-based school funding models influence the financial stability of school districts of varying need levels. Resource dependence theory posits that organizations are influenced by external factors and policies and reliant on the resources provided by outside entities, which in turn shapes their ability to achieve organizational goals. When resources are uncertain or controlled by outside entities, organizations face increased vulnerability and must respond to conditions largely beyond their control.

In public education, attendance-based funding systems create precisely this type of dependence. By tying financial resources to student attendance rates, state policy makes funding contingent on factors that districts can influence only partially and cannot fully control. Absenteeism, shaped by community health, transportation barriers, economic hardship, and other external forces, directly affects a district's revenue stream. From a resource dependency perspective, this exposes districts to significant environmental uncertainty, limiting their ability to meet academic goals and plan for long-term financial stability.

These vulnerabilities are felt most acutely in high-poverty districts, which tend to experience higher rates of absenteeism due to structural disadvantages. Attendance declines during and after the COVID-19 pandemic further intensified these pressures, disproportionately destabilizing districts serving higher-need populations. In Texas, where state policy makes school districts heavily reliant on attendance-based funding formulas, this dependence heightens the challenges districts face in achieving their educational objectives and maintaining predictable budgets.

By examining how attendance-based funding shapes districts' access to resources and amplifies financial disparities, this study uses resource dependence theory to illuminate the structural constraints embedded in Texas's funding system and to consider alternative approaches that may support more equitable and stable resource allocation.

Methods

This study examines the relationship between attendance-based school funding models and expected funding for school districts with varying levels of need (also called their need status), focusing on how the COVID-19 pandemic has influenced funding under this system. Specifically, the research investigates how absenteeism, exacerbated by the pandemic, is estimated to have influenced the

financial resources of districts. Using data spanning from 2017 to 2024, the study seeks to answer the following research questions:

1. What are the trends in attendance patterns across Texas school districts from 2017 to 2024, and how do these trends differ based on district need levels?
2. What are the expected average per-student funding losses for Texas school districts of varying need levels post-pandemic within an attendance-based school funding model?
3. How is the Texas school funding formula associated with expected differences in resources across school districts of varying need levels, given that attendance-based penalties can diminish the benefits of additional weighted funding?

Attendance trends before and after the pandemic were analyzed using two-sample t-tests and linear regression models. Budgetary losses were estimated using a simplified representation of Texas's school funding formula, informed by Baker's (2014) framework for analyzing how attendance-based funding reduces state allocations. Unlike Baker, who used hypothetical districts to demonstrate funding disparities, this study applies the approach to the full population of Texas public school districts. A linear fixed-effects model was then employed to evaluate how the pandemic is expected to have affected per-pupil funding losses across districts of varying need over time. These estimates do not reflect actual district revenue but instead represent projections based on Texas school district demographics and ADA rates designed to show how state attendance-based funding formulas could alter the resources available to school districts.

Data

The data for this study is drawn from school district-level information in Texas, covering the 2016-2017 through 2023-2024 school years. The data was obtained through the Texas Education Agency's Public Education Information Management System (PEIMS), which includes information on 1,229 unique traditional and charter public school districts over the course of these eight school years (Texas Education Agency, 2024b). District-level data includes total enrollment, attendance counts, and student demographics by various characteristics. For the purposes of this study, I calculated the percentage of economically disadvantaged (ED; students designated by the TEA as receiving free or reduced priced lunch) students for each district and categorized each district into a need status based on the most recent available data from 2024. As shown in Table 1, school districts with 70% or greater economically disadvantaged (ED) students were classified as high-need, districts with 30% or more ED students but less than 70% were considered medium-need, and those with less than 30% ED students were classified as low-need.

Table 1
Descriptive Statistics of Need Status

	N	%
Low-Need (< 30% ED)	169	14.2%
Medium-Need (30 ≤ x < 70% ED)	579	48.5%
High-Need (≥ 70% ED)	445	37.3%

Total	1,193	100.0%

Using attendance data, I also calculated the average daily attendance (ADA) rate for each school district. This was done by dividing the average daily attendance count by the total student enrollment for each school district. For the purposes of this study, school years 2016-2017, 2017-2018, and 2018-2019 were categorized as pre-pandemic, while school years 2021-2022, 2022-2023, and 2023-2024 were considered post-pandemic, as most schools had returned to fully in-person instruction by that time (NCES, 2022).

Analysis

Per-Student Funding Loss

To understand the per-student funding loss among school districts, I estimated pre-pandemic and post-pandemic district funding. The estimated funding loss calculation for the purposes of my research questions is comprised of the following formula:

$$Loss\ Per\ Pupil\ = \frac{Basic\ Allotment\ \times\ Weighted\ Pupils}{Enrollment} \times (\frac{Attendance\ Count}{Enrollment} - 1)$$

In this study, the basic allotment of $6,160 per student was used, which has been the funding amount provided for each student in average daily attendance in Texas since 2019 (Texas Education Agency, 2024a). To ensure consistency and allow for a meaningful analysis of how changing attendance patterns affect school district funding, this same basic allotment rate was applied to years prior to 2019, even though it was not the official rate at the time. This approach enables a comparison of funding across all years included in the study.

In Texas, school districts receive additional funding, known as State Compensatory Education (SCE) or compensatory funding, for students who belong to disadvantaged demographic groups. The funding model assigns extra weights for students in residential treatment, are economically disadvantaged, are experiencing homelessness, or are receiving pregnancy-related support (Texas Education Agency, 2024c). The formula for estimating loss per pupil incorporates this compensatory funding by calculating a weighted pupil count, which adjusts district enrollment to account for students in these weighted categories.

Public district-level data for students in residential placement or those receiving pregnancy-related support was not available, so these categories were excluded from the weighted pupil formula. The number of students in these categories is expected to be small and would likely contribute minimally to overall per-pupil funding. Additionally, for districts with fewer than ten students identified as economically disadvantaged or homeless, the exact number could not be reported due to FERPA privacy restrictions, so a value of zero was used. For economically disadvantaged students, the Texas Education Code assigns weights based on five tiers, ranging from 0.225 to 0.275. The weight applied in this calculation was the median of Tier III (0.25), which was used for all economically disadvantaged students in the district. Since public data on the amount of State Compensatory Education (SCE) funding based on this student characteristic is not available and individual student

addresses cannot be accessed to determine funding levels, this estimate represents the best approximation based on available data.

Only SCE weights were included in the estimated budget calculation, as this funding is intended to close performance and high school completion gaps for educationally disadvantaged and at-risk students through supplemental support. Other categories of weighted funding, such as Career and Technical Education (CTE), special education (SPED), and programs for bilingual education, gifted and talented students, dyslexia, and early education, were not included because they are not central to the research questions.

Thus, using the available data on school district characteristics, the weighted pupil calculation in this estimated funding model is comprised of the following:

$$Weighted\ Pupils = (1 + (\%\ Economically\ Disadvantaged * 0.25) + (\%\ Homeless * 0.275))$$

To examine the impact of the COVID-19 pandemic on funding losses per pupil across districts with varying levels of need, a linear mixed-effects model was used. A linear mixed-effects model is appropriate because the data include repeated observations over years nested within districts, and this approach accounts for both between-district differences and within-district changes over time. By incorporating district-level random effects, the model produces more accurate estimates of how pandemic period and need status relate to funding loss.

The model was specified as follows:

$$Loss\ per\ Pupil = \beta_0 + \beta_1 PP_i + \beta_2 NS_i + \beta_3 (PP_i \times NS_i) + u_j + \epsilon_{ij}$$

In this model, *PP* represents the Pandemic Period, a categorical variable indicating whether the data was collected during the pre-pandemic (2017-2019), pandemic (2020-2021), or post-pandemic (2022-2024) periods. Need Status (*NS*) classifies districts based on their level of need (e.g., high-need vs. low-need). The interaction term allows for the examination of how the relationship between pandemic period and funding loss varies across districts with different need levels. A random intercept, u_j, was included to account for district-level variability in funding loss, while ϵ_{ij} represents the residual error term. This model accounts for both fixed effects (pandemic period, need status, and their interaction) and random effects (district-level variability).

Weight Cancellation

To further estimate the impact of the attendance trends on Texas school funding, I considered how additional funding applied from weighted student characteristics was offset by penalties embedded in the attendance-based funding model. To do this, I calculated the percentage of the additional funding provided for weighted student characteristics that was negated after accounting for attendance from the following formula:

$$\%\ Weight\ Cancellation = Loss\ Per\ Pupil \div \left(\frac{Basic\ Allotment \times Weighted\ Pupil \times \left(\frac{Attendance}{Enrollment} - 1\right)}{Enrollment}\right)$$

A mixed-effects linear regression model was used to assess the percent of weight canceled out by ADA.

$$|Weight\ Cancellation| = \beta_0 + \beta_1 PP_i + \beta_2 NS_i + \beta_3 (PP_i \times NS_i) + u_j + \epsilon_{ij}$$

The dependent variable, *Weight Cancellation*, represents the absolute value of the percentage of additional funding lost due to attendance adjustments. By using regression and mixed-effects models to estimate how pandemic-related attendance changes influence projected funding losses, this analysis applies Resource Dependence Theory (Pfeffer & Salancik, 1978) to show how reliance on state-controlled, attendance-based revenue exposes districts to resource instability.

Findings

Attendance Trends

The first research question examines trends in attendance patterns across Texas school districts from 2017 to 2024, with a focus on how these trends vary by district need levels. Overall, an analysis of attendance trends over the past eight school years reveals a decline in the average attendance rate across all districts. In the pre-pandemic years (2017-2019), the average attendance rate was 91.7%. However, in the post-pandemic period (2022-2024), the average attendance rate dropped to 90.3%.

Table 2
Descriptive Statistics of ADA Rate

	Pre-Pandemic		Post-Pandemic		Difference
Need Level	M	SD	M	SD	ΔM
Low	93.9%	2.8%	92.7%	3.6%	-1.2%
Medium	92.2%	3.4%	90.8%	3.6%	-1.4%
High	90.3%	5.1%	88.8%	4.8%	-1.5%
Total	91.7%	4.2%	90.3%	4.3%	-1.4%

The Welch Two Sample t-test was conducted to compare the average attendance rates before and after the pandemic. The results showed a significant decrease in the mean attendance rate during the post-pandemic period compared to the pre-pandemic period, with a t-value of -13.629 and a p-value less than 0.001. This strong statistical significance indicates a substantial decline in attendance rates following the pandemic.

The analysis of overall attendance trends by year reveals a slight decline in attendance between 2017 and 2019 (pre-pandemic years), followed by significant instability during the pandemic years (2020 and 2021). After the pandemic, there was a continued decline in attendance rates through 2022 and 2023, with attendance stabilizing in the 2024 school year.

Table 3 represents the results of a linear regression model examining the relationship between the pandemic period and district need level on average daily attendance (ADA). The intercept ($\beta = 0.9425$, $p < 0.001$) represents the estimated baseline attendance rate for low-need districts in the pre-pandemic period, corresponding to an average ADA of 94.25%. The results indicate that ADA was significantly lower in medium- and high-need districts compared to low-need districts. Specifically, medium-need districts had an estimated ADA that was 1.99 percentage points lower ($\beta = -0.0199$, $p < 0.001$), while high-need districts had an even greater reduction of 4.17 percentage points ($\beta = -0.0417$, $p < 0.001$). These findings suggest that district-level economic disadvantage is associated with lower student attendance, even after accounting for pandemic effects.

Table 3

Regression Results for ADA by Pandemic Period and Need Status

Need Level	Estimate	Standard Error	t-Value	p-Value
Intercept	0.9425	0.0013	743.14	<.001***
Pandemic Period (During)	-0.0132	0.0011	-11.95	<.001***
Pandemic Period (Post)	-0.0141	0.0010	-14.35	<.001***
Need Status (Medium)	-0.0199	0.0013	-15.37	<.001***
Need Status (High)	-0.0417	0.0013	-31.15	<.001***

Note. Significance codes: ***p < .001

The pandemic period also had a significant relationship to attendance rates. During the pandemic, ADA declined by approximately 1.32 percentage points ($\beta = -0.0132$, $p < 0.001$) compared to the pre-pandemic period. Notably, attendance remained suppressed in the post-pandemic period (2022–2024), with an estimated decline of 1.41 percentage points relative to pre-pandemic levels ($\beta = -0.0141$, $p < 0.001$). This suggests that pandemic-related disruptions had a lasting influence on student attendance.

Overall, the results highlight that high-need districts face the most significant attendance challenges, with consistently lower ADA rates. Although attendance rates were higher pre-pandemic, there is no evidence of substantial improvement post-pandemic, further emphasizing the disproportionate impact on vulnerable school districts. When examining the data by year, it becomes apparent that the attendance gap between high-need and low-need schools has widened over the past three years, with the gap increasing by almost half a percentage point in just the last two years. For instance, in 2022, the attendance rate difference between high-need and low-need districts was 3.6%, while by 2024, this difference had grown to 4.0%. This widening gap could translate into millions of dollars in funding disparities, highlighting the financial challenges faced by districts with higher levels of student absenteeism.

Per Student Funding Loss

To assess the budgetary influence of the attendance-based funding model, I calculated the per-pupil funding loss before and after the pandemic. Prior to the pandemic, the average estimated per-pupil funding loss due to attendance-based penalties was $398 for low-need districts, $554 for medium-need districts, and $716 for high-need districts. After the pandemic, the expected per-pupil funding loss increased for all districts due to continued attendance declines. Specifically, funding was estimated to decrease by an additional $85 for low-need districts, $94 for medium-need districts, and $121 for high-need districts. This represents an almost 50% higher increase in per-pupil funding losses for high-need districts compared to low-need districts. Post-pandemic, high-need districts were estimated to lose 73% more in per-pupil funding than low-need districts due to the ADA policy ($837 compared to $483). These losses equate to 13.6% of the basic allotment ($6,160) for high-need districts and 7.8% for low-need districts.

Table 4
Funding Loss after the Pandemic by District Need Status

District Need Level	Pre-Pandemic Per-Pupil Funding Loss (Estimated)	Post-Pandemic Per-Pupil Funding Loss (Estimated)	Change in Funding Loss	% of Basic Allotment Lost
Low-Need Districts	$398	$483	$85	7.8%
Medium-Need Districts	$554	$648	$94	10.5%
High-Need Districts	$716	$837	$121	13.6%

Table 5 presents results from a linear mixed-effects model examining per-pupil funding losses across district need levels and pandemic periods. In the pre-pandemic period, low-need districts had an expected average funding loss of $412.38 per pupil ($p < 0.001$). Following the pandemic, these expected losses increased by an additional $73.42 per pupil ($p < 0.001$) for all district types, reflecting a worsening financial strain. Medium- and high-need districts were projected to face significantly greater funding losses due to attendance-based funding models than low-need districts even before the pandemic. Specifically, medium-need districts have an expected loss of $145.06 more per pupil ($p < 0.001$) than low-need districts, while high-need districts were expected to lose additional $316.59 per-pupil loss ($p < 0.001$). Notably, after the pandemic, high-need districts are projected to experience a further financial loss of $49.54 per pupil ($p < 0.001$), exacerbating their already greater funding losses. These findings indicate that high-need schools were expected to experience the greatest financial strain both before and after the pandemic, with post-pandemic funding losses deepening disparities in school funding.

Weight Cancellation

A descriptive analysis of the percentage of weighted funding canceled out by district attendance shows that, prior to the pandemic, school districts on average lost an estimated 78% of the additional State Compensatory Education funding due to attendance-related funding losses. After the pandemic, this loss was expected to increase substantially by 23 percentage points, resulting in a

total cancellation of 102% of the weighted funding. This suggests that, on average, the ADA funding model completely negated the additional compensatory funding for school districts post-pandemic.

While low-need school districts were estimated to experience the highest percentage of weighted funding cancellation post-pandemic (238%), the resource impact is likely less significant due to the relatively small number of students receiving this weight and, therefore, the lower overall amounts of compensatory funding. In contrast, high-need school districts saw a lower percentage of estimated funding cancellation post-pandemic (76%). However, because a larger proportion of their students rely on this additional funding, the loss is likely to have a more substantial impact on daily operations and student support.

The linear mixed-effects model examining weight cancellation aligns with the observed patterns in funding losses. In the pre-pandemic period, low-need districts were estimated to experience an average weight cancellation of 194% of their weighted funding ($p < 0.001$). Post-pandemic, expected weight cancellation increased by an additional 45 percentage points for low-need districts ($p < 0.001$), indicating a greater proportion of weighted funding being negated by attendance penalties. Medium- and high-need districts experienced significantly lower estimated weight cancellation than low-need districts before the pandemic, with medium-need districts having 122 percentage points and high-need districts 124 fewer percentage points of weight cancellation ($p < 0.001$ for both). While weight cancellation increased post-pandemic, the expected magnitude of this increase was less pronounced for medium- and high-need districts. Compared to low-need districts, post-pandemic weight cancellation was an estimated 33 percentage points lower for medium-need districts ($p < 0.001$) and 36 percentage points lower for high-need districts ($p < 0.001$). These results suggest that, although weight cancellation overall increased after the pandemic, medium- and high-need districts likely experienced comparatively smaller increases in weighted cancellation proportions, but higher cancellation levels in real funding levels.

Table 5

Mixed-Effects Estimates of Per-Student Loss and Weight Cancellation

	Loss Per Pupil Model		Weighted Cancellation Model	
Fixed Effects	Estimate	SE	Estimate	SE
Average for Low-Need Districts	-412.38***	21.88	1.94158***	0.18
Pandemic Period (Post)	-73.42***	10.09	0.44886***	0.05
Need Status (Medium)	-145.06***	24.83	-1.22170***	0.20
Need Status (High)	-316.59***	25.61	-1.24343***	0.21
Post*Medium	-18.67	11.45	-0.32658***	0.06
Post*High	-49.54***	11.85	-0.36367***	0.06

Note. SE = Standard Error, SD = Standard Deviation, *p < .05, **p < .01, ***p < .001.

Discussion

For decades, educational advocates and policymakers have sought to reform school funding models to promote more equitable resource distribution across public schools, regardless of the student populations they serve. As a result, most states now rely on funding models that emphasize some form of centralized resource distribution, making school districts highly dependent on external conditions and policy decisions (Lovenheim & Turner, 2017). Resource Dependence Theory (Pfeffer & Salancik, 1978) suggests that when organizations rely on resources controlled by outside entities, their stability is shaped heavily by those external structures. Although Texas incorporates need-based allotments intended to support districts serving high concentrations of economically disadvantaged students, the findings from this study suggest that reliance on student attendance may inadvertently undermine these efforts in ways that constrain districts' access to stable and adequate resources.

Results from this analysis indicate that Texas' attendance-based funding model is associated with funding reductions for nearly all school districts due to declines in student attendance rates, even before the pandemic. Across the sample, districts have an estimated increased loss in per-pupil funding between $398 to $716 prior to the pandemic. Consistent with Resource Dependence Theory (Pfeffer & Salancik, 1978), these findings illustrate how districts are vulnerable to resource fluctuations tied to factors outside their direct control. High-need districts, which enroll the largest shares of economically disadvantaged students, appeared to face the greatest funding losses; even before the pandemic, they lost an estimated $318 more per pupil than low-need districts as a result of lower average daily attendance rates.

The COVID-19 pandemic further disrupted school routines nationwide, and even years after reopening, most districts continue to experience attendance rates well below pre-pandemic levels. Statewide attendance averaged 1.41 percentage points below pre-pandemic levels in 2022–2024. This rise in chronic absenteeism is expected to have deepened budgetary shortfalls for schools. This study demonstrates that high-need districts face disproportionate funding losses after the pandemic, exacerbating inequities in educational funding across the state. Moreover, compensatory funding intended to provide additional resources for these districts is largely negated by the attendance-based funding model, effectively canceling out the potential benefits of these targeted resources.

These funding pressures occur in a broader context of rising financial strain for school districts across the state. High rates of inflation have driven up the costs of land, school resources, and labor, while the state's basic allotment has remained stagnant since 2019. Coupled with additional unfunded state mandates and unstable enrollment, schools are struggling to maintain operations (Lorena Silva, 2024). For example, heading into the 2024-2025 school year, 19 of the 22 school districts in Central Texas reported budget deficits (Fogel et al., 2024). In response, districts have taken drastic measures to reduce costs. Manor Independent School District, for instance, located near Austin, faced a nearly $21 million budget deficit and decided not to open a newly built elementary school due to insufficient resources to sustain its operating budget, including teacher salaries. Other districts have implemented staff cuts, increased class sizes, reduced technology spending, canceled salary increases, and turned to external funding sources (Fogel et al., 2024).

While these financial challenges are likely the result of many intersecting factors, the findings from this study suggest that financial resources lost from attendance-based funding formulas may have a strong influence on the financial instability of school districts across Texas. From a Resource

Dependence Theory perspective (Pfeffer & Salancik, 1978), attendance-based funding increases districts' dependency on external conditions—such as student mobility, health disruptions, and socioeconomic disadvantage—that are not fully within their control. As a result, high-need districts appear to be more exposed to funding uncertainty, exacerbating disparities in resource availability across the state.

Implications for Policymakers

This study highlights how Texas' attendance-based school funding mechanism likely contributes to the severe budget deficits faced by school districts across the state. To ensure the financial stability of public education, policymakers should consider revising the school funding formula. A key recommendation is transitioning to an enrollment-based funding model, which allocates funds based on the number of students enrolled rather than those attending daily. This could be implemented using a single-day count, multiple-day counts throughout the school year, or average daily enrollment.

The advantages of an enrollment-based model include enabling districts to more accurately project their budgets and avoiding penalties for attendance issues beyond their control. For high-need districts, such a model would mitigate the disproportionate impact of chronic absenteeism and provide resources to address its root causes. Additionally, enrollment-based funding significantly reduces administrative costs, as it requires fewer resources for attendance reporting and monitoring. This approach offers a more equitable and sustainable solution to funding public education in Texas while allowing schools to focus on improving student outcomes rather than managing financial uncertainties tied to attendance.

Advocates argue that attendance-based funding systems incentivize schools to prioritize student attendance and improve outcomes, whereas enrollment-based systems provide weaker accountability incentives. However, complementary policies and school-based strategies can effectively promote attendance under an enrollment-based funding model. For instance, state lawmakers could mandate the adoption of early warning systems paired with evidence-based interventions to identify and support students at risk of chronic absenteeism (Faria et al., 2017). Additionally, states could allocate targeted funding to districts with high rates of absenteeism, specifically for mentoring or attendance coaching programs. By increasing financial support to struggling districts, schools would gain the resources necessary to address the underlying causes of absenteeism rather than facing severe funding cuts. Alternatively, tying attendance into the accountability system rather than the funding system could be an effective way to continue encouraging attendance across school districts without directly penalizing them financially.

Although this study focuses on Texas, the findings and policy recommendations have broader implications for any state using attendance-based metrics in their school funding formulas. States such as California and Kentucky also tie funding allocations to average daily attendance (Kring Villanueva, 2024), which similarly disproportionately impact districts with high absenteeism—often those serving low-income and minority communities. These funding models inadvertently exacerbate existing inequalities, as high-need districts face systemic barriers, such as poverty, unstable housing, and limited access to healthcare, that contribute to lower attendance rates (Black & Elgaddal, 2024; Pogodzinski et al., 2022). The inequities in Texas mirror national concerns about the fairness and adequacy of attendance-based funding systems in addressing the diverse needs of public schools. Thus, transitioning to an enrollment-based model, combined with strategic

investments in attendance improvement initiatives, could provide a more equitable and effective approach to funding public education across the United States.

Limitations

Although this study seeks to understand the influence of attendance-based funding models on school district budgets, it has several limitations. Primarily, the analysis does not incorporate all funding variables, focusing instead on the basic allotment and state compensatory funding. Moreover, the weights for economically disadvantaged students were estimated due to the unavailability of data on individual students or district-level compensatory funding allocations. While the model does not account for recapture allocations, Texas' recapture system may also intensify fiscal challenges for medium or high-need districts. Because recapture calculations include average daily attendance in determining a district's wealth per WADA, attendance declines can artificially increase a district's reported property wealth even when its actual financial capacity has not changed. For districts where attendance barriers are more prevalent, this mechanism may further limit access to stable funding, thereby amplifying existing resource disparities. As a result, this analysis offers a simplified and illustrative representation of how the ADA funding formula affects school districts with varying need levels across Texas, rather than a precise calculation of their funding distributions.

Despite these limitations, the findings remain significant, highlighting how attendance-based funding disproportionately impacts per-pupil funding losses in districts serving higher proportions of economically disadvantaged students. This underscores the inequities embedded in the current funding model and emphasizes the need for policy interventions to address these disparities. Future research in this area could enhance these claims. For example, researchers could seek to obtain additional funding variables, like Federal Title I funding, precise allocations of compensatory funding per district, or recapture distributions to come up with a more precise estimate of the budgetary impacts of attendance-based funding models on districts of varying need levels. Additionally, further research could examine the impacts of funding deficits on student achievement.

Conclusion

This study explored the effects of Texas's attendance-based school funding model on educational resources, particularly for districts with varying levels of need. By examining the impact of increased absenteeism following the COVID-19 pandemic, the findings reveal that nearly all school district budgets across the state have been adversely affected. High-need districts—those serving significant populations of economically disadvantaged students—bear the brunt of these impacts, as they often experience higher rates of absenteeism due to systemic challenges beyond their control. While Texas provides additional compensatory funding to support disadvantaged students through weighted funding formulas, the attendance-based funding model undermines much of this effort. The result is a cancellation of critical funding that these districts depend on to address inequities.

The consequences of these budget shortfalls are profound, forcing districts to close schools, reduce staff, and increase class sizes—measures that can further exacerbate educational disparities (Fogel et al., 2024). In conjunction, taxpayers have felt the brunt of this policy, as school districts have had to raise additional funds through bonds. These findings highlight the urgent need for state policymakers to reconsider attendance-based funding mechanisms. Adopting alternative models that prioritize enrollment-based approaches and implementing research-based strategies to encourage

attendance could help ensure financial stability and promote resource fairness across all districts, particularly for those serving the most vulnerable student populations.

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DEI Under Attack: Examining the Implications of SB 17 on Texas Higher Education Institutions

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Abstract

This manuscript analyzes the interpretation, implementation, and impact of Senate Bill 17 (SB 17) on Texas public higher education. SB 17 is one of many national efforts by conservative lawmakers and other interest groups to challenge diversity, equity, and inclusion (DEI) programs and policies in higher education. To better understand this issue, we examined how public research universities in Texas interpreted and implemented restrictive legislation and how institutional changes, particularly affecting marginalized campus members, have occurred due to these interpretations and responses. We found that Texas public university systems issued uneven and often overreaching guidance, closed or reorganized DEI offices and cultural centers, and terminated staff in ways that exceeded the bill's explicit scope, producing chilling effects that threatens campus climate and equity for marginalized communities. As a result of this examination, we provide recommendations for higher education institutions and institutional partners to preserve the values of DEI.

Keywords: political interference; diversity, equity, and inclusion; sociopolitical context; chilling effect

Introduction

In February 2023, Texas Lieutenant Governor Dan Patrick announced his top priorities for the 2023 legislative session, some of which included threats directly to higher education (Doane & Unda, 2023). These included bills banning Critical Race Theory in higher education, eliminating tenure, and most importantly, prohibiting "discriminatory" diversity, equity, and inclusion (DEI) policies (Lieutenant Governor of Texas, 2023). As the Texas legislature pushed for many bills, Senate Bill 17 (SB 17), authored by Senator Brandon Creighton (R-Conroe), was one of the few prominent bills to make it through the entire legislative process to eventually be signed by Governor Greg Abbott (Wilson et al., 2022). The bill bans DEI policies, programs, offices, and employees, rejects DEI statements across institutional processes, denies preference to any applicants based on social identities, and bans mandatory diversity training. This bill rolls back decades of DEI-focused progress and efforts to intentionally recruit diverse university faculty and staff and ensure educational equity.

SB 17's origins largely come from external influences, notably the Manhattan Institute (MI). MI is a conservative organization with ties to right-wing donors and corporate interests (Center for Justice & Democracy, 2023). As a hybrid research think tank and policy advocacy group, MI is known for producing conservative research pieces and drafting model legislation for implementation by policymakers at national and state levels (Moody, 2023; Shaw 2023; SourceWatch, 2023). Backed by influential donors seeking to push forward a culture-based agenda, the institute played a significant role in the 2023 development of anti-DEI bills, including SB 17 (Moody, 2023). MI put out an issue

brief titled, "Abolish DEI Bureaucracies and Restore Colorblind Equality in Public Universities," which provided a critical framework for conservative figures to push for anti-DEI legislation in post-secondary education (Rufo et al., 2023). While promoting the brief on social media, Rufo stated in a post on X (formerly known as Twitter) that, "[w]e've developed a playbook for state legislators to abolish DEI bureaucracies and restore colorblind equality in public universities. The truth is simple: red states should not subsidize racialist ideology, bureaucratic capture, and the destruction of their public academies" (Rufo, 2023).

Upon the announcement of the novel playbook, the commencement of official guidelines and model legislation campaigns for conservative policymakers pushed forward. Rufo and colleagues' (2023) brief promoted the elimination of DEI policies and encouraged colorblind tactics, and ultimately, reformed higher education by (1) abolishing DEI policies, (2) ending mandatory diversity training, (3) curtailing political coercion, and (4) ending identity-based preferences. As noted in the brief, each of the four proposals includes a rationale and model legislative text for policymakers to fill in the blanks and pass for their respective states. This movement provided the groundwork for legislation to run through the 2023 Texas legislative session that led to the passing of SB 17. After the legislation passed, the next steps in the policy implementation process relied on the various public institutions and school systems to determine how they were going to interpret and implement the new mandatory policies.

The passage of SB 17 led to multiple stakeholders pushing back against the implementation. In August 2023, during a closed meeting session for the University of Texas (UT) Board of Regents, students filled the hallway and chanted, "Ho, ho, hey, hey; diversity is here to stay" (Heath, 2023). During an open session, students from two student organizations, Texas Students for DEI and Texas Students for a Democratic Society (SDS), stood in the back of meeting rooms and held signs that read, "stop attacks on diversity" and "protect multicultural programs" (Heath, 2023). Several months prior, students, university staff, faculty, and organizations (e.g., the National Association for the Advancement of Colored People [NAACP] and the Association of American University Professors [AAUP]) convened at the Texas State Capitol for the 88th Regular Texas Legislative Session. From March to May, these various stakeholders attended Senate and House committee sessions and provided hours-long testimony before the Subcommittee on Higher Education–imploring state legislators to consider the implications of the bill. These events occurred under an increasingly contentious political backdrop with the spread of anti-DEI legislation nationally.

Amid expanding public opposition, state and system leaders moved quickly to formalize how SB 17 would reshape institutional policy. The UT Board of Regents met over a two-day period, which led the leaders to amend Regents Rule 10701 on November 28, 2023: "compliance with laws related to race, color, national origin, ethnicity, religion, sex, age, veteran status, and disability" per the revisions dictated under the recently approved SB 17 (The University of Texas System, 2023). The passage of this bill had immediate aftereffects seen at public institutions across the state of Texas despite universities having until January 1, 2024 to enact policy changes, when the bill officially went into effect. The UT System, Texas A&M University (TAMU), The University of North Texas (UNT), and Texas State University had already made changes or put forward directives for how they planned to be compliant with the new law. However, due to the vague language of the bill, institutions' responses were harsh due to their interpretations of the bill which ultimately led to students, faculty, and staff being harmed in the process. As a result, we aim to review how institutions interpreted and applied SB 17 and how those decisions affected marginalized students, staff, and faculty at Texas public universities.

Problem Statement

Legislation such as SB 17, threaten decades of advancements toward racial progress in U.S. higher education (Briscoe, 2022; Liu et al., 2010; Lozano, 2010; Patton, 2010; Sutton & McCluskey-Titus, 2010). U.S. colleges and universities have struggled to reconcile their complex histories of exclusion, racial discrimination, and violence towards communities of color (e.g., Hutcheson, 2019). However, as institutions have evolved along with their student demographics, they have instituted cultural centers, identity-based curricula, and student support services to promote marginalized students' sense of belonging on campus (e.g., Liu et al., 2010; Lozano, 2010). SB 17's intentionally broad anti-DEI language—which appears similar to other states' iterations of comparable legislation—necessitates a comprehensive understanding of strategic responses to safeguard efforts to advance access, recruitment, and retention of underrepresented students, staff, and faculty as we continue to engage in a more global, diverse society.

Beyond the inevitable long-term consequences that SB 17 will have on Texas higher education lies a compelling opportunity to analyze the various stages within the policy process model (Kraft & Furlong, 2019). Since the bill's introduction, Texas universities have engaged in activities throughout the implementation stage (e.g., (over)interpreting language, (re)organizing offices, applying adjustments and changes across divisions, offices, positions, and laying off DEI employees; Mangan, 2024a; Sanchez, 2024; Srivastava & Dilley, 2024). These institutional activities—both before and after dissemination of institutional guidance—are critical for influencing possible consequences. To further our understanding of SB 17's policy process, we examined how four-year public university systems in Texas (i.e., TAMU, Texas Tech University [TTU], the University of Houston [UH], and UT Austin and Dallas) have interpreted and implemented guidance related to SB 17 thus far. Our research questions are the following:

1. How did public research universities interpret and implement SB 17?
2. What institutional changes, particularly affecting marginalized campus members*, have occurred as a result of those interpretations and responses in 2024?*

While this is not an empirical paper, our findings may explain how university systems understood and responded to vague legislation and the consequences for marginalized communities on their campuses. Moreover, we offer policy recommendations for universities to review since the enactment of SB 17 on January 1, 2024.

Literature Review

This literature review thematically explores the following areas of scholarship to understand the origins and importance of DEI initiatives in US higher education: 1) historical exclusion at historical White institutions (HWIs), 2) the rise of the cultural centers at HWIs, and 3) the institutionalization of DEI in higher education. These areas of scholarships acknowledge the historical and modern implications of DEI efforts in higher education. While HWIs have been sites of exclusion for minoritized students, staff, faculty, the passage of *Brown v. Board of Education* (1964) offered the opportunity for those minoritized students, staff, and faculty to engage on the college campuses. Additionally, this scholarship demonstrates the necessity of DEI offices to aid minoritized students, staff, and faculty in academic, professional, and personal support and development. These specific cultural and identity centers offer minoritized communities a sense of belonging at HWIs, thus,

improving the recruitment, retention, and graduation of these communities. Moreover, the rapid growth of cultural spaces incited the development of DEI offices on college campuses. DEI offices, as opposed to cultural spaces, have a broader mission to support multiple aspects of campus-wide equity. Thus, this literature review reveals the historical necessity of DEI offices and how modern-day universities have benefited from the recruitment of diverse populations.

Histories of Exclusion at HWIs

Through systems of discrimination and genocide, the United States (US) has heavily disenfranchised communities of color in their socioeconomic advancements and educational pursuits (Ash et al., 2020; Hutcheson, 2019; Wilson et al., 2022). Wilson et al. (2022) argued how the United States remains fundamentally shaped by economic, educational, and social inequities that stem from the legacies of slavery, de jure segregation, ongoing discrimination, and institutional racism. Even though some systems of discrimination were abolished (e.g., enslavement, Jim Crow segregation, exclusion acts), these oppressive forces were transformed and implemented in new ways. These broader systemic inequities do not occur in isolation but rather negatively diffuse into different facets of society in the United States adversely impacting marginalized communities.

These systemic inequities have permeated HWIs as these places have a long history of exclusion, discrimination, and elitism (Ash et al., 2020; Briscoe, 2022, 2023; Cook, 2023; Hutcheson, 2019; Hurtado, 1992; Hurtado et al., 1998, Wilson et al., 2022). These oppressive experiences were commonplace as marginalized students, staff, and faculty sought out education during the colonial era. From the 1600s to 1800s, colonial institutions focused recruitment efforts on educating white men while excluding women and Black individuals from access to education (Hutcheson, 2019). Specifically, Black individuals were barred from attending colonial colleges as university leadership did not perceive Black Americans as knowledge producers. Moreover, women were also excluded from admission to these institutions as they were not perceived as equal citizens until they gained the right to vote in the 1920s. Higher education, as Hutcheson (2019) highlighted, was "by its very design... meant to keep some people out" (p. 20). Ultimately, these marginalized populations were forced to find alternative ways for their educational pursuits.

These restrictive barriers to accessing education for underrepresented student populations led to the creation of minority-serving institutions (MSIs) for Black, Native American, and women students (Hutcheson, 2019). However, these institutions were still met with obstacles as they expanded their operations to cater to a growing student body (Cook, 2006; Hutcheson, 2019). For example, historically Black colleges and universities (HBCUs) were frequently faced with politicized interferences, high tensions, threats to their environments, harassment, and manipulation from the Old South. Further, institutional funding was compromised as the state and federal representatives could cut the budgets of these institutions, which could lead to their closure (Cook, 2006). This rapid expansion of higher education led to the high demand for MSIs for marginalized communities. Later in the late 1880s to early 1900s, institutions that served primarily white men, slowly expanded their missions and visions to become coeducational to support the advancement of white men and women (Hutcheson, 2019). However, it would not be until the 1960s, with the passage of the *Brown vs. Board of Education* (1964), that the mandated desegregation of institutions would grant the admission of marginalized students (Ash et al., 2020; Hurtado, 1992; Hurtado et al., 1998).

The passage of *Brown vs. Board of Education* (1964) led to greater educational and social advancements for marginalized students (i.e., low-SES, students of color, LGBTQIA+, students with disabilities,

and veteran students) with increased access to educational opportunities. However, the desegregation of HWIs did not eradicate years of continued oppression and discrimination experienced by these students. Racial tensions on HWIs have been prevalent occurrences on campuses since the 1960s (Briscoe, 2022). Marginalized students navigate hostile racial climates and racialized incidents on campuses. Briscoe (2024) defines racialized incidents as "ethnoviolence, or campus hate or bias incidents that target marginalized individuals and groups, such as hate crimes" (p. 1). These incidents include but are not limited to "overtly [racist] acts such as racially themed parties and culturally racist displays of Blackface photos" (p. 1). Ultimately, these negative interactions have harmful psychological, emotional, and physical impacts on the health of racially minoritized students (Valandra et al., 2024). These experiences are not unique to just students but also to marginalized staff and faculty at HWIs who navigate hostile work environments (Briscoe, 2022; Husband, 2016).

As a result of these negative experiences and environments, minoritized students have found themselves seeking spaces on campus that affirm their unique experiences and identities as they combat difficult and unwelcoming campus climates. Specifically, Yosso et al. (2009) explored the experiences of Latino/a/x students to understand how their plights navigating hostile campus climates can negatively impact their sense of belonging at HWIs. In their study, the participants highlighted the need to "surround [themselves] with people like [them]" in either formal or informal meeting spaces and organizations (p. 677). Yosso et al. (2009) termed communal space as "counter spaces," or spaces outside of the classroom or workplace, which provide marginalized campus members the opportunity to commiserate about their experiences at HWIs and reaffirm their sense of belonging at the institution by convening with each other.

Rise of Cultural & Identity Centers

Cultural centers are at the crux of recruitment, retention, and graduation as their operations curate a positive campus climate for marginalized students, improve student outcomes to ensure graduation from HWIs, and affirm diverse campus members' sense of belonging at HWIs. Historically, the creation of campus cultural and identity centers have been driven by student protests since the 1960s and 1970s (Briscoe, 2022; Liu et al., 2010; Lozano, 2010; Sutton & McCluskey-Titus, 2010). While cultural centers have been observed as "separatist" or "segregated" spaces by white campus members, Liu et al. (2010) described cultural centers as "[places] of inquiry, exploration, and support of various cultural identities" (p. 38) for diverse campus members. Overall, these centers allow marginalized students to grow personally, professionally, and academically among their peers as well as interact with staff and faculty that act as mentors (Liu et al., 2010; Lozano, 2010; Patton, 2010; Shotton et al., 2010).

Researchers highlighted the significance of cultural centers for Asian American and Pacific Islander, Black, Latino/a/x, and Native American students as imperative for student development. Unfortunately, these marginalized populations experience stereotyping (Liu et al., 2010), racism (Briscoe, 2022; Hurtado, 1992; Hurtado et al., 1998; Liu et al., 2010; Lozano, 2010; Patton, 2010; Shotton et al., 2010; Sutton & McCluskey-Titus, 2010), and feelings of cultural domination and ethnic isolation (Lozano, 2010). Ultimately, the demand and support for these cultural centers are evident as they are described as safe havens (Liu et al., 2010; Lozano, 2010; Patton, 2010) and sanctuaries (Shotton et al., 2010) for marginalized students, staff, and faculty.

Cultural centers are more than physical spaces because they provide different resources and offerings catered to marginalized students. These offerings include access to identity-specific curriculum, cultural programming, and mentorship opportunities. Explicitly, identity-specific curricula facilitated by the centers' staff and faculty offer an "intellectual and cognitive space devoted to identity and culture [and the] psychosocial and personal development and explorations of students" (Liu et al., 2010, p. 28). These educational opportunities are critical for the retention of these populations. Finally, mentorship is intrinsically embedded into all cultural center offerings, which include "peer mentoring, peer tutoring, faculty-student mentoring, and alumni-student mentoring" (Lozano, 2010, p. 14). Overall, student outcomes and their collegiate experiences are positively impacted due to the operations and functions of cultural centers.

The Institutionalization of DEI

DEI initiatives at HWIs have become popular for administrations who are interested in attracting more diverse campus members for their institutions (Briscoe, 2023; Briscoe, 2024, Hoffman & Mitchell, 2016; Shorter-Gooden, 2013; Suarez et al., 2018). In the previous section, we describe the creation of cultural centers for the improvement of marginalized students' outcomes and experiences at HWIs; however, these centers tend to focus on students' success and not specifically the unique needs of marginalized staff and faculty. Rather, offices or divisions of DEI serve as program and policy-focused facilitators in support of the institution with values of DEI in mind (Suarez et al., 2018). The institutionalization of DEI offices has resulted in campus leaders appointing specialized roles known as "chief diversity officers (CDOs), whose job it is to lead the university in becoming a diverse, fully inclusive campus" (Shorter-Gooden, 2013, p. 454). These senior leadership roles are charged with improving all major aspects of recruitment, retention, and graduation of marginalized campus members. Overall, these leaders shoulder a substantial role at HWIs in their offices and divisions to influence change in the organizational campus culture.

Moreover, HWIs have made immense strides to support marginalized campus members. Recently, institutions have been praised for their efforts of inclusive excellence through national awards, such as the Seal of Excelencia (Excelencia in Education, 2023) or the Higher Education Excellence in Diversity (HEED) Award (INSIGHT Into Diversity, 2023). These awards highlight how universities demonstrate their commitment to supporting marginalized student populations in their educational pursuits and to valuing diversity and inclusion within their institutions.

Overall, DEI's institutionalization must advance multiple institutional dimensions to ensure that universities and their stakeholders are intentional in improving institutional commitment, access and success, infused programs, and affirming campus climates, as articulated by Shorter-Gooden (2013). These dimensions are demonstrated through the following examples: vision and mission statements (institutional commitment); the recruitment and retention of diverse campus populations (access and success); academic curricula infused with multicultural content (infused programs); and the physical environment, policies, activities, events, and everyday interactions that support DEI (affirming climate; Shorter-Gooden, 2013; Sutton & McCluskey-Titus, 2010; Thomas, 2018). Overall, when university leaders and stakeholders apply these dimensions of diversity and inclusion to achieve inclusive excellence, DEI institutionalization enhances student belonging, development, and learning at HWIs.

Theoretical Framework: Chilling Effect

The chilling effect describes how vague or restrictive policies like SB 17 deter individuals and institutions from engaging in otherwise lawful or permissible DEI activities due to a fear of political scrutiny or institutional consequences. Originating in legal studies (e.g., Antonovics & Sander, 2013; Townend, 2017), the chilling effect framework has been used to analyze how ambiguous laws, such as California's Proposition 209 (Prop 209; Cattelino, 2019), discourage not only explicitly prohibited actions but also permissible efforts to address inequities, as people and institutions overinterpret or weaponize the law in daily practice. In the context of SB 17, this phenomenon is evident as Texas universities have responded with uneven and sometimes excessive compliance, including prematurely closing resource centers, terminating staff, and restricting DEI-related discussions and support, even before the law's official enactment.

We seek to operationalize the tenets of the chilling effect as our theoretical framework as drawn from Townend (2017):

- Tenet 1 – Negative deterrence of expression: The chilling effect represents a deterrence of communication or expression that inhibits the exercise of free speech from low to high levels of severity.
- Tenet 2 – Operation through subtlety and uncertainty: Chilling effects emerge not only through overt censorship but also through ambiguous laws and costly legal challenges that generate fear, uncertainty, and self-censorship.
- Tenet 3 – Inhibition of legally permissible behavior: The chilling effect discourages behaviors that are legally protected, leading individuals and institutions to refrain from speech and initiatives that remain permissible.
- Tenet 4 – Manifestation as direct or indirect/structural: Chilling can be direct (material changes or conscious self-censorship) or structural (banning topics or terms, reshaping communication, or restructuring programs and departments).
- Tenet 5 – Influence on campus climate: On college campuses, chilling contributes to new climates shaped by repeated behaviors and external pressures that cumulatively affect community members.
- Tenet 6 – Performativity of law in practice: Chilling arises from how laws are invoked and interpreted in everyday practice, where vague language and overinterpretation render activities (e.g., cultural graduations, diversity trainings) risky.
- Tenet 7 – Ambiguity and need for specificity: Because the doctrine is often vague and under-interrogated, it demands precise description of the effects, their causes, and the evidence supporting claims.

This chilling climate particularly impacts marginalized students, staff, and faculty, who report increased feelings of isolation, decreased sense of belonging, and a perception that their identities and concerns are no longer valued or protected by their institutions (Briscoe, 2022; Briscoe, 2023; Briscoe, 2024; Hurtado, 1992; Valandra et al., 2022). The chilling effect framework is thus imperative for understanding not only the direct suppression of DEI initiatives but also the broader cultural and psychological consequences (e.g., self-censorship, disengagement, and the erosion of open dialogue) that follow from over implementation of restrictive policies. By analyzing institutional responses through this lens, the paper highlights how SB 17's ambiguity and politicization have undermined progress toward equity and inclusion, threatening both the mission and climate of Texas public higher education.

Methods

We analyzed the institutions' interpretations of SB 17 via the guidelines they published across four major Texas public university systems: TAMU, TTU, UH, and UT. We read each guideline using the chilling effect framework (Townend, 2017) to understand how institutions made sense of and implemented SB 17. For example, UH's decision to prematurely close their LGBTQ Resource Center is indicative of how vague policies like SB 17 lead to institutional efforts that overly restrict otherwise permissible activities. We used this framework to further compare interpretations and responses across the selected institutions.

Data Collection

We conducted this initial research and analysis of the policymaking process in Fall 2023, prior to the official implementation of SB 17 on January 1, 2024. These institutions, from August 2023 to December 2023, enacted changes to their DEI offices and programs. Additional data were collected through a comprehensive review of publicly available documents and media reports from March 2023 to May 2024 as that timeframe aligned with when the bill was proposed to the end of the first academic semester after implementation. Sources included official university communications, policy guidance documents, press releases, meeting minutes, and news articles detailing institutional responses and stakeholder reactions. Secondary data from national organizations such as the AAUP and Campus Pride Index were also incorporated into our findings to provide insights from the faculty perspective and the status of campus inclusivity. This document-based approach enabled triangulation of the data (Merriam & Tisdell, 2016), therefore allowing the holistic capture of institutional actions in relation to the broader sociopolitical context.

Analytical Framework

Our analysis was guided by the policy process model (Kraft & Furlong, 2019), with a focus on the legitimation and implementation stages. The study also employed the "chilling effect" theoretical framework (Townend, 2017), which posits that restrictive legislation can suppress permissible activities and foster climates of self-censorship and disengagement, particularly among marginalized groups. Literature data were inductively coded for broad themes with special attention to the vague statutory language and how it led to divergent interpretations and amplification of chilling effects on campus climates.

Findings

Across the four university systems, TAMU, TTU, UH, and UT each displayed an array of responses during SB 17's legitimation and implementation stages (Kraft & Furlong, 2019). For example, one month after the bill was introduced, TTU updated their recruitment websites to no longer feature direct links to their Division of DEI and Office of LGBTQIA+ websites in April (Rosiles, 2023). While seemingly benign, this adjustment signaled a chilling effect, despite the policy still moving through the legitimation stage of the legislative process. On the other hand, approximately one week after the House voted to approve the bill (May 22, 2024) and two weeks before Governor Abbott signed the bill into law (June 17), the UH system convened a conference on June 1, to discuss the final bill language and to produce a report. Arguably, UH's initiative to interpret and, therefore, outline their interpretations of what is restricted and exempt from SB 17 provided early scaffolding for subsequent system activities. These examples illuminate two concerns regarding policy language

within SB 17 and the university systems' corresponding efforts to interpret, organize, and apply the law (Kraft & Furlong, 2019): 1) universities have developed uneven guidance for implementing SB 17 and 2) their application of the law poses threats to racially inclusive progress for higher education.

Uneven Guidance

Explicit, yet Vague

Since March 2023, legislators, university faculty, university staff, students, and organizations have expressed concern over the bill language of SB 17. While the bill underwent several amendments as it passed through various committees (i.e., Senate Subcommittee on Higher Education, Senate Committee, and House Committee), its final iteration contained a single definition of note: the definition of a DEI office. This definition was subsequently followed by explicit, yet vague language that outlined the duties of a "DEI office" and thus, restricted universities from maintaining offices, positions, mandatory training and diversity statements, and identity-based preferences for protected groups unless permitted by state and federal laws (Texas Senate Bill 17, 2023). In the most basic sense, the bill gave explicit definitions of what constitutes DEI but did not produce explicit instructions on how to reorganize or eliminate institutional programs and departments, allowing leadership to use the vague language of the bill to take their own approach to implementing the new policy. Notably, the bill also featured language that implicitly identified grants or fellowships; academic course instruction; scholarly research or creative work, including dissemination; student organizations; short-term or guest speakers; color-evasive student academic achievement or postgraduate programs or policies; data collection; and student recruitment efforts as bill exemptions.

These particularities posed challenges for Texas university systems as they sought to interpret, organize, and apply the bill. As a result, some systems remained silent (TAMU and UT) while others offered minimal, ongoing communications (TTU and UH) during the summer. Ultimately, three out of the four systems publicly disseminated implementation guidance by September (TAMU and UT) or October 2023 (UH). Presumably, TTU developed implementation guidance, but it is not available to the public.

Stretching

Following the dissemination of each system's implementation guidelines (excluding TTU), each system's interpretations appeared to reiterate explicit aspects of the bill (i.e., definitions of DEI offices, restrictions, and areas of exemption). However, systems also included guidance that stretched the language of the bill—expanding vague aspects (e.g., the permissibility of attending conferences to disseminate scholarly or creative work and celebrating federally recognized identity-based history or heritage months) and consequently introducing other policies, practices, or procedures that were not included in SB 17. For example, UT, UH, and TAMU reaffirmed items such as data collection efforts, student organization activities, and academic course instruction were exempt from the bill. However, guidance stretched aspects such as offering example questions for faculty hiring (UT), permissible diversity statements in course syllabi (UH), and prohibited content for university websites and social media (TAMU, UH, and UT). According to Kraft and Furlong (2019), typically,

> *Executive branch agencies* implement most public policies. The traditional view was that they and their *personnel were nonpolitical administrators* who *simply carried out the will of the legislature* by following the established guidelines, with no say in the policy beyond its execution. This viewpoint, however, is unrealistic and fails to take into consideration the *influence agencies and their administrators have in formulating policy and the discretion they have in its implementation.* (p. 85) [italics added for emphasis]

This suggests that university systems—with support from their general counsel—play an active, rather than passive role, in interpreting policies.

Threats to Progress

Premature Actions

In addition to stretching SB 17, university systems and its actors appeared to be applying aspects of the bill to their institutions before the bill advanced towards the implementation phase. For example, prior to receiving system guidance, the UH's LGBTQ Resource Center posted a sign that read, "In accordance with Texas Senate Bill 17, the LGBTQ Resource Center has been disbanded" in early August (Welch, 2023). Although the university had commented that these actions were taken "prematurely and both offices [including the Center for Diversity, Equity, and Inclusion] are currently still in operation" (Alonso, 2023, para. 2), the offices were closed by the end of August. Similarly, TTU made adjustments such as removing statements of support for LGBTQIA+ identifying students from course syllabi (Rosiles, 2023). Consequently, campuses such as UH and TTU have been removed from the Campus Pride Index (2023), "a benchmark tool" that assesses campus inclusivity for LGBTQIA+ identifying students. While these are just two examples of changes that may pose consequences for marginalized communities on campus, we acknowledge that there are future efforts that aim to illuminate the connection between anti-DEI legislation and campus racial climate (e.g., Education Trust, 2023).

Furthermore, interpretations of the bill, subsequent (re)organizations of offices and positions, and applications of SB 17 have shaped university faculty's perceptions of their institutions. The AAUP (2023a) released survey results that amassed 4,250 responses from faculty members teaching in Georgia, Florida, North Carolina, and Texas that highlighted issues of "faculty morale and retention" considering state interventions in universities. Nearly sixty percent of faculty responses cited concerns with the political climate (AAUP, 2023a). AAUP further disaggregated data into state-specific reports, where Texas' survey amassed 1,900 university and college faculty responses (AAUP, 2023b). According to AAUP survey results, two-thirds (63.3%) of respondents would not recommend prospective out-of-state applicants seek a faculty position in the state of Texas (AAUP, 2023b). Moreover, several of Texas' survey findings demonstrated notable differences from the accumulated report; 56.8% of faculty felt compelled to leave Texas due to the political climate, 48.1% referenced academic freedom, 46.7% of responses cited concerns regarding targets against DEI, and 39.4% mentioned tenure (AAUP, 2023b). In addition, the political climate appeared to have notable effects on faculty recruitment efforts. According to the Texas survey, "51.0% noticed faculty candidates expressing hesitancy in interviews, 48.7% mentioned having fewer applicants, and 43.2% saw a lower quality of applicants, with more than one-fourth of all respondents (25.9%) saying that all three had occurred" (AAUP, 2023b, p. 1).

Overinterpretation of Policy

At UT Austin, the Multicultural Engagement Center (MEC) was closed by January 1, 2024, as it was deemed not viable to comply with the law based on its origins to support and foster an inclusive campus climate for minoritized students at UT Austin (*Welcome to the MEC! - Multicultural Engagement Center*, 2023). The MEC was considered a "hub for student activism and sanctuary for student learning and growth" (De La Garza & Rivzi, 2024, para. 4). Ultimately, the connotation of the center known for its avid support of minoritized student populations could not continue under the purview of SB 17. Moreover, the UT Austin community felt significant tension with the discontinuation of the Monarch Program within the Division of Community and Campus Engagement (DCCE), which had impacted many students who identified as undocumented, mixed immigration status, and Deferred Action for Childhood Arrival students (DACA) at the institution. While this program offered financial and academic support to these student groups, the program's scope and mission were not in violation of SB 17 (McGarth, 2024; Rodrigues, 2024a). Overall, the over-compliance of SB 17 at UT Austin led to more difficulties as DCCE leadership and its staff continued to operate later in the Spring 2024 semester (Dey, 2024; McGarth & Pointer, 2024; Srivastava & Dilley, 2024).

In February 2024, Accuracy in Media, a conservative media group, filmed Texas University employees discussing how their former DEI offices were restructured to follow SB 17. Accuracy in Media journalists pretended to be advocates for DEI and secretly filmed employees at the UT Tyler, TTU, UNT Dallas, and Tarleton State University to ask these employees to discuss how their divisions and units are complying with the new law. Accuracy in Media's intentions was to record these employees admitting how they are navigating the law to continue to do DEI work (Mangan, 2024b; Rodrigues, 2024b). The viral video of these practitioners disclosing the shifts in mission and scope led to these practitioners being suspended from their positions (Mangan, 2024b). The president of Accuracy in Media, Adam Guillette, shared in the video that "highly paid administrators at half-dozen Texas universities bragged to us about how they [ignored] law, [broke] the law, [and circumvented] the law" (Mangan, 2024b, para. 13). The hyper-surveillance of former DEI practitioners at Texas public institutions and closure of many offices revealed that the new law was not enforced well enough in the opinion of the SB 17 bill author, Senator Brandon Creighton.

On March 26, 2024, Senator Creighton shared a formal letter to Texas public university chancellors and regents requesting that university administrations be in "full compliance with this legislation" (Creighton, 2024, para. 2). These letters sent to public Texas administrators resulted in the firing of staff at both UT Austin and UT Dallas in April 2024 in an attempt for universities to illustrate how they complied with the law (Sanchez, 2024; Srivastava & Dilley, 2024). At UT Austin, multiple staff members who were associated with former DEI positions were called to a meeting with Human Resources to learn that their positions were terminated on Tuesday, April 2, 2024 (Srivastava & Dilley, 2024). Following the terminations of approximately 60 staff members, a campus-wide email from President Jay Hartzell articulated that "the new law has changed the scope of some programs on campus, making them broader and creating duplication with long-standing existing programs supporting students, faculty, and staff" (Hartzell, 2024, para. 2). Ultimately, the email stated that the programs and events within the DCCE were discontinued with no mention of the staff terminations. These findings present potential issues regarding the decrease in availability of academic and creative talent for the state of Texas. These findings only capture several of the consequences of SB 17 thus far. As institutions continue to implement and respond to SB 17, it is crucial to provide strategies for institutional leaders to limit and combat over interpretations and restrictive approaches that threaten the value of DEI in higher education.

Discussion

After the Racial Reckoning of 2020, we witnessed several attacks on the P-20 (pre-Kindergarten through postsecondary education) systems through many tactics such as the politicalization of critical race theory (CRT) (Kaerwer & Pritchett, 2023; Vue et al., 2024), book bans (Throne & Stewart, 2025), the overruling of affirmative action (Iftikar & Nguyen, 2024; *Students for Fair Admissions, Inc. v. President & Fellows of Harvard College*, 2023), and now, the spread of anti-DEI legislation across the United States. Ultimately, the progress towards equity in the United States is now stifled due to the conservative backlash in state and federal governments. Moreover, state and government political interference is an inevitable reality that higher education administrations must recognize and prepare for as we witness shifts in our state and federal government priorities. Thus, the findings of this paper (uneven guidance, stretching of the law, premature actions, and over implementations of policy) are not only in alignment with our theoretical framework, chilling effect, but also demonstrates the consequences for the lack of preparation in higher education for this law. The implications of this bill have grave consequences on the future of higher education as the recruitment and retention of minoritized populations are and remain in jeopardy.

The findings of this paper highlight how the chilling effect framework offers a critical lens to understanding SB 17 responses from institutional leadership across Texas's public university systems. Concurrent with Townend's (2017) conceptualization, institutional actions demonstrated a negative deterrence of expression (Tenet 1), particularly in the way institutions prematurely removed DEI centers and resources while silencing identity-affirming content in anticipation of the law's enactment. The legislation's vague and ambiguous nature (Tenet 2) yielded uneven guidance, leading to institutions engaging in varied acts of self-censorship and implementation approaches. More notably, legally permissible DEI activities such as institutional support for student organizations or inclusive programming were suppressed or dissolved entirely, exemplifying inhibition of lawful behavior (Tenet 3). These chilling effects manifested both directly (e.g., office closures, staff terminations) and structurally (e.g., altered hiring practices, decline in faculty's morale), aligning with Tenet 4. The collective consequences of these actions disrupted campus climates (Tenet 5), particularly for marginalized and minoritized communities, while also revealing the law's performativity in everyday institutional decision-making (Tenet 6). In the case of the legislative text, the ambiguous legal language was stretched or overapplied. Lastly, the variation in system-level guidance and enforcement of the bill underscores the necessity for greater specificity and clarity in the policy interpretation to avoid misinterpretations and overapplications (Tenet 7). Taken together, these tenets aid in illustrating how SB 17's chilling effects extend beyond formal compliance to reshape the sociocultural and psychological foundation of higher education – creating new hostile climates of fear, silence, and disengagement from all campus stakeholders that threaten prior institutional commitments to DEI.

Recommendations

The recommendations outlined in this section serve as a starting point for what institutions and other stakeholders can do to uphold the values and spirit of DEI in a sociopolitical climate that aims to dampen it. The proposed recommendations are offered to maintain the spirit of DEI via examining the role of intermediary organizations (IOs) as institutional partners and agents, implementing indirect methods to measure DEI at HWIs, and leveraging institutional policies and goals to support DEI. These recommendations do not capture all that should be done but are steps to preserving DEI in higher education.

Intersectoral Partnerships

Intermediary organizations (IOs) serve as resources to research and advocate on issues that are of interest to the organizations (McDonnell, 2019). For higher education, IOs can assist institutions in conducting research to address critical problems and provide resources to advocate and lobby their organizations' agenda (Kezar, 2021). The relationships that IOs have with other sectors can expand the networks of higher education institutions and their efforts to resist sociopolitical pressures as it pertains to DEI. While SB 17 limits institution's ability to outsource DEI work to third parties, it does not prevent IOs from initiating DEI programs and initiatives that may lead to institutional participation. Some IOs' agendas focus on marginalized student populations (e.g., Excelencia in Education and NASPA's Center for First-Generation Success) in higher education (Excelencia in Education, 2023; NASPA, 2023) and have a vested interest in directing their resources and mobilizing towards combating SB 17. Although institutions are restricted, IOs should seek research, advocacy, and lobbying efforts on behalf of institutions to protect DEI in higher education. Therefore, we recommend that IOs work as institutional agents to bolster DEI in areas where higher education is limited in doing so.

Reimagining Assessments as DEI Work

The second recommendation involves indirect methods to measure and ensure the standards of DEI are implemented in institutions. Although public higher education institutions in Texas will have to remove most DEI efforts, we can still use other factors to implement and measure DEI on campuses. The Council of Higher Education Accreditation (CHEA) developed an institutional-level assessment for the institutionalization of DEI (Cumming et al., 2023). The assessment focuses on certain factors: institutional environment, curriculum, faculty and staff outcomes such as hiring and retention, as well as student outcomes such as admissions, retention, and completion (Cumming et al., 2023). The assessment provides 41 items to measure these factors (e.g., representation of members from various backgrounds in admissions committees, faculty mentorship programs, and culturally responsive curriculum) that reflect and inherently measure different values of DEI. While SB 17 eliminated DEI offices, personnel, and initiatives, the bill does not prohibit institutional leaders from engaging in practices that support inclusion and equity to improve outcomes for marginalized campus stakeholders. Diverse populations will continue to seek enrollment and employment at institutions operating under SB 17; therefore, the legislation calls on administrators to critically examine outcomes for marginalized stakeholders and to identify alternative structures—such as faculty mentorship programs and admissions committees—through which equitable and inclusive practices can be embedded across multiple organizational dimensions. In this way, institutions may sustain DEI-oriented efforts through reimagined and compliant approaches. Therefore, we recommend that Texas institutions use this assessment to ensure the preservation and implementation of DEI values across campuses.

Leveraging Legal and Demographic Mandates to Sustain DEI

The third recommendation highlights how the existing institutional structures, policies, and goals can be used to uphold DEI values and practices. As a federal regulation, higher education institutions are required to follow Title VI of the Civil Rights Act which clearly states that institutions cannot discriminate against individuals based on "race, color or national origin in programs or activities which receive federal financial assistance" (U.S. Department of Education,

2023). Public and, even, private institutions in Texas are required to adhere to these federal regulations to continue to receive federal funding. Although DEI is under attack, institutions still must uphold anti-discrimination policies and practices. Nonetheless, these practices provide fundamental protections that institutions need to uphold and safeguard DEI values.

Moreover, the Texas Higher Education Coordinating Board (THECB; 2023) has outlined a multi-year plan to "build a talent-strong Texas." This plan aims to prepare Texans for the workforce. One of the goals focuses on increasing the attainment of post-secondary credentials for those between the ages of 25 and 64. Relatedly, Texas has a racially diverse population. According to the 2020 Census, the population in Texas is 40% white and the other 60% are People of Color, with Hispanic and Black individuals as the largest populations of color (U.S. Census Bureau, 2021). Therefore, as Texas continues to grow in racial diversity, higher education institutions will have no choice but to adapt and support the unique needs of their Students of Color, regardless of whether these efforts are called DEI or are given another name.

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Introduction to the Special Issue, Democracy Dismantled: Takeover and the Lived Experience of State-Directed Urban School Reform

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Introduction to the Special Issue, *Democracy Dismantled: Takeover and the Lived Experience of State-Directed Urban School Reform*

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On June 1, 2023, the Texas Education Agency (TEA) took over Houston Independent School District (HISD), the eighth largest district in the United States and the largest in Texas. Citing the urgent need to "break the status quo," HISD's state-appointed superintendent, Mike Miles, has since administered a project of "wholescale systemic reform" that has upended longstanding governance procedures, decision-making processes, and school and classroom practices across the district (Miles, as cited in Ortiz & Worthy, 2024). These efforts appear to have boosted campus accountability ratings, but in the process have pushed out thousands of experienced teachers and principals, exacerbated declines in student enrollment, and sparked intense conflict between HISD's appointed leadership and the families and communities they ostensibly serve. The dominant instructional model and professional culture that has emerged in HISD has been described by those subjected to it as highly militarized, as expectations to follow orders and adhere to the established chain of command have superseded educator professional knowledge and autonomy, reduced opportunities for students to develop creativity and curiosity, and eroded the trust of parents and of the broader Houston community (Dawer, 2026).

Miles has been able to exercise this total authority over the district because he answers only to TEA Commissioner Mike Morath. As a political appointee of Texas Governor Greg Abbott, Commissioner Morath unilaterally deposed HISD's elected school board and installed a board of managers, who have abdicated their responsibility to represent the community by voting nearly unanimously to approve all of Miles's policies. Alarmingly, Morath summarily dismissed and replaced four of these managers at the end of the takeover's second year after they asked critical questions or cast rare dissenting votes (Menchaca, 2025). Meanwhile, HISD's elected trustees, who have earned the trust and support of their constituents, have been relegated to subordinate positions and have seen their power reduced to that of ordinary citizens. Without an elected governing body to hold him accountable, Miles has financially benefited from continued dealings outside the district in violation of state law (Mizan, 2026). Consequently, students, parents, educators, and community members in one of the largest predominantly Black and Latine districts in the U.S. have effectively been deprived of democratic power to influence or change the trajectory of their schools.

It is not a coincidence that the racial project of undemocratic educational regime change TEA has pursued in Houston has occurred in parallel with the nation's descent into a period of intensifying authoritarianism (Carpenter, 2026). Over the same period, federal leaders have ramped up the brutal domestic occupation of American cities by Immigration and Customs Enforcement (ICE) and waged an unconstitutional foreign war of choice in Iran that has destabilized the global economy, created an environmental catastrophe, and killed thousands of civilians (Bennhold, 2026; Gibson et al., 2026). Meanwhile, state leaders in Texas have launched the nation's largest private school voucher program while also eliminating diversity, equity, and inclusion initiatives across public K-12 and higher education institutions (Edison, 2026; Edison & Acharya, 2025). These changes have occurred as several southern states, including Texas, have sought to redraw electoral maps to weaken Black voters' electoral power and preserve Republican advantages, and a recent Supreme

Court ruling weakening key provisions of the Voting Rights Act in *Louisiana v. Callais* only threatens to aggravate such machinations (Levine, 2026).

We organized this special issue of the *Texas Education Review* not only to draw attention to the racialized and anti-democratic implications of state-directed reform efforts in HISD, but also to highlight their parallels with ongoing efforts to dismantle democracy and roll back civil rights protections across the country. Prior research on state takeover has drawn attention to the undemocratic dimensions of its implementation, including its long history of anti-Black disenfranchisement and political disempowerment (Morel, 2018) and its tendency to advance unpopular neoliberal reforms that replace community schools with educational marketplaces (Buras, 2011; Lipman, 2011). As we confront an era of increasingly militarized authoritarianism, emerging research has the potential to illuminate how takeover policy, and education reform more broadly, is evolving in response to the shifting social forces structuring contemporary social and political conditions. As observers who can leverage theory to analyze complex situations amid rapidly changing conditions, researchers are uniquely positioned to discern and expose the battle plans takeover leaders are following as they reconfigure education systems toward undemocratic ends. Such scholarship, risky as it may be, can help communities on the ground to stay one step ahead of occupying forces, and can even point the way toward tactics of resistance.

The special issue opens with Cory Brautigam's article, "The Discursive Use of 'the Future' to Mobilize Takeover as a Form of Racial Authoritarian Preemption," which analyzes how HISD's state-appointed superintendent, Mike Miles, discursively constructed a vision of "the future" to justify a project of racial authoritarian preemption. Examining the speech, gestures, and imagery invoked in two public-facing presentations, Brautigam reveals how Miles framed takeover reforms in Houston as necessary vehicles for conveying the district's predominantly Black and Latinx children to an undefined future destination—one that is imminent, fixed, and radically different from the present. This future's apparent inevitability precludes the possibility that students, educators, or communities could act on or change the world, rendering them passive targets of a colonial modernization program administered from above. By exposing how Miles rationalized his centralization of authority, Brautigam shows how racialized discourses of preemption—much like those invoked to justify military strikes targeting so-called "rogue states"—determine whose lives, and futures, matter.

Extending this framing of the HISD takeover as an authoritarian project of racial preemption, Alyssa M. Chessari and Brooke Fousek argue in their article, "Exposing the Cost: Financial Fallout and Community Exclusion Under Takeover," that state-appointed leaders' gradual elimination of fiscal transparency since the takeover aligns with a broader national trend of democratic backsliding. Analyzing the framing and communication strategy HISD leaders have employed for explaining and justifying financial decisions in official documents, board meetings, and press releases, they show how state-appointed leadership appropriated and subtly redefined terms like "transformation," "equity," and "efficiency" to aggrandize their centralization of power, erode democratic norms, and justify the marginalization of community voices. The goal of these efforts, Chessari and Fousek posit, is to remake public education in Texas into an undemocratic institution that elevates the interests of elites over the priorities and values of local communities.

In the third article, "'They're Suffering in Silence': Educator Health and Wellbeing Under Takeover in Houston ISD," Jasmin (Jee Sun) Lee takes readers inside the district's schools and classrooms to illuminate the human costs of takeover reforms. Drawing on 21 in-depth interviews with Houston

educators, Lee documents the physical, mental, and emotional suffering teachers endured as their workplaces underwent drastic shifts. These teachers describe how the takeover produced a professional culture devoid of care, where systematic denial of accommodations for health conditions, pressures to intensify their labor, and policies undermining the formation of trusting relationships with students and colleagues exacted tolls on their individual and relational well-being. Lee's analysis reveals how the authoritarian logic underlying HISD's takeover reforms seeped into the everyday realities of teaching and learning and provides a key explanation for why so many skilled and experienced teachers have left the district over the past three years.

One of those teachers is Sarah Rivlin, author of the special issue's fourth article, "The Broad Academy at Work in the Houston ISD State Takeover." With over a decade of experience in HISD, Rivlin eventually exited the district after teaching for one year under state takeover. Drawing on her lived experience and from a base of critical literature, Rivlin analyzes the disruptive leadership philosophy espoused by the now-defunct Broad Superintendents Academy, where state-appointed superintendent Miles received his formative training. In HISD, Miles has advanced a reform model aligned with key principles of the Broad doctrine, including the intensification of military-style discipline, hyperfocus on standardized testing, attenuation of mental health resources for students and teachers, and weaponization of chaos and churn to defuse community resistance. Yet Rivlin documents how a diverse coalition of Houston educators, parents, and community members has united to oppose the takeover and build power at the grassroots level, providing a vital blueprint for communities as they work to defend the democratic foundations of public education against unprecedented threats.

The special issue closes with David J. Terrazas's editorial, "'The Politics of Caring' on Trial: State Takeovers as the New Face of Subtractive Schooling," which connects patterns of systematic and racialized un-caring that have emerged under the HISD takeover to Valenzuela's (1999) framework of subtractive schooling. Reflecting on the top-down, militaristic, and metrics-focused pedagogical approach enforced by HISD's state-appointed leaders, Terrazas suggests that Black and Latinx students subjected to this instructional model have been deprived of critical opportunities to develop agency and experience deep learning—a new form of subtraction exacted through their schooling experience. The article concludes with an interview with Dr. Valenzuela exploring the origins of the subtractive schooling framework and emphasizes the continued importance of advancing a politics of care in the face of an increasingly uncaring education system.

The pieces featured in this special issue illuminate the coercive and anti-democratic tactics of state takeover at a critical moment in which the authoritarian logics guiding its implementation are intensifying. In several other Texas school districts that were taken over earlier this year, TEA-appointed superintendents and teams of administrators—many of whom served previously under Miles—have replicated key elements of the militarized reform model that has taken root in Houston (Lee, 2026). At the same time, TEA officials have threatened to seize control of other districts found to have facilitated student walkouts protesting ICE enforcement, suggesting that political motives—and not strictly academic or financial justifications—could be invoked as rationales for takeovers in the future (Lee et al., 2026). Given the rapid spread and evolution of takeover policy in Texas, we intend for this special issue to serve as both a material intervention in the broader education reform landscape and to stimulate new questions and wonderings to guide the work of takeover researchers across the country. We would also like to convey our gratitude to Michaela Pernetti, managing editor of the *Texas Education Review*, for her support in shepherding this special issue, and to the full editorial team for their insightful reviews of the pieces included here.

Maria Benzon is committed to building strong, equitable public schools, and she brings that commitment to her work as a Houston ISD Trustee. A graduate of HISD and a parent in the district, she serves on the board of Community Voices for Public Education and on her local PTO. She holds a Ph.D. in Educational Psychology and has spent over 25 years as a teacher, district specialist, assistant principal, and professor. Her research has explored how teachers' beliefs about student motivation shape classroom practice and, ultimately, foster a genuine love of learning. As Assistant Director of Assessment at the University of Houston-Downtown, she treats assessment less as a metric of sorting than as a tool for continuous improvement, one that should drive equity in student learning.

Daniel I. Dawer is a PhD candidate in the Department of Educational Leadership and Policy at the University of Texas at Austin. His research uses sociological methods to understand how educators, students, families, and communities experience and respond to the implementation of accountability-driven education reforms such as state takeover and school turnaround, as well as how schools and communities work together to lead equitable and democratic school improvement.

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The Discursive Use of 'the Future' to Mobilize Takeover as a Form of Racial Authoritarian Preemption

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The Discursive Use of 'the Future' to Mobilize Takeover as a Form of Racial Authoritarian Preemption

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Abstract

State takeovers of local school districts do not, on average, improve academic performance. Yet, in 2023, the Texas Education Agency (TEA) proceeded to take over the Houston Independent School District (HISD) with the stated purpose of improving academic outcomes. Given this incongruence, this paper explores how the discourse employed by those enacting the takeover in HISD reveals what is produced in the process of takeover. Using critical discourse analysis (CDA), I examine the state-appointed superintendent's discursive use of 'the future' to justify, construct, and enact takeover intervention by the state. In his discourse, I find the future is represented as fixed and radically different from the present, requiring takeover actors to authoritatively prescribe processes of schooling so that students, especially Black and Latinx students, will be prepared for this future. The two presentations I analyze, one at the very beginning of the takeover and the other a year later, demonstrate how the HISD takeover is a form of racial authoritarian preemption. This contributes to the literature which argues that takeover produces mechanisms of control over Black and Latinx communities, not improved educational institutions. These findings help clarify the harm of takeover, suggesting that coloniality and supremacist ideology are maintained through takeover, and teaching and learning practices are greatly limited. Given these findings, I suggest educators, students, and communities can collectively bring alternative (decolonial) futures into schooling to expand the potential for teaching and learning where it has been flattened through takeover.

Keywords: racial authoritarian preemption, the future, takeover

Introduction

In June 2023, the Texas Education Agency (TEA), the state agency which oversees public education in Texas, officially took over the Houston Independent School District (HISD). While state takeovers of local school districts – an increasingly common intervention across the U.S. (Schueler & Bleiberg, 2022) – suspend representative democracy by design (Morel, 2018b), the takeover of HISD is particularly striking for the swift centralization of power and the implementation of "whole scale systemic reform" (HISD, 2024). Some states are pointing to the HISD case as a model intervention (e.g., in Tennessee, see Hatch, 2026), yet there is no evidence that takeovers improve student outcomes (Schueler, 2025). Further, critics of takeover show that it disproportionately targets Black and Latinx communities (Cassidy & Nelson, 2024; Morel, 2018b; Welsh et al., 2019b).

In this paper, I use critical discourse analysis (CDA) to examine how the discourses used by takeover actors – those who carry out takeover – justify, construct and enact takeover (Fairclough, 2023). Specifically, I use a critique of the discourses taken up by state-appointed superintendent Mike Miles, the central takeover actor within HISD, as a wedge to understand how takeover is produced (Fairclough, 2017). To analyze Miles's discourse, I apply Sekou Franklin's (2025) theorization of "racial authoritarian preemption," which suggests that race, authoritarianism, and preemption mutually reinforce one another as states interfere in local governance, as is the case with school district takeover. In doing so, I build on scholarship that recognizes the racialized effects and

authoritarian[1] form of takeover (e.g. Buras, 2011; Cassidy & Nelson, 2024; Dawer, 2025; Morel, 2018b; Rogers, 2012; Welsh et al., 2019b). I then extend Franklin's third component, preemption, to analyze how 'the future' is discursively used by Miles. Preemption, as a form of anticipatory action, brings 'the future' into the present with material consequence (Anderson, 2010). By examining how what is to come is spoken about and imagined, I make sense of how the takeover is justified by the superintendent and carried out in the present (Cantó-Milà & Seebach, 2024). I respond to the questions:

1. How are discourses of 'the future' used by takeover actors? What is justified and normalized through these articulations?
2. How do discourses employed by takeover actors reveal racial authoritarian preemption in the process of takeover?

After analyzing two significant presentations where the superintendent shares his vision for the takeover, I find that the takeover of HISD is a form of racial authoritarian preemption animated by a discourse of 'the future.' Takeover actors represent '*the future*' as fixed and radically different from the present. This use of 'the future' is woven into an *authoritarian* discourse demanding fidelity to the prescribed processes in order to prepare for this future. The discourse of *preemption* assumes historical and existing educational practices in the community are not equipped to successfully guide students into the future – as imagined and desired by takeover actors. These are *racializing* discourses that position Black and Latinx students and communities, which make up the majority of HISD, as 'behind.' Failure is anticipated for these communities within this fixed future. The superintendent's use of 'the future' implies that Black and Latinx students will be forever stuck in the past, unable to move into the future, without the guidance of takeover actors.

Literature Review: School District Takeover

School district takeover laws were first introduced in state legislatures in the 1980s and were largely motivated by white[2], suburban backlash to an increase in Black political power in cities (Morel, 2018a). These laws allowed state governments, which already overrepresented white communities (Rayasam et al., 2021), to intervene in the local governance of school districts. This intervention typically involved replacing elected school boards and the superintendents they hired with state-appointed officials.

Since the passage of No Child Left Behind in 2002, most takeovers are justified by the state-defined 'academic failure' of a school district (Welsh et al., 2019a) – typically based on standardized test scores. As such, takeover as a policy tool aligns with the widespread use of neoliberal accountability policies that set students, teachers, schools, and districts in competition against one another by comparing standardized test outcomes (Au, 2015). However, prior research has demonstrated that takeovers, on average, have no positive effects on student achievement when measured by National

[1] I choose to use the term 'authoritarian' in reference to literature that has highlighted takeover as undemocratic, centralizing, and dismissive of community voices. While this is a contested term that other scholars have not relied on, I include it because of the severity with which authority is centralized in the discourse of takeover actors within HISD.
[2] I choose to not capitalize 'white' because I conceptualize it as a racial category primarily constituted through absence. To be clear, I do not mean that white people are somehow without race, but that white racialization is a process of separation and loss that has deadly material effects and produces murderous ways of being. To be white is to *not be* Other. It is to live in the 'loss of sharing' we call 'ownership' (of self and other life), which is fundamentally a *separation* from life (Harney & Moten, 2021). I also use the lower case as a rejection of the supremacy that whiteness always, by definition, claims.

Assessment of Educational Progress (NAEP) scores (Schueler, 2025; Schueler & Bleiberg, 2022), an assessment given to representative student samples at the district level and scaled to make the results comparable over years and across demographic and geographic student groups. Furthermore, considering majority Black and Latinx school districts are more likely to be taken over than majority white districts with comparable academic achievement ratings (Schueler & Bleiberg, 2022), critical scholars suggest takeovers have more to do with asserting control over these communities than supporting the academic performance of a school district (Buras, 2011; Cassidy & Nelson, 2024; Lovell, 2022; Morel, 2018b; Oluwole & Green, 2009; Wright et al., 2020).

Racialization of Takeover

Race operates at multiple levels during takeover. District leadership (i.e. school board members and superintendent) is much more likely to be replaced with state-appointed leaders or completely abolished in the takeover of majority Black or Latinx school districts, compared to majority white districts (Morel, 2018b). Takeovers have predominately targeted districts in cities where there is significant Black political power, decreasing Black political representation by replacing district leaders (Morel, 2018b; Nelson, 2017). While Morel (2018b) finds that some takeovers have seen slight increases in Latinx representation on school boards, this usually still represents a removal of *elected* representation for Latinx communities. Importantly, Black and Latinx representation on the school board can serve as a means for these communities to attain broader political power, make school boards more responsive to the community in majority Black and Latinx districts, and increase community participation in the production of schooling (Morel, 2018b).

Analyses of school district takeovers have additionally demonstrated how white-supremacist ideology animates, and is reinforced by, takeovers (Cassidy & Nelson, 2024). Takeover actors and supporters across contexts have often employed a discourse of white saviorism to justify and construct takeover, suggesting that majority Black and Latinx communities are incapable of producing desired academic outcomes and thus require state intervention to save kids and give them hope for the future (Dawer, 2025; Dumas, 2013; Rogers, 2012). These discourses often rely on the articulation of an 'achievement gap' between white students and their Black and Latinx peers, where takeover is presented as a way to 'close the gap.'

Authoritarian Character of Takeover

The implementation of takeover has underlying authoritarian potential, eliminating democratic structures. For example, takeovers typically replace elected school boards with board members appointed by state actors. Leaders during takeover are officially answerable to the state education agency, not teachers, students, or the district electorate – the people most affected by their governing decisions (Buras, 2011; Morel, 2018b; Rogers, 2012). This clears the path for the singular vision of strongman[3] leaders to be the only authorized way to act, and the introduction of

[3] Strongman is a term that has been steadily increasing in use from 1975-2020 in English language books sampled by Google's Ngram Viewer – about a 4-fold increase over that time period. It typically refers to political leaders who centralize the power of the state within their person and work against democratic structures and practices. I use it in line with this general use and, as a gendered term, to suggest that takeovers extend the patriarchal discourse and structure already associated with the production of schools where 77% of public school teachers are women, 56% of public school principals are women (Taie et al., 2022) , but only 30% of the superintendents in the 500 largest school districts are women (ILO Group, 2025). I do not intend to suggest that a woman could not lead a takeover of a school district

disciplining mechanisms (e.g. shaming, adjusting pay, employment termination) for those who exist outside the rules and regulations of the new regime. For example, Royal and Gibson (2017) argue that teachers implementing culturally relevant pedagogy – a teaching practice that cultivates sociopolitical consciousness and builds on the ways of being and knowing inhabited by the students in the room (Ladson-Billings, 1995) – experience heightened professional risk during takeover due to the introduction of standardized teaching practices and materials alongside an increased use of measurements to 'hold teachers accountable.' The centralized vision during takeover limits the sanctioned teaching practices, extracting schooling from its context and community.

Even when takeover actors attempt to be responsive to the community, the structural changes of takeover make it difficult to build community trust (Fried, 2020). In cases where takeover actors articulate a desire to proceed with a deliberative approach, working with the community to make decisions, they still hold substantive power over the community (Cassidy & Nelson, 2024). They are the sole authority within the district and have the capacity to fire and reassign educators and administrators, close schools, collect and interpret data, and design the budget, among other district-changing actions. For example, Rogers (2012) observed that "people's experiences were rejected as noncredible evidence" (p. 925) by the state-appointed school board during the takeover of St. Louis Public Schools. The board created spaces to listen to the community, but the listening was "political spectacle" (Rogers, 2012, p. 922) where the participation of the community was symbolic and not substantive. The use of power to claim what counts as a relevant fact or as credible data in the decision-making process is central to the authoritarian character of takeover.

Theoretical Framework

'The Future' as a Technology of Coloniality

Scholars have highlighted the important role our relation to the future plays in the decisions we make today, including how we make and value commodities (Doganova, 2024), how we plan our cities (Weber, 2015), and with whom we build community (Komporozos-Athanasiou, 2022). In the Western Modern imaginary, 'the future' gets mobilized as a technology of coloniality, legitimizing preemption, or anticipatory action, for the preservation of whiteness (Baldwin, 2012). Structures of coloniality maintain a hierarchy of ways of being and knowing through the invention and use of race, situating whiteness at the top of the hierarchy (Leonardo et al., 2023). Colonial relations emerge out of historical and ongoing events of colonialism and suggest that human differences make people separable and more/less-human based on those differences (e.g. race) (Silva, 2016). From this, a hierarchy of being has been formed based on one's distance from the notion of the ideal human, imagined as Western and white (Silva, 2016; Wynter, 2003). In this imaginary, one's place in the hierarchy, particularly as closer to or further from whiteness, determines their relationship to the future.

When 'the future' is represented as a place inaccessible to those who have not successfully assimilated into the 'ideal human form,' into Western and white ways of being and knowing, it becomes a tool of coloniality. As a tool of coloniality, this use of 'the future' imagines the global majority – those Fanon (1961/2004) called "the wretched of the earth," the colonized and enslaved

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and facilitate racial authoritarian preemption, wielding the power of the state. Instead, I am noting gendered patterns and patriarchal norms.

peoples who are excluded from the category of 'Human' or who live precariously on the border of this category – to be stuck in the past, to be 'primitive' (Mignolo, 2007). This representation of 'the future' justifies anticipatory action that measures people against the colonial hierarchy and prescribes assimilatory practices for people who have not been racialized as white, suggesting that those who cannot become more like the white Man are not viable for living in the future. Using this theorization of 'the future' in analysis supports the identification of a colonial echo and its productivity within the discourse of takeover actors.

Racial Authoritarian Preemption

Franklin (2025) coined the term *racial authoritarian preemption* to describe the convergence of race, authoritarian practices, and preemptive action within state governance in the U.S. Using Tennessee as a case study, he highlights how these components interact with one another to consolidate power among far-right state officials and disempower cities with large Black and Latinx populations, attacking civil rights and the institutions that protect them. According to Franklin (2025), preemption – like state takeover of a local school district (Cassidy & Nelson, 2024; Morel, 2018b; Welsh et al., 2019b) – usually takes an authoritarian form, consolidating power and reducing or eliminating the influence of the local, disproportionately Black and Latinx, communities on decision making.

Consider the discourse of preemptive military strikes. In February 2026, the U.S. president justified the initiation of military strikes in Iran saying, "The lives of courageous American heroes may be lost, and we may have casualties. That often happens in war. *But we're doing this not for now. We're doing this for the future* [emphasis added]" (Associated Press, 2026). Echoing the discourse employed by the U.S. president in 2003 to justify the military invasion of Iraq, the president claims the military action eliminates a threat that would, in the future, emerge with adverse effects on valued life if not enacted. The determinacy of the future in these calculations is contested – especially by communities living amidst falling bombs – but the decision to strike preemptively is tied to the belief that the actor authorizing the strike can make such a claim on the future.

The construction of authority to make the claim on the future and determine which life is valuable or not is a racializing process. Consider predictive policing technologies that claim to eliminate future crime. Software used to predict who will commit crime depend on existing definitions of criminality that are constructed as authoritative since they build on years of crime data (Hong, 2023). Yet these data are made through measures which have disproportionately targeted Black people as criminal (Hong, 2023). As a result, the very construction of authority to preemptively act on future criminality simultaneously racializes criminality and renders Black life a risk to white life, which must be protected. As authority to act on the future is constructed, white-supremacist ideology and its classification of which life is (not) precious is reproduced.

While I split racial authoritarian preemption to deal with each part analytically in this paper, they are not discrete movements but are mutually constitutive. Incorporating the theorization of 'the future' as a tool of coloniality is both a direct extension of Franklin's (2025) concept of preemption and helps tie together all three parts when analyzing the takeover of HISD.

Method

Using Critical Discourse Analysis (Fairclough, 2023), I examine discourses employed by the state-appointed superintendent in the Houston Independent School District to reveal how takeover actors discursively use 'the future' to enact racial authoritarian preemption. CDA is a method for analyzing how power is operationalized through discourse, especially by paying attention to what language *does* (Fairclough, 2017). As such, CDA allows me to examine the speech – including oral, written, and non-verbal (e.g. gestures) – of Superintendent Miles to reveal how the discursive use of 'the future' constructs power and produces schooling during the takeover of HISD. This is not an analysis of Miles's person, but of his speech, given his position of power to enact the takeover. CDA is not meant to perform a psychoanalysis (Ewing, 2018).

Context

HISD is the largest school district in Texas with over 184,000 students attending 274 school campuses in 2023 (Texas Education Agency, 2024). Houston politics are often at odds with Texas state politics. For example, in April 2026, Texas Governor Greg Abbott threatened to withhold approximately $110 million of state funding for public safety from Houston if the city did not repeal an ordinance eliminating the required coordination of local police with federal immigration authorities (Nguyen, 2026). These differences contribute to what Morel (2018a) calls a "disjointed state-local regime." This disjointedness can be partly attributed to the racial and partisan differences between state representatives and the Houston population. The racial difference is especially stark when looking at the HISD student body (see Appendix A). While the majority of HISD students identify as Hispanic, the state legislature is 58% white. Further, while the Houston population is 24% white, the HISD student body is just 10% white. In terms of partisanship, Republicans have held power at the state level in Texas for over twenty years while Democrats have held power in Houston. This disjointed state-local regime results in disproportionate state interference in city governance that exposes the people of Houston to increased levels of monitoring and policymaking that is not responsive to their interests (Morel, 2018a).

TEA officially took over HISD in June 2023, replacing the elected school board with an appointed Board of Managers. The legal justification for the takeover, according to TEA commissioner Morath, was seven years of consecutive unacceptable ratings[4] by a single school campus within HISD from 2011 through 2019 (Morath, 2023). This move followed years of legislation, an initial attempt at takeover in 2019, legal contestation by the Houston Federation of Teachers and HISD's elected trustees, and newly introduced legislation determining which districts would be subject to takeover (see Dawer, 2025 for a policy timeline leading up to the takeover).

Commissioner Morath appointed Mike Miles as the new superintendent of HISD. Since Miles's appointment, Houston educators and community members have expressed concern that he would introduce in HISD the same prescriptive teaching methods and evaluation measures he implemented as the superintendent of the Dallas Independent School District (White, 2024). Community members have deplored Miles's disregard for the perspective of students, teachers, and parents (Elegon, 2024), but supporters praise his willingness to implement his plan in the face of significant criticism (González Kelly & Goodwin, 2024). Miles himself reposted a post made by

[4] TEA assigns yearly accountability ratings to schools based on their evaluation of students' academic achievement and preparedness for life after graduation (TEA, 2025).

billionaire John Arnold (2025), who puts millions of dollars into education reform, which suggested that "Houston might be a blueprint" for urban K-12 reform across the U.S. Early signs suggest it is being used as such. TEA has taken over the Fort Worth Independent School District mirroring the model of the HISD case (Sanchez, 2026), and Tennessee Republican lawmakers point to the HISD case as the model they plan to follow in their attempt to takeover Memphis-Shelby County Schools (Hatch, 2026). An education consulting firm, in a bid to win a contract with a charter school network in Texas, proposed that Miles's reforms are the only proven approach for quickly turning around failing schools (Mizan, 2026). For supporters and critics alike, Miles has become the representative figure of the takeover and its ensuing reforms.

Data Selection

I analyzed the discursive elements of two presentations where Superintendent Miles articulated his vision for the takeover. Both presentations were titled "Destination 2035." The first presentation occurred at the beginning of the takeover during the June 22, 2023, Board of Managers meeting. It represents the vision and intention of takeover actors as they entered HISD. The second presentation took place one year later, on June 18, 2024. This presentation was initiated by the Houston Mayor and City Council when they sent a letter to Miles requesting that he address community concerns "about transparency and fairness in decision-making related to the district's students, staff, and teachers" (DeGuzman, 2024). Miles presented to the Council's Economic Development Committee with updates from the first year of the takeover. Both presentations occurred in meetings that were open to the public and included time for questions and answers with the officials to whom he was presenting.

For each of the presentations, I generated a transcript and downloaded the publicly available slide set. I also watched the publicly available video recordings of each presentation to analyze the superintendent's tone, prosody, expressions, gestures, and silence throughout the presentation as well as the tone and vocalizations of the attendees.[5]

Researcher Positionality

I spent many hours watching and reading Miles's presentations. As a white researcher and educator who is new to Houston, there were times where I felt a longing to believe the superintendent could solve inequity. He had a way of making his approaches sound rational and sure, though I knew through my own experiences as a teacher, and my engagement with parents and educators in HISD, that they could severely reduce the potential for learning. Miles, as a fellow outsider in Houston,[6] seemed to suggest that the Black and Latinx communities in HISD do not know what is good for them, an easy narrative for white academics and legislators (along with any who subscribe to a white-supremacist ideology regardless of their own racialization) to adopt – a narrative that allows for one to be both 'good' and to maintain power over racialized others (Dumas, 2013).

Despite the seductive promises of future equity and stability offered in the superintendent's discourse, the use of CDA revealed the enactment of racial authoritarian preemption in the process

[5] The camera angle kept most of the attendees out of the frame, and only a few of the audible words from attendees were decipherable on the recordings. This limited my analysis of attendees' vocalizations to tone and affective resonance.
[6] Miles moved from Colorado, where his family home remains, to Houston for the superintendent appointment (González Kelly & Goodwin, 2024).

of takeover. The incorporation of 'the future' as an analytic lens helped demonstrate how this is justified, constructed, and enacted.

Data Analysis

I drew on Fairclough's (2023) four-stage approach to CDA. First, I selected the enactment of takeover as a social wrong, building on existing literature that highlights the racialized and authoritarian form of takeover. Second, I considered how the discourse of 'the future' is used to maintain the takeover, making it appear necessary. Third, I recognized how the takeover contributes to the "racio-colonial predicament" (Leonardo et al., 2023), where life gets valued differently according to a white-supremacist ideology. In the fourth and final stage, Fairclough calls for the identification of moves to end and remedy the social wrong. While I do not complete the final stage in this paper, I invite readers to respond by participating in the fourth stage.

When I first encountered the slides from the June 2023 presentation, I was struck by the futuristic imagery. I analyzed the content on the slides from both presentations, including what was absent, and produced a set of inductive codes. My coding was informed by the theorization of the future discussed above (Anderson, 2010; Baldwin, 2012; Cantó-Milà & Seebach, 2024). I recalibrated my analysis by reading the transcripts of the presentations alongside studies of takeover (Buras, 2011; Cassidy & Nelson, 2024; Dawer, 2025; Rogers, 2012; Welsh et al., 2019b), attending to racializing discourse. I produced a second set of inductive codes through this reading. Then, I looked for similarities between the first set of codes from the slides and the second set of codes from the transcripts. Focusing on where the codes overlapped, I noticed how they mapped onto racial authoritarian preemption (see Appendix B). For example, the code 'against time' from the analysis of the slides was matched with 'deficit/behind' from the analysis of the transcripts, and then I noted this match as central to the racializing discourse throughout the presentations. Finally, I watched each video twice: once to analyze the superintendent's tone, prosody, silence, gesture and expression using the consolidated set of codes, and again to analyze the interactions between the superintendent, the officials to whom he was presenting, and the community members in attendance.

Findings

I find that the discourse employed in each of these presentations utilizes 'the future' to adopt a logic of preemption that justifies and enacts takeover processes that are both racializing and authoritarian in form. The *future* is represented as radically different from the present, a dangerous and unnavigable realm for local communities. For this reason, takeover actors build an argument for *preemptive* action, imposing new processes that confine students to prepare for this fixed future. Themes of equity and deficiency are discursively employed to construct a desirable future and to determine who will fit in it. This discourse is *racialized* explicitly through references to the racial "achievement gap" and implicitly through race-evasive, coded language that marks students and communities that need to be taken over as Black and Latinx. These communities, incapable of moving into the future, so the story goes, require radical change from above. The resulting *authoritarian* form of leadership by takeover actors is evident in assertions of certainty about what outcomes are desirable and how to achieve them, leaving no room for deliberation. In both presentations, 'the future' is wielded as a discursive tool to justify takeover and carry it out as a form of racial authoritarian preemption.

Preemption: Using 'the Future' to Mobilize Anticipatory Action

We're not spending enough time on year 2035 competencies. Our kids won't be ready.
—Mike Miles, June 22, 2023 Board Meeting, 56:23

Representing the Future

Takeover actors have titled the project of the takeover "Destination 2035."[7] Both presentations, to the Board of Managers at the beginning of the takeover in 2023 and to the Houston City Council's Economic Development Committee one year later, begin with this title, spoken by Miles and displayed on the title slide. The images on both title slides present a radically different, even otherworldly, future compared to the present (see Figures 1 & 2). On the slide from June 2023, a human hand and robotic hand touch index fingers. A shining orb that looks like some sort of digital planet – with rings, internal nodes, and networks – suggests a future where 'successful' humans and intelligent robots create powerful new worlds. This future centers the interplay between technology, artificial intelligence, robotics and the human white-collar worker. On the title slide from June 2024, the image of two young, white children standing on one planet and looking up at another planet – which appears to be the Earth – in the sky implies a new world is coming. In this representation, planet Earth is a place of the past, suggesting that students must learn to inhabit a new world (and maybe even a new planet) to successfully participate in the future. Destination 2035, then, frames the takeover as a program to prepare students to inhabit a newly emerging world which is radically different.

Figures 1 & 2

Presentation Title Slides

Note. Figure 1 (left) is the title slide from Miles's June 22, 2023, presentation to the Board of Managers. Figure 2 (right) is the title slide from Miles's June 18, 2024, presentation to the Houston City Council's Economic Development Committee.

It is unclear what the 'destination' in Destination 2035 is exactly, as it never gets defined in either presentation, but it is discursively used to suggest that whatever is (inevitably) coming will be

[7] Double quotation marks are used throughout the findings to represent exact words and phrases used by takeover actors; while single quotation marks are used to denote a word or phrase is being used in a particular way, as in 'the future,' or to denote skepticism about the accuracy or utility of a word or phrase, as in 'successful.'

radically different from the present and require new approaches in schooling. In Miles's initial presentation to the Board, he explains:

> This is about looking down the road to the year 2035. If you don't put stakes in the ground as to a possible future, then any path forward will do. And it's almost always the path you're on. Which we have said over and over again is not going to close the achievement gap or get kids prepared. (HISD TV, 2023, 1:39:57)

It is suggested that takeover actors have special knowledge about, or some ability to shape, the coming future – the destination – that allows them to provide the necessary approach to prepare for such a future.

Miles claims that students, teachers, and communities must follow the procedures of the takeover to be ready for Year 2035:

> Even if our kids could read at the proficient level, even if all of 'em could. We still have a problem. And that is the world has moved on... and there are Year 2035 competencies that our kids need, like information literacy, problem solving, learning how to learn, working in teams, working with AI, communications. Those are really key things, not just for high schoolers, but also for the kids who are going through the system in 12 years... so that they reach Year 2035 ready. (HISD TV, 2023, 55:26)

While these competencies are listed as ways to be ready for 2035, the discourse does not explicitly state what it is about the "Year 2035 environment" that requires takeover actors to intervene. Despite this, it is their certainty about Year 2035 and what it will require of students that they mobilize to justify their role leading HISD into this future. This future, simultaneously undefined and fixed, becomes a powerful tool for justifying and enacting the takeover.

Relation to the Future

One of the central problems for the takeover to address, according to Miles, is that kids are not being *prepared* for Year 2035. Anticipating this fixed and imminent future – throughout the presentations Miles repeats "we don't have time" and similar statements producing urgency – takeover actors employ the logic of preemption:

> It is possible [to prepare students for Year 2035], but we have to work differently. I tell you right now, I say in public, I've said this to the staff, to the principals, and the teachers. HISD cannot improve this system, has no chance, zero chance of improving or changing that those data or getting kids to read or preparing kids for the Year 2035 if we keep doing the same thing. (HISD TV, 2023, 56:50)

Through this discourse, Miles uses preemption to bring the future into the present (Anderson, 2010) and shape the takeover as a necessary intervention. Valuable schooling is constituted as that which *prepares* students for Destination 2035. The work of the educator, then, is to help students assimilate into this particular future, molding them to fit into what is coming with the support of takeover processes.

The discourse of Destination 2035 represents the future as fixed, limiting the possible ways of relating to it. Students in HISD are rendered unable to act on the future. That is, they are never considered to have any power to shape, change, or contribute to the production of the future. For example, we might expect a discourse about schooling and the future to include comments about how students will play a role in shaping the future, but such comments are absent from the presentations. Instead, the question is whether students will be able to survive and fit in the coming future, an external existence into which they must assimilate. The takeover project is "about looking down the road to the year 2035," but not for the sake of changing the world or empowering students to work for the futures they desire. Once students are "able to read and have the skills for Year 2035 environment," Miles says, the takeover will no longer be necessary – students will be prepared.

Both presentations end with an image and dialogue from the movie *Interstellar* to highlight the challenge and necessity of moving into radically different and undefined futures. In the movie *Interstellar*, the earth can no longer sustain human life, and humanity must colonize another planet to survive. Miles uses this reference to suggest that HISD, like the earth in *Interstellar,* can no longer support the life of students in the future, and the district must make a drastic change – equivalent to colonizing another planet – to make life viable for students in the future. The slides depict dialogue from the movie where one character says, "It's not possible!" and the protagonist responds, "No, it's necessary." The use of this dialogue positions takeover actors as leaders of a mission into the unknown, able to promise defined outcomes through the takeover process despite the impossibility of defining or predicting the future. Takeover actors become the hero in this story as they have the political will and determination to do what others would consider impossible – prepare the students of HISD to fit into Year 2035, disciplining them into suitable citizens of this particular future. In determining who fits into the future and how, Miles employs a racialized discourse, which I turn to in the next section.

Racialization

We have a tale of two districts.

—Mike Miles, June 18, 2024 City Council Economic Development Committee Meeting, 4:53

Equity

Superintendent Miles begins each presentation by dividing the district into schools that are doing well and schools that are not based on differences in student achievement on standardized tests, going so far as to say these are essentially two separate districts. He highlights the racialized nature of this divide by sharing NAEP data where the percent of students considered "proficient" is significantly higher for white students than for Black and Latinx students. In the 2023 presentation to the Board, Miles emphasizes racial inequity as a central problem for the takeover to address:

> But problem number three is probably worse than one or two, and that is the achievement gap. Take a look at the right-hand side of the screen. Yes, our our white students are doing fairly well at 60% reading. That's good. That's comparable to the rest of the nation and to the Texas schools. But Black students are reading at 11% proficiency. Hispanic students at 14% proficiency. The gap is too large. It's 49% for African Americans. It's 46% for Hispanic students in HISD. These are kids that are compared to each other. (HISD TV, 2023, 50:39)

The evidence of equity, from the perspective of takeover actors, would be equivalent standardized test outcomes across different racial groups.

While Miles begins each presentation by highlighting race when talking about pursuing equity, he shifts to race-evasive language through the remainder of each presentation. He resorts to phrases such as "*some* kids," "*these* schools," "*urban* districts," and "*underserved* communities." Thirteen times he refers to the "achievement gap" – also referred to as "equity gap" or simply "gap" – to justify the need for the takeover. These references racialize the discourse throughout the presentations without explicitly mentioning race. For example, to explain to the City Council why the takeover is necessary, Miles said: "there's 123 D and F campuses, usually in underserved areas. And so we have a tale of two districts. We have a large achievement gap between this group and this group" (Houston Television, 2024, 4:45). While he does not mention race here, he has already racialized "this group and this group" through his representation of the "achievement gap."

This racialized equity discourse is not simply used to justify the act of takeover, but also the form, with Miles introducing his New Education System (NES) model – including prescribed teaching materials and strictly enforced teaching practices focused on test preparation (González Kelly, 2024) – in predominantly Black and Latinx schools (see Appendix A). He claims that *targeted* "wholescale reform" is in service of equity as he introduces the takeover vision to the Board:

> We're gonna try to do 150 schools, wholescale reform, and I'm going to explain what that means in a minute, um...not 273, because there are some schools that don't need transformation. Their particular con- (attendee laughs) their particular conditions, their particular areas, context doesn't require them to change wholescale. (HISD TV, 2023, 1:00:54)

The repeated use of "particular" signals the racialized implementation of this reform. While Miles uses race-evasive language here, embedded within the broader discourse in his speech this suggests some students, *particularly* white students, do not need this intervention. NES, the central reform of the takeover, is envisioned as a "transformation" in the service of closing the racial "achievement gap," which, in this discourse, would signify equity.

As the point of entry into his vision of takeover, Miles highlights racial inequity in HISD and suggests the takeover will change the trajectory of the district towards an equitable future. The discourse of the "equity issue," repeated throughout both presentations, constructs the takeover as necessary *for* Black and Latinx students in HISD. Throughout his speech, Miles uses "equity" to suggest that white students do not need the takeover and that Black and Latinx students do.

Deficit Framing

In both presentations, Black and Latinx students and communities are depicted through *deficit frames*. Deficit framing marks people as innately lacking what is required, incapable of success without the intervention of outside forces (Gorski, 2011). For example, Miles's repeated use of "achievement gaps" to justify the takeover suggests that students (and their community) on the 'low achievement' side of the gap are deficient. The discourse suggests that without the takeover intervention, they will continue to lack what it takes to succeed. According to Miles, they are "the last generation of students before the skills gap is locked in" (Houston Television, 2024, 5:22). That is, without the state intervention led by Miles, their future failure will be set.

The frequent use of "gap" to talk about racialized difference in HISD does not acknowledge the history of policies and actions, along with contemporary structures and systems, that have withheld educational resources from Black and Latinx communities and attempted to limit their opportunities for learning. Acknowledging these histories and structures requires new ways of talking about this "gap" which Ladson-Billings (2006), for example, has reframed as an "education debt" to Black and Latinx communities. Using the language of "gap" does not question the measures that are used to render the gap (e.g. the NAEP, the State of Texas Assessments of Academic Readiness), which themselves are racializing (see Dixon-Román, 2017). The racialized, white-supremacist histories and structures that produce and maintain these so-called *gaps* are the status quo. By not addressing them directly and instead claiming the incapacity of Black and Latinx students in the district, Miles's articulations produce a racialized deficit frame.

In the opening presentation to the Board in June 2023, after sharing slides that displayed the difference in NAEP scores by race, Miles said:

> Most important is do the kids, can they read, do math, and do they have the competencies to be prepared for year 2035? That's the question (disapproving murmurs from attendees). And the answer is, we're not reading well. Now, some people want to say... that the kids are doing well. Some kids are, no question. We're a tale of two districts. One where kids are doing fine, where the magnet schools a- many magnet schools are doing fine (inaudible comment from attendee). And where where this group is not doing fine. And yes, it's an equity issue. But... first we got to face the brutal facts. If we think we're doing well academically, then everything you're going to try to do and I'm going to try to do will be seen as for naught. But the facts are the facts. Our kids deserve better than what they're getting (attendees raise voices to contest the speaker). (HISD TV, 2023, 54:13)

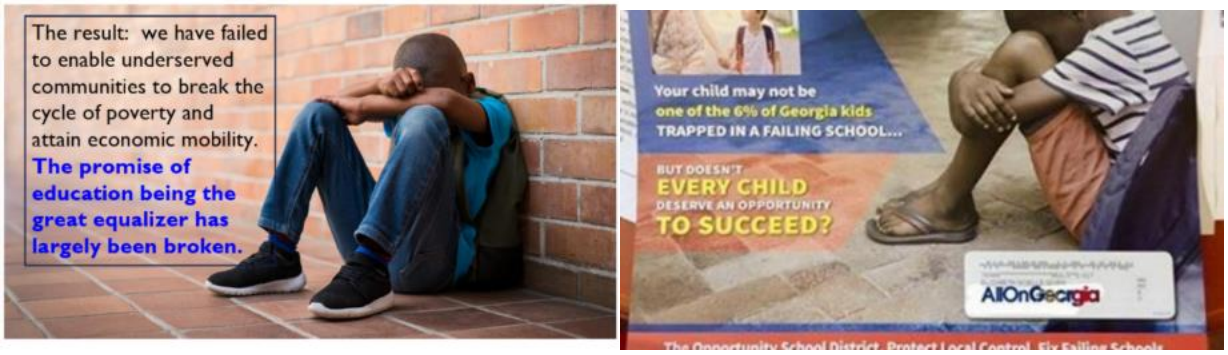
Without mentioning race explicitly, the reference to equity along with "some kids" and "this group" suggests that the students Miles is marking as deficient are Black and Latinx students within the district. This discourse suggests that these students cannot read – they lack literacy.[8] Miles argues that the takeover processes are only meaningful if this deficit is considered real.

As other scholars have highlighted, the discourses used to justify, shape, and enact takeover often pathologize Blackness (Welsh et al., 2019b). The speech and imagery in Miles's presentation to the Board contribute to this discourse. The third slide depicts a Black boy sitting on the ground with his head down between his knees (see Figure 3). When viewed in the context of Miles's speech, it suggests that the boy is going nowhere (he certainly will not survive on a new planet) without the takeover intervention. He is marked as deficient which maps onto the discourse of Blackness as pathological. In an analysis of the discourses supporting Georgia's state-run Opportunity School District, Welsh et al. (2019b) find images used in marketing materials supporting the takeover depict Black children as helpless and hopeless. They highlight a flyer depicting a Black boy in a very similar pose (see Figure 4) to the boy in Miles's presentation. Considering this discourse, Miles might be understood as framing the failure of pre-takeover HISD as its inability to effectively treat pathological Blackness.

[8] This deficit-framing not only represents Black and Latinx students as lacking but also constitutes literacy as a binary. One is either literate or illiterate. This reduces and erases the multiple literacies practiced by Black and Latinx students and communities.

Figures 3 & 4

Slide from Miles's Presentation & Marketing Flyer Supporting Takeover in Georgia



Note. Figure 3 (left) is slide three from Miles's June 22, 2023, presentation to the Board of Managers. Figure 4 (right) is a flyer analyzed by Welsh et al. (2019b).

Miles ends his first presentation with a deficit frame that utilizes 'the future' to cement the necessity of the takeover:

> The year 2035 is just around the corner for our kids. We don't have time. Kids are behind. Many kids in our high school are already so far behind. We're going to try to catch them up. But the truth is, it's gonna be hard to do that. They can't wait one year... for us to do serious things, bold things to help them... now! (HISD TV, 2023, 1:41:38)

This language of being "behind" or 'not having time' suggests that *these* students, which his discourse has already marked as Black and Latinx, are not where they *should* be. This is the normative power of deficit frameworks. Becoming 'successful' in this discourse is an assimilatory process into, or towards, whiteness, since one's distance from whiteness is the very construction of their deficiency. The proposed solution to the constructed deficiency, doing "bold things to help them," renders students that are not white as requiring outside forces to intervene in order to become successful. The discourse hints at the authoritarian form of the takeover, constructing the conditions to build an argument for the necessity of centralized, top-down, legalistic (as opposed to deliberative) governance.

Authoritarianism

I don't do it like everybody else, remember?

—Mike Miles, June 22, 2023 Board Meeting, 1:19:13

Assertion of Certainty

Miles's measured speech and steady tone, along with his calm and unphased appearance, create a sense of distance from the affective components of the takeover[9]. This allows him to present his approach as being grounded in rationality and objectivity, which generates a sense of *certainty* that takeover processes will produce the desired outcomes (i.e. raised test scores, similar test scores

[9] This is a notable contrast to community members in attendance who express anger and frustration through raised voices and emotive sounds. While not the focus of this paper, the affective responses of community members are important for understanding the effects of takeover.

across racial groups, and students who are prepared for Year 2035). In the 2023 presentation to the Board, Miles almost never acknowledged the lively attendees, keeping his back to them as he presented to the Board members who sat in the front of the room. He appeared unaffected by attendees' emotive interjections, and the frustration audible in the tone, volume, and speed with which they spoke. In one instance, Miles indirectly acknowledged the presence of those in attendance: "Right now...(attendees raise voices) HISD (attendees continue interjection)...has the system...that is getting the results it's getting (attendees voice disapproval)...I'll wait..." (HISD TV, 2023, 58:23). Miles paused and did not turn towards the people raising their voice, but looked up to the President of the Board and subtly signaled, with his hand in front of his chest, in the direction of the attendees speaking up. A few seconds later he explained, in a flat tone, "I'm waiting for the disruption." This rare response to the interruption is one example of his consistent posturing, rendering takeover actors an immovable authority.

Throughout the presentations, Miles expresses confidence that the approach of the takeover forces is certain to produce good schools. When asked, by a board member, what "good" looks like in the district, Miles responded:

> Number one, good looks like great quality instruction. We have spent four days with principals. We're going to spend more time with principals. We're going to spend more time with teachers on what exactly that means, so that everybody here, or all my leadership team, can walk into any school and at least have the same common language about this is what great quality instruction looks like. It's research based. It's well known what good quality instruction, but we need to be consistent, and everybody needs to know, including the superintendent on down to the assistant principal. (HISD TV, 2023, 1:21:21)

Echoing this speech, slide 37 claims, "We know what effective instruction looks like and will develop teachers to be the most effective teachers of any large district ever." This text is next to an image of the "Spot Observation Form" used for teacher evaluation. Miles uses the language of certainty – "we know" and "it's well known" – to talk about effective instruction. He talks about it as if it is determined and can be passed down, or prescribed, from administrators to teachers, as opposed to something that is contingent upon the particular teachers, students, and contexts and must be constructed in each moment. There is not much room for variance in instruction, as evidenced by the emphasis on principals and the leadership team knowing what effective instruction looks like for the purpose of enforcing the prescribed instructional processes. Essentially, Miles suggests that the takeover will make HISD the most successful urban school district ever if the vision and procedures – represented by the evaluation form on the slide – of the takeover are followed.

Although Miles, four times, makes the claim that this certainty is rooted in research, he never shares any citations or explains the research. He makes a similar appeal to "the facts" and "data" throughout his presentations. For example:

- "If people are willing to look at research and facts rather than anything on social media, you'll see that the evaluation system has been one of the best things for the Dallas Independent School District" (HISD TV, 2023, 1:37:39).
- "But I can tell you that in order to assess principals rigorously, you have to look at several things and you have to look at the data around several things besides being subjective" (Houston Television, 2024, 30:59).

Through these assertions of certainty, shaming those who take seriously the experiences of educators and students, takeover actors use their position of power to claim authority. Miles uses this authority to justify and implement controversial reforms like new teacher and principal evaluation systems (Walsh, 2023), defend the extreme rate of teacher turnover (Lehrer-Small, 2024), and roll out a pay-for-performance compensation plan (DeGuzman, 2025).

The assertions of certainty reveal an authoritarian approach to the takeover administration of HISD. The semiotics[10] of the slide show, along with Miles's language, prosody, tone, expressions, and silences, construct an extreme confidence that the takeover forces know how to produce desired outcomes. Importantly, these desires might not be shared by students, teachers, and the community. This assertion of certainty works hand-in-hand with centralizing decision-making power and eliminating deliberation, which I look at next.

Radical Change from Above

Throughout the presentations, Miles presents one central vision, ushered in by the takeover, as the only legitimate vision for schooling. He rejects deliberation as a waste of time, explaining that the urgency required by the fast-approaching future, Year 2035, requires takeover actors to *not listen* to the community. Explaining to the Board in June 2023, at the start of the takeover, why "wholescale systemic reform" was required, Miles quipped:

> We could have waited, done a 60 day or 90 day listening tour. Then we could have gotten five or six committees together to help put a strategic plan together. And I could bring you a strategic plan in April, right? And that strategic plan would have piecemeal things that don't make anything, nobody angry. We could have done that, and had we done that, our kids would be a year further behind. A year further behind because adults have all the time in the world [...] but our kids don't have any time. (HISD TV, 2023, 1:15:09)

In the name of urgency, and with a logic of preemption, Miles throws away the possibility of working with the community to make decisions about their school district.

The discourse employed constructs the local communities, schools, students and teachers as having nothing to contribute to the transformation of the district, which is why change must come 'from above.' Miles argues that failure was inevitable for HISD pre-takeover because it was "a district that had 274 autonomous schools with *no vision* [emphasis added] moving in different directions" (Houston Television, 2024, 7:38). This statement performs a discursive erasure of any vision from the community that does not align with the vision of takeover forces. These existing visions of schooling 'from below' are called "no vision," and autonomy is established as a problem. Through this discourse authority is centralized and deliberation diminished.

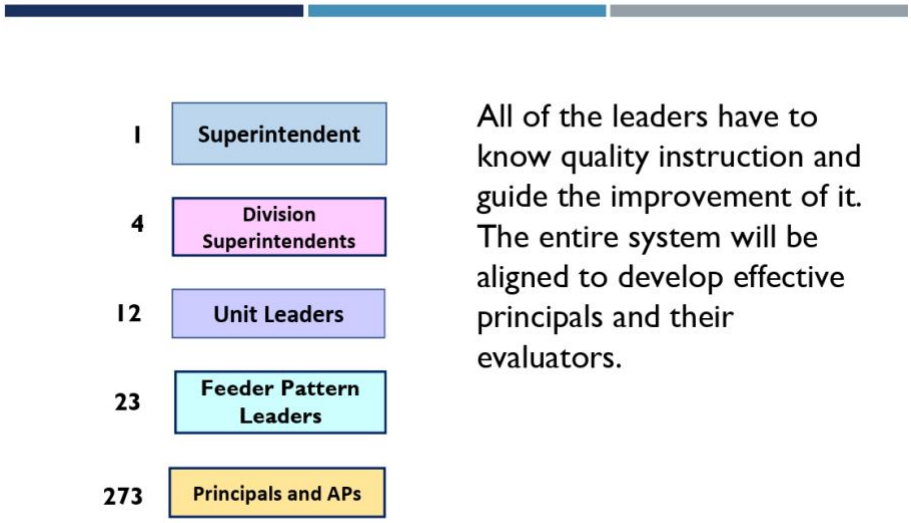
Miles critiques existing school and teacher autonomy, instead moving the district "to make sure autonomy is earned or defined" (HISD TV, 2023, 1:39:23) – continuing the pattern of increased state monitoring of Black and Latinx communities in cities through takeover (Morel, 2018a). Notably, the schools *deserving* autonomy in this model are the schools on the 'higher' side of the "achievement gap," which are also the schools with whiter and wealthier students. But for the

[10] By semiotics I mean the signs and symbols used to construct meaning through their usage in the slide shows. This includes the words, images, layout, colors, and the interplay of such elements.

majority of students in the district, this discourse reveals the process of takeover as being a process of radical change from above. This is clear in the visual on slide 34 of Miles's presentation to the Board in June 2023 representing the leadership structure to implement this change (see Figure 5). The slide depicts a hierarchy through which processes and definitions can be prescribed from the top and enforced through ongoing top-down evaluation.

Figure 5

Slide Portraying Hierarchy for Evaluating Instruction



Note. Slide 34 from Miles's June 22, 2023, presentation to the Board of Managers.

During the June 2024 presentation to the City Council, a councilmember questioned Miles and his evaluation of teachers and principals: "If the families of the school are upset with the decisions that are being made [about contract non-renewals and terminations], then the evaluation may have to be tailored" (Houston Television, 33:25). This counter-position, tailoring evaluations based on the desires and values of school communities, raises the question: To whom should the superintendent and district be answerable? This councilmember's comment suggests that he believes the values of the communities of HISD, which are predominately Black and Latinx, are not reflected in the processes of the takeover. This moment of contest over evaluation, a process of determining what should be valued within a system, reveals the approach of takeover actors – to enact radical changes from above, denying visions articulated by voices 'on the ground.'

Discussion

Since TEA took over HISD in June 2023, takeover actors have enacted racial authoritarian preemption, mobilized through discursive uses of 'the future.' The result is a foreclosure of teaching and learning. When 'the future' is imagined to be fixed and radically different than the present, one is left to prepare for the coming changes. Other relations to the future – like crafting, dreaming, or distancing – are determined to be senseless. Adding two claims (one racializing, the other authoritarian) to this use of 'the future' makes the takeover appear necessary: 1) HISD students,

particularly Black and Latinx students, are not prepared for 'the future,' and 2) takeover processes, as prescribed, will prepare these students.

The first claim is constructed through the racializing discourse underpinned by a logic of coloniality. Setting the Western, white human as the ideal form to which others should be compared, colonizers have rendered Black and Indigenous peoples as deficient in their humanness (Wynter, 2003). As Wynter (2003) explains,

> It was to be the peoples of Black African descent who would be constructed as the ultimate referent of the "racially inferior" Human Other, with the range of other colonized dark-skinned peoples, all classified as "natives," now being assimilated to its category – all of these as the ostensible embodiment of the non-evolved backward Others – if to varying degrees and, as such, the negation of the generic "normal humanness," ostensibly expressed by and embodied in the peoples of the West. (p. 266)

Drawing on this discourse, takeover actors imagine the students of HISD, especially the Black and Latinx students who make up the majority, to be perpetually stuck in the past, *primitive* (Mignolo, 2007). As Savannah Shange (2019) notes, "blackness is . . . constantly running *out* of time" (p. 14). The discourse of takeover actors maintains that Black students, along with others who have been conceived as 'racially inferior,' are unable to move into the future.

The second claim that necessitates the takeover in Miles's discourse is that students will successfully move into the future if teachers and students follow the prescribed takeover processes with fidelity. Given the colonial logic that establishes movement into the future as impossible for most students in HISD, the takeover actors are indeed a savior in this story (Dumas, 2013) – performing a miracle. The discourse reveals the foreclosure of many teaching and learning practices through takeover, especially asset-based pedagogies (Flint & Jaggers, 2021) like those that have been developed and cultivated in Black communities for centuries (see Buras, 2025; Muhammad, 2020; Royal & Gibson, 2017). When a future becomes *the* future, then a way to relate to it can become *the* way. In this enactment of power by takeover actors, potential is flattened and variation usurped (Massumi, 2002).

Recommendations

In response to the discourse of takeover actors in HISD and their uses of 'the future,' other futures must be brought into the present assemblage of schooling to generate possibilities for teaching and learning. Educators, students and communities in Houston already contest the future deployed in the act of the takeover. Beyond contest, the collective construction of desirable futures, and the very practice of desiring with one another, can reignite potential that has been dampened in the act of takeover. Plurivocal articulations of a vision for teaching and learning in HISD can work against the authoritarian character of takeover. In this 're-visioning' process, the racio-colonial hierarchy must be rejected, and the boundaries of 'the human' must be troubled. One way to do this might be to learn from the literacy practices of 19th-century Black literary societies, as Gholdy Muhammad (2020) suggests. Other ways will emerge as communities "collaborate in a discussion that crosses boundaries and creates a space for intervention" (hooks, 1994, p. 129). Without addressing the white-supremacist roots and embedded white-supremacist structures of public schooling in the U.S., takeover, and its attendant imaginaries, will persist (even if in new forms).

These other ways of working with 'the future' can re-constitute the present, and its multiplicitous life, as mattering. It can affirm Black life as precious and reject distance from whiteness as a salient measure for evaluation. Policymakers, administrators, teachers, and researchers must value the voices and affects in the classroom today without making evaluations solely dependent on the predicted outcomes of tomorrow – predictions that construct racializing authority regardless of whether they come true (Hong, 2023). Future research should look at how the present is made to matter in the classroom during takeover, how a plurality of futures can be incorporated into schooling, and what indeterminacy makes possible for teaching and learning.

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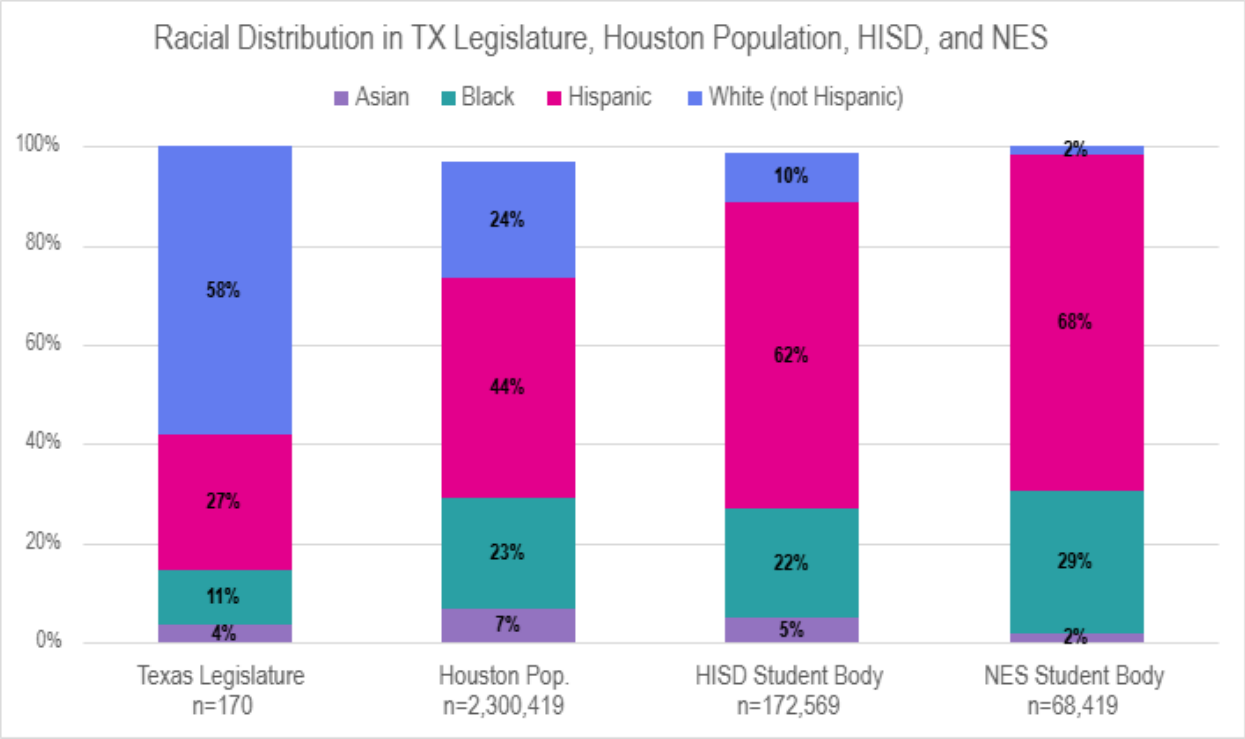
Appendix A

Racial Demographic Information Based on 2024-2025 Data



Note. Graph created by author using data from *The Texas Tribune,* the U.S. Census Bureau, the Texas Education Agency, and the Houston Independent School District.

Appendix B

Consolidated Codes, Generated from All Data

Code	Definition	Key Words	Example
Racialization (parent code)	A process of assigning meaning according to racial identity.		
Equity	The idea that school should set everyone up with the same opportunities. There should not be gaps in student achievement by race or socio-economic background.	equity, gap, achievement	"Problem number three, achievement gap. That's way too high and is an equity issue."
Deficit	The representation of students, schools and communities as being behind where they *should* be. Highlighting students lack of important and required skills, knowledge, experiences, and capacities.	behind, gap, grade level	"We don't have time. Kids are behind. Many kids in our high school are already so far behind. We're going to try to catch them up."
Authoritarianism (parent code)	Governing practices in which one person or regime makes unilateral decisions and has the power to enact those decisions materially.		
Radical change from above	The idea that top-down, strongly-enforced "wholescale systemic transformation" is required. The belief in legalistic, as opposed to deliberative, norms for ensuring students get what they deserve.	system, wholescale, courage	"One of the reasons is because boards and superintendents draw back as soon as there's criticism of one thing they're going to change. So they don't change much. They change one piece that won't insult or embarrass or make angry any part of the community."
Certainty	An extreme confidence that takeover forces know exactly how to affect student achievement. Being assured that the takeover approach is guaranteed to work and produce the desired outcomes. An appeal to "research", "data", and "facts".	best, quality, research	"We have a long way to go, but we know we're on the right path." (Slide 21, Presentation 2)

Preemption (parent code)	Taking action to prevent the realization of a possible future; limiting others' ability to affect futures, instead generating effects in one's own interest.		
Representing the future	Images, descriptions, or underlying assumptions about how the future will be.	2035, ready, world	"…there are Year 2035 competencies that our kids need, like information literacy, problem solving, learning how to learn, working in teams, working with AI, communications"
Conquering the future / Preparation	The idea that the end goal of the takeover is the future. All value is generated in the future. Articulating sanctioned ways of relating to the future to be successful.	time, 2035, ready	"This is about looking down the road to year 2035"

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Exposing the Cost: Financial Fallout and Community Exclusion Under Takeover

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Exposing the Cost: Financial Fallout and Community Exclusion Under Takeover

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Abstract

This study examines financial decision-making processes, discursive strategies, and community resistance during the state takeover of the Houston Independent School District (HISD). Using qualitative document analysis, we investigated appointed leaders' discursive strategies and trends in financial decision-making during the takeover. We found that appointed leaders reframed the "takeover" as a necessary "transformation." They placed fault on elected trustees, school leaders, and teachers for alleged financial mismanagement and lagging student achievement. Although they signaled equity in public documents, they made cuts to wraparound and transportation services, which disproportionately harmed marginalized students. Ultimately, the Houston community resisted these actions, highlighting the importance of community engagement during state takeovers.

Keywords: state takeover, school finance, school district leadership, democratic backsliding

Introduction

More than 100 U.S. public school districts have been taken over since the late 1980s (Schueler & Bleiberg, 2022). Studies have found that state takeovers disrupt student learning environments (Schueler & Bleiberg, 2022), fail to produce consistent gains in student achievement (Schueler, 2024), and disproportionately impact communities of color (Cassidy & Nelson, 2024; Morel, 2018). Beyond questions of effectiveness, state takeovers raise concerns about democratic governance when they replace locally elected school boards with state -appointed leaders, limiting opportunities for community participation in decision-making. In Texas, these concerns have become increasingly salient following the state takeover of Houston Independent School District (HISD) in 2023.

The Texas Education Agency (TEA) assumed control of HISD when Wheatley High School, a predominantly black high school, received its 7th consecutive failing accountability rating in 2019 (Dawer, 2025). Although Wheatley earned a passing rating in 2022, TEA proceeded with the takeover, appointing Mike Miles as the superintendent of HISD and replacing the elected school board with an appointed board of managers (BOM).

Superintendent Miles quickly imposed his New Education System (NES), "a comprehensive plan to transform public education" which includes "a clear instructional vision, innovative staffing, rigorous accountability, and expanded academic opportunities" (HISD, n.d.-d). Campuses with low "D" or "F" ratings on the state's A-F accountability system were required to join NES, as well as campuses that "feed" into them. Campuses with higher "D" ratings were encouraged to join NES (called NES-Aligned), and many did so to receive additional resources and to avoid scrutiny from Miles' administration (Homer, 2023; see Appendix A for a list of schools by NES status). During the first year of the takeover, 28 HISD schools were required to join NES. Three high schools—Kashmere, North Forest, and Wheatley—had received a D-rating during the 2022-2023 school year

(Goodwin, 2023). They were among the first converted to NES, along with the elementary and middle schools in their feeder patterns, most of which had received passing ratings.

We previously compared financial decision-making and reporting practices before and during the takeover and found a decrease in fiscal transparency under the appointed superintendent and BOM from June 2023 to December 2024 (Fousek et al., 2025). Since then, appointed leaders have come under fire for failing to secure board approval for $870 million in purchase agreements (Lehrer-Small, 2025). As the takeover remains ongoing, we revisited this case to better understand how financial decisions have been communicated and received by the public.

Although scholars have examined the academic and fiscal effects of state takeovers as well as community responses (Kissell, 2023; Morel 2018; Osworth, 2024; Schueler et al., 2017), less is known about how appointed leaders frame and justify financial decisions during takeovers and how communities respond to these decisions. Financial decision-making is particularly important during state takeovers because school budgets are often approved by locally elected school boards, providing community members with a voice in resource allocation decisions (Ni et al., 2018). Furthermore, the ongoing takeover in Houston offers a timely and urgent case.

This study discusses the relationship between K-12 school finance governance and public accountability, by examining how appointed district leaders framed and justified budgetary and other financial decisions to the community, as well as the community's response to those decisions and related engagement opportunities. Drawing on democratic backsliding theory, we analyze how financial governance became a site where appointed leaders expanded authority and engaged with public dissent. The following research questions guided our study:

1. How have appointed district leaders framed and justified financial decisions during the state takeover of Houston ISD?
2. How have HISD stakeholders responded to district financial decisions and community engagement opportunities during the takeover?

Literature Review

Takeovers

Research on the effectiveness of past state takeovers has shown mixed results. One early study of comprehensive takeovers, which target academic and financial or management issues, found that mayoral, but not state, takeovers improved academic performance in districts' lowest-performing elementary schools (Wong & Shen, 2003).

The presence or absence of community support may indicate and contribute to the extent to which a takeover succeeds in promoting student achievement. Wong and Shen (2003) reported that administrative and political turmoil in the first years of the 1998 state takeover of Lawrence, a predominately Latinx community in Massachusetts, hampered student achievement. Alternatively, Schueler et al. (2017) found that the later state takeover of Lawrence in 2012 received relatively little resistance, because the "receiver" spent the first five months of the takeover visiting schools, engaging with stakeholders, and gathering data prior to launching the turnaround plan. This takeover was more successful and produced large gains in math performance (Schueler et al., 2017).

Therefore, it is important to understand how appointed leaders in HISD engage with and communicate changes to the community.

Moreover, people of color are often disproportionately impacted by state takeovers of school districts (Morel, 2018). First, most takeovers have occurred in predominately Black and/or Latinx school districts. Furthermore, takeovers lead to racialized outcomes in political representation. Takeovers most often occur in districts with predominately Black school boards, as was the case in Newark (Morel, 2018). Prior to the state takeover of Newark Public Schools, Black community members had significant political power. During the takeover, the predominantly Black elected school board was removed from power and replaced by a predominantly White appointed board. Black representation on the local school board never recovered following the takeover (Morel, 2018). On the other hand, the state takeover of the Central Falls School District in Rhode Island paved the way for Latinx representation on the school board (Morel, 2018).

Fiscal Impact of State Takeovers

The racialized impact of takeovers extends into the school finance literature, where achieving equitable funding and resource allocation has been a challenge for many states and districts. Because elected school boards often approve budgets and influence spending priorities, changes in political representation may also shape whose interests are reflected in district financial decisions (Darden & Cavendish, 2012; Sampson, 2018).

While state takeovers have been increasing across U.S. school districts, little research has studied the intersection of school finance equity and budgeting decisions during state takeovers. This is particularly interesting given that nearly 75% of state takeovers attribute fiscal struggles as part or all of the reasoning behind the takeover (Lyon et al., 2025). Furthermore, these state takeovers often aim to increase fiscal issues for districts and schools.

The limited research on state takeovers and their fiscal impact has produced mixed and somewhat contradictory results. A study by Wong & Shen (2003) showed lower pupil-spending rates during state takeovers in the 1990s. However, Schueler & Bleiberg (2021) found no evidence that takeovers impacted expenditures. These earlier studies were limited in their data, and analyzed different years in their studies, potentially impacting the results and comparability of the findings.

More recent literature (Bleiberg et al.,2023; Lyon et al., 2025) has shown that state takeovers of school districts increase educational spending by roughly $2,000 per student on average (Bleiberg, 2023; Lyon et al., 2025). While this funding tends to be distributed in ways that promote racial and ethnic fiscal equity, the overall impact of the increase is not enough to meaningfully reduce educational inequality. In many instances, Black students are less likely to experience the full benefits of these spending increases, suggesting that state takeovers may have uneven and limited effects on marginalized communities (Morel, 2018). Given that many state takeovers (including Houston ISD) disproportionately impact districts with large proportions of economically disadvantaged students and students of color, (Lyon et al., 2025; Schueler, 2024) understanding the fiscal impacts of state takeovers on student outcomes, community support, accountability and overall equity is increasingly important for researchers, policymakers, and state education agencies.

District Budgeting

Budgeting and resource allocation decisions at the district level are driven by formal policies, structures, and practices (Williamson & Snow, 2013). These formalities limit how resources can be

spent, who has access to these resources, and what student needs are prioritized. District budgets are often limited by external mandates, categorical funding streams, and compliance requirements tied to federal and state sources (Bird, 2011). Restricted or designated funds, such as Title I, IDEA, competitive grants, or capital bonds, are typically earmarked for specific purposes and cannot be flexibly reallocated (Motta, 2019; Reinagel, 2014). Additionally, factors such as legacy costs, staffing ratios, and contractual obligations limit discretionary spending. In practice, districts allocate the majority of their budgets to core operational categories including instruction, operations and maintenance, food services, transportation, and personnel costs such as salaries and benefits (Batt, 2023). These expenditures are essential to the daily functioning of schools and reflect foundational commitments to student learning and well-being. At the same time, the limited pool of flexible funds becomes increasingly important, as it is often the site of negotiation, and strategic decision-making.

Beyond these formal structures and constraints, budgeting also unfolds as a highly political process, where decision-making is driven by various informal relationships between school leaders, stakeholders, and other community members (Kalil et al., 2023; Murray, 2019; Ni et al., 2018; Super & Murray, 2010). Through this process, district priorities are negotiated and equity commitments are solidified. Stakeholders, such as school board members, parents, business leaders, faith-based groups, community advocates and local organizations, can influence this process by bringing competing priorities and varying degrees of influence.

Although community stakeholders are frequently cited as essential voices in public education, they often occupy the lowest level of influence in formal budgeting processes. Their participation typically occurs through Parent-Teacher Associations (PTAs), Parent-Teacher Organizations (PTOs), public-private partnerships (PPPs), and vendor relationships (Ni et al., 2018, Super & Murray, 2010). To promote transparency and responsiveness, district leaders are encouraged to engage these stakeholders using structured opportunities for input, such as public hearings, budget workshops, and neighborhood outreach initiatives (Bryk et al., 2010; Herian, 2011; Murray, 2019; Silverman, 2011). These spaces allow community members to offer feedback and propose priorities for how public funds should be allocated. However, the final authority rests with district leadership, who must weigh this input against existing policy frameworks, programmatic goals, and fiscal constraints.

During state takeovers, elected school board members are typically removed from their positions and replaced with a state appointed board. This action takes away the district's voice in the democratic decision-making process, intensifying the state's power and influence over the district's budgeting process. With this, communities of color are further isolated from their school district, disrupting engagement and collaboration opportunities for family members and other community stakeholders and causing frequent political instability (Rogers, 2012; Mason & Reckhow, 2017; Morel, 2016).

Communication During Takeovers

Budgeting decisions during state takeovers are further shaped by strategic discourse that often frames takeovers as necessary and inevitable (Dawer, 2025; Kissel, 2023; Osworth, 2024). Communication strategies during state takeovers often serve dual purposes: informing the public and manufacturing consent.

In Oakland Unified School District, a fiscal crisis was used to justify the state takeover. Although community engagement forums were widely used, major budgeting decisions such as school closures

and charter expansions were already pre-solidified by the school board members. Here, Kissel (2023) showed that budgeting under takeover conditions can be framed as participatory, even when fiscal decisions reflect coercive logics. District leaders leveraged engagement as a discursive tool to legitimize takeover practices and minimize criticism, even while limiting community influence over financial decisions (Kissel, 2023). Listening sessions, advisory committees, and public forums were framed as democratic practices but confined to tightly bound parameters set by the state. The Oakland case underscores the need to critically examine not just the presence of communication, but also its function and power, particularly related to school finance equity and the reallocation of critical resources in Black and Brown communities.

Osworth (2024) studied communication patterns during the state takeover of a rural school district in the Southeast. Rhetoric from the state promised collaboration and community engagement, but many parents felt these promises were performative. Major decisions, including two school closures, were made prior to public meetings, which prevented parents from providing feedback. Moreover, state leaders blamed local officials and educators for the district's complex issues, which created mistrust from community members.

Houston ISD has mirrored these patterns, as appointed officials have used discursive strategies to shape the public view of takeovers and justify their fiscal decisions. Lovell (2022) first examined how Texas officials, during their 2019 push to take over Houston ISD, deployed a racialized narrative that positioned state actors as reformers while vilifying local leaders of color. This discourse aimed to legitimize the intervention by framing state control as necessary. Dawer (2025) found that during the March 2023 transitional period of the takeover of HISD, the district used a discourse of narrowing the scope to sideline broader concerns, a discourse of role categorizations to divide the community members, and a discourse of inevitability to curtail dissent during the transition. Ultimately, community members were treated as "passive recipients of the top-down implementation of takeover" (Dawer, 2025, p. 3).

In Texas, public school districts are legally required to ensure transparency and community engagement during the budgeting process, which is particularly important during state takeovers. Previous research (Fousek et al., 2025) has shown that although HISD claims they have been following these requirements, fiscal transparency declined during the first two years of the takeover, with more closed meetings, delayed budget releases, and vague or contradictory public statements. These practices were met with spending increases, uneven cuts to school resources, an increase in public backlash, failed bond measures, and increased teacher turnover.

Conceptual Framework

Democratic backsliding refers to the gradual deterioration of democratic practices and institutions, usually through legal reform that happens slowly over time (Bermeo, 2016; Waldner & Lust, 2018). Here, elected or appointed officials consolidate power while presenting actions as lawful (Levitsky & Ziblatt, 2018; Riedl et al., 2024). This process undermines accountability, transparency, and participatory governance, core principles of democratic systems like public education.

Democratic backsliding has been used to examine national politics, primarily within the field of public policy. However, more recent work has begun to highlight U.S. states as "laboratories of democratic backsliding," as they can centralize control and limit local autonomy (Grumbach, 2023). In this paper, we extend this concept to the phenomenon of state takeovers of school districts, a practice that interrupts local governance and public input. Because education in the U.S. is primarily

state-controlled, examining these takeovers as part of a broader trend of democratic erosion is critical for understanding how backsliding is spreading across public education systems.

We use three key concepts that help define backsliding as it relates to state takeovers of school districts: executive aggrandizement, norm erosion, and institutional capture, (Riedl et al., 2024).

- Executive aggrandizement happens when leaders expand authority beyond typical boundaries, justifying their actions through claims of efficiency or crisis management.
- Norm erosion is the weakening of expectations around public input and deliberation.
- Institutional capture refers to the restructuring of bureaucratic or governance bodies, limiting checks and balances.

These concepts guide our analysis of the HISD takeover. They help us examine how appointed leaders frame and communicate financial decisions, how equity concerns are addressed or omitted in fiscal documents and public communications, and how governance changes influence community responses to democratic backsliding. By situating district-level governance within the broader literature on democratic backsliding, this framework highlights how state interventions in education may contribute to the erosion of democratic norms and equity commitments at a national level.

Methodology

We engage in document analysis to examine the written and oral discourse around school finance expenditures, resource distribution practices, equity efforts, and other finance and resource related practices during the state takeover of HISD. Document analysis is a qualitative research method that allows researchers to analyze and find meaning from written and recorded artifacts (Bowen, 2009). This process began with data collection, where we gathered and organized video recordings, transcripts, and published records from board meetings and budget workshops, as well as adopted budgets and other financial documents on the HISD website. We also analyzed public communications from appointed leadership, including interviews and press releases. These documents were coded using a thematic analysis process, to identify patterns within the data (Braun & Clarke, 2006). Example codes for the qualitative data are listed below in **Table 1**.

Table 1

Qualitative Codebook

Code	Definition	Example
Reframing the Narrative	Language framing BOM actions as necessary reform or "transformation."	"We have transformed 85 schools through whole-scale, systemic change" (HISD, 2024b).
Shifting Blame	Appointed district leaders use language that suggests others are to blame for failed schools and financial practices. The new district is positioned as the 'savior,' and therefore decisions are justified.	"Prior to the state intervention, there was no concerted effort to align school and District action plans with the budget. This lack of alignment coupled with a decentralized approach to school improvement resulted in a failure to prioritize limited funds" (HISD, 2024b).

Code	Definition	Example
Equity Language	Language explicitly stating equity efforts, mentioning efforts to support marginalized communities such as students of color and economically disadvantaged students.	"The District's financial policies emphasize equity and access for all students, ensuring resources are targeted to the greatest needs" (HISD ACFR 2023, p. 146).
Efficiency Efforts	Language around a district's efforts to save money, cost-savings practices and their resulting outcomes. Often framed as a positive for the district.	"Doubling the number of students per bus would save… $25 million a year" (HISD, 2024b, p.21).
Community Resistance	Language by stakeholders and community members that actively challenges or resists the appointed board's actions and propositions.	"My community is tired of being on the menu. We want a seat at the table" (HISD, 2024d)

Limitations

HISD launched a redesigned district website in August 2025. As of September 2025, the district had not published district Annual Comprehensive Financial Reports for the years between 2020-2025, the only publicly available years. Instead, the district has posted Adopted Budget Books for every year except the 2023-2024 school year, when the district did not create an Adopted Budget Book (according to information obtained from a TEA Public Information Request we submitted in early August 2025.) According to the district website, "A budget must be adopted before funds can be spent for the upcoming fiscal year. The recommended budget book will be posted here until the board adopts the budget, and the CAFR is approved in the fall" (Houston ISD, n.d.a). Public information requests (PIRs) were submitted to both the TEA, and directly to HISD to seek more data and information throughout this process. TEA PIRs were promptly responded to with adequate information and support, while requests sent to HISD were never answered.

Findings

Reframing the Narrative

The appointed leaders of HISD have reframed the takeover as a "transformation" or "wholesale systematic reform" (Goodwin & Mizan, 2025b). In August of 2025, a spokesperson from HISD claimed that "HISD's transformation is working for students, teachers, and schools" (Goodwin & Mizan, 2025c). Miles has also referred to the changes in HISD as fostering a "high-performance culture" (Walsh, 2023). This narrative frames the takeover as something necessary to "transform" education for the sake of students.

The appointed leaders in HISD continue to publicly justify the takeover through the promotion of rising test scores and reframed rhetoric (Ackerman, 2025). However, these gains typically align with state interests over community preferences (McClenagan, 2025). Collecting data from various news sources (González Kelly, 2023; Menchaca, 2024a; Smith et al., 2023), we found that 76 schools in Houston ISD voluntarily opted into the NES model between 2023-2025 (see Appendix A). According to Superintendent Miles, these schools requested to join the NES program to "transform

their campuses" and receive additional support. Miles spoke about the initial 57 NES-Aligned schools from the 2023-2024 school year, saying:

> "I am overwhelmingly proud that this many HISD school leaders are ready to take bold action to improve outcomes for all students and eradicate the persistent achievement and opportunity gaps in our district." (Homer, 2023).

This rhetoric directly ties to the Reframing the Narrative code, as Miles praises the NES aligned principals as strong leaders who are making the right choice by giving up their autonomy for the district. However, many administrators reported feeling as if their "hands were tied," as one community leader stated:

> "[Administrators] think that they're going to get more support by joining the NES model. And you shouldn't have to join an NES model for your school to be supported" (Homer, 2023).

One early incentive for NES alignment was access to district-funded curriculum (HISD, 2024a). Due to school-level budgeting constraints, access to quality materials can be inequitable, even within the same school district (Darden & Cavendish, 2011). For under-resourced schools, particularly those under pressure to improve accountability ratings, free curriculum and instructional support may feel like a practical solution. Here, alignment with NES can be seen as a strategic compliance choice, where school leaders forgo autonomy to gain district alignment, resource access, and protection from perceived backlash.

While many campuses chose to align with NES, some actively resisted. One formerly high-performing elementary school, reclassified from an "A" to a "D," declined NES adoption despite district pressure. The principal, supported by families and staff, chose to retain and protect the librarian, language offerings, and extracurricular activities, which are cut under the NES model (Pearson & Guillermo, 2024). This resistance reflects a commitment to community needs and democratic decision-making.

Shifting Blame

The appointed administration blamed the former elected board of trustees for failing to adequately manage funds. In February 2024, the BOM released a 31-page Efficiency Report outlining the former board's budgeting errors.

> "Prior to the state intervention, there was no concerted effort to align school and District action plans with the budget. This lack of alignment coupled with a decentralized approach to school improvement resulted in a failure to prioritize limited funds. The District's typical response was to add staff and increase expenditures instead of using a budgeting process to ensure alignment and effectiveness" – HISD Efficiency Report (HISD, 2024b, p. 1).

However, the former elected board received annual awards from the Government Finance Officers Association (GOFA) and the Association of School Business Officials (ASBO) Certificate of Excellence in Financial Reporting (Fousek et al., 2024; HISD, 2023). They also received a 96 out of 100 from The Financial Integrity Rating System of Texas (FIRST) for the 2022-2023 school year (TEA, n.d.a). Suggesting there was no evidence of financial wrongdoing prior to the takeover.

Teacher Turnover

HISD has experienced substantial teacher turnover amidst the state takeover. More than twice as many teachers and other employees departed HISD in both June of 2024 and 2025 than in June of 2022 (Goodwin & Mizan, 2025b). Ahead of 2024-2025, nearly one in three teachers left HISD, a rate 1.7 times that of the state overall (Goodwin & Mizan, 2025c). More than 800 additional teachers left during the 2024-2025 school year (Goodwin & Mizan, 2025a), and approximately 2,300 teachers departed in June of 2025 (Goodwin & Mizan, 2025b).

Teacher turnover harms students. During a regular board meeting on August 14th, 2025, an HISD student shared "I walked into school for the first day on Tuesday, and almost all of the teachers are new. The faces we trusted are gone" (HISD, 2025e). Teacher turnover decreases instructional quality and undermines student achievement (Ronfeldt et al., 2013; Sorensen & Ladd, 2020). This was especially true for students in schools with higher proportions of Black students (Ronfeldt et al., 2013).

The appointed administration has attempted to blame teachers for the turnover. Miles suggested that most departed teachers were low performers and claimed that the district "is retaining our most experienced and our most effective teachers at higher retention rates" (Mizan, 2025c). This is also an example of reframing the narrative. In April, 733 teachers were recommended for contract nonrenewal, including 596 that received low ratings on the district's evaluation system. These teachers are among the 2,300 that departed in June, meaning that approximately one quarter of departures were related to contract nonrenewals based on performance, while three quarters were not. Therefore, most departures were neither involuntary nor due to low performance.

It seems that dissatisfaction with the district's top-down approach, not poor performance, motivated most of the turnover (Goodwin & Mizan, 2025b; Grace, 2026). Miles himself previously encouraged teachers that were critical of NES to leave the district, saying:

> "There are a lot of teaching jobs out there — not just in HISD, but elsewhere — and if you really don't like the NES schools, that's okay. It's understandable, it's not for everybody. So, choose" (Walsh, 2023).

These words position appointed leaders, not teachers, as experts. According to a middle school teacher in HISD, "all of Mike Miles' policies are based around the idea that teachers don't know what they're doing. Teachers are bad for the kids. We have to fix the teachers" (Sainato, 2024). The same student quoted earlier continued to say "You brag about growth, but let me tell you what's really happening in our schools. The administration doesn't just ignore teachers, it pushes them out," and described a teacher being disciplined in front of their students (HISD, 2025e). Ultimately, this creates a hostile, not "high-performance" work environment for teachers.

Replacing departed teachers could represent a significant expense, potentially $25,000 per teacher (Learning Policy Institute, 2024). However, it is unclear how many were replaced prior to the start of the 2025-2026 school year (Mizan, 2025c;). Miles estimated that as a result of declining enrollment, HISD would start 2025-2026 with 10,500 teachers, compared to 10,640 in 2024-2025 and 11,338 in 2023-2024 (Mizan, 2025c). The district purported to have only two teacher vacancies ahead of the 2025-2026 school year (HISD, 2025e, 2025f). However, they did share the total number of teachers or other employees. It is possible that the district eliminated vacancies by closing roles, not by filling them. Miles shared that "even if we have vacancies, there will be no substitute teachers, because we

have 700 teacher apprentices on top of the 10,500 teachers" (Mizan, 2025c). Moreover, Miles did not know the number of uncertified teachers, a key concern among HISD parents (KHOU 11, 2025; Mizan, 2025c). All of this could suggest that the district is relying on uncertified teachers and teacher apprentices to fill classrooms.

Prior to the takeover, HISD teachers were equitably distributed by race, because the campuses with the highest proportions of Black students had the highest proportions of Black teachers, as did predominately Latinx campuses with Latinx teachers (Thomas & Sanchez-Soto, 2023). Accordingly, Black teachers were disproportionately likely to work at NES schools, such as Kashmere, North Forest, and Wheatley High School, where 69-84% of teachers were Black in 2023-2024 (TEA, n.d.b; see Appendix B for student demographics by NES status). More than two thirds of mid-year departures in 2024-2025 were by teachers in NES campuses (Sinha, 2025). Although we do not yet know the races or ethnicities of departed teachers, it could follow that higher proportions of Black teachers voluntarily and/or involuntarily departed the district. Overall, 39.1% of teachers were Black and 30.4% were Latinx during the 2023-2024 school year (TEA, n.d.b). Future research should investigate takeover-related trends in teacher demographics.

Equity Language

Appointed leaders framed the budgeting changes as equitable. According to the Annual Comprehensive Financial Report (ACFR) from 2023-2024, "The District's financial policies emphasize equity and access for all students, ensuring resources are targeted to the greatest needs" (HISD ACFR 2023, p. 146). The district budgeted more for NES schools, which disproportionately enroll Black, Latinx, and low-income students (DeGuzman, 2025c).

However, students in NES schools reported negative experiences following the takeover.

> "You know, based on the movies about high school, you would think (school) would be something fun (or) a good learning experience, but this feels strict, kind of like a prison" – HISD Student, News Interview (Menchaca, 2023).

Furthermore, students in predominantly Black and Latinx schools lost trusted leaders, almost 50 of whom were forced to resign or face board termination during the 2023-2024 SY (Mizan, 2025b).

> "Principals we love and trust are being fired, mostly at Black schools … and for what? … When you take them away you don't just fire a teacher, you break trust. … Please stop hurting Black and Brown schools, we deserve the same love, care, and creativity as everyone else." – HISD Student, June 12th, 2025 Board Meeting (HISD, 2025d)

This supports Morel's (2018) finding that state takeovers disproportionately impact communities of color.

Community Engagement Committee

In September of 2024, the HISD BOM rated itself 1 out of 10 for "advocacy and engagement" (Lehrer-Small, 2024). To improve in this area, the HISD board formed a Committee Engagement Committee (CEC), which recommended a Community Engagement Action Plan (HISD, n.d.-b). This plan included a protocol and recommended script for community engagement events. This plan also stated a commitment to engaging with underrepresented students, communities with underperforming campuses, and marginalized communities, including those who had been less

engaged in board proceedings (HISD, n.d.-b). The co-chairs provided an update on the CEC during the January 16th, 2025 regular board meeting, in which they presented community engagement as both a district priority and a statutory requirement in Texas (HISD, 2025a).

As a result of the community engagement sessions, the co-chairs identified the following areas for growth: expand guidance and access to opportunities, address resource disparities across campuses, balance testing with creative learning approaches, increase advisors and career prep resources, and focus more on mental health and well-being. Some of these areas for growth were vague. In regard to the first two items, co-chair Rolando Martinez mentioned "making sure there's counselors at each campus and there is an equity of those counselors across our district," but did not explain the type of counselor (e.g., academic or social) or their credentials (HISD, 2025a). Moreover, we did not find evidence that the BOM has heeded this feedback. Instead, HISD eliminated wraparound services in April of 2025 to "maximize scarce resources," which is examined in the next section (DeGuzman, 2025a).

Efficiency Efforts

As the takeover progressed, the appointed administration also made cuts to transportation and wraparound services, which low-income and Black and Latinx students were most likely to use. This section explores these cuts, which leaders reframed as "efficient."

Cuts to Transportation

During the first year of the takeover, HISD shared plans to optimize the district's transportation system. It claimed that pre-takeover practices were costly, inefficient, and failed to provide reliable transportation to students. In the February 2024 Efficiency Report, appointed leaders proposed that "doubling the number of students per bus would save… $25 million a year" (HISD, 2024b, p.21). Moreover, they planned to contract with Edulog, a software platform that manages student transportation.

Ensuring students have sufficient access to school transportation is a critical aspect of fostering educational equity (Weinstein et al., 2024). School bus ridership improves student attendance (Gottfried, 2017; Weinstein et al., 2024), which is directly related to school funding in Texas (TEA, 2020). Furthermore, students of color and economically disadvantaged students are more likely to rely on school transportation (Weinstein et al., 2024). In HISD, where most students are Black or Latinx, maintaining an adequate and efficient transportation system is essential.

Nevertheless, HISD's initial efforts to optimize the transportation system only saved the district $3 million, much less than the estimated $25 million, and left 700 students without bus routes at the beginning of the 2024-2025 school year (Zuvanich, 2024a, 2024b). A community member addressed the BOM regarding the issue of transportation during the school board meeting on November 14, 2025; "every day I take kids to school because you do not provide a bus" (HISD, 2024d). Ahead of the 2025-2026 school year, the district revamped its transportation system again. It increased the distances from students' homes to bus stops, up to two miles for students who attend their assigned school and three or more miles for students that attend choice schools (Partain, 2025b). The district emphasized the shorter ride times, but disregarded the burden placed on families to travel to the assigned bus stops (Partain, 2025b).

Cuts to Wraparound & Support Services

Following the takeover, cuts to wraparound services disproportionally affected campuses serving marginalized communities. In May 2024, the district eliminated numerous jobs for district wraparound resources specialists, who supported students with "transportation, clothing, shelter, special needs support, mental health resources, food pantries and telehealth services" (Nguyen, 2025). The consequences were immediate and deeply felt. As one student testified:

> "Even the wraparound services are broken. I came to school soaked one day looking for help. No one was there. I sat in wet clothes all day. That's not an accident. That's a policy. This isn't reform. It's sabotage. They call it accountability, but who's holding them accountable?"
>
> - HISD Student, August 14th, 2025 Board Meeting (HISD, 2025e).

In place of campus-based wraparound services, the district opened an eighth Sunrise Center (Partain, 2025a). Sunrise Centers consolidate non-academic student resources away from campuses to designated centers around the district (DeGuzman, 2025a, 2025b). Although most students live within 10 minutes of these centers, the students who most need the resources must depend on public transportation to access a center (Pham et al., 2025). As one Trustee notes, "we had a working solution with wraparound services, but it was removed and replaced with something that costs more and serves less" (DeGuzman, 2025b). Nevertheless, during a June 12th board meeting, Mike Miles and the BOM praised the success of the Sunrise Centers. One concerned community member pushed back. Referencing the cuts to wraparound services, she said

> "Many of these students don't have transportation to get to the Sunrise Centers, unlike what we heard earlier, for clothing, food, and necessities. Therefore, these children, many of them immigrants, suffer. Yet you decided this would be a good way to cut the budget." - Community Member, June 12th, 2025 Board Meeting (HISD, 2025d).

Selling Properties

To increase revenue, the BOM voted to sell district properties. The board previously moved to add the revenue from sold properties to the district's general fund, not the capital renovations fund. Then, the BOM declared 17 properties a "surplus" during a regular board meeting on January 16th, 2025. They ostensibly discussed the properties during a closed session, and then reconvened to vote publicly and unanimously in favor of selling the properties. Next, the BOM accepted sealed bids for 16 of the properties and voted to sell six during the April 16th board meeting (HISD, 2025c).

The decision to sell properties was criticized by the community. During the November board meeting, a community member accused the BOM of "stealing and selling off HISD assets" (HISD, 2024d). After the vote to sell properties on January 16th, an audience member protested and was forcibly removed from the board meeting. She was arrested and banned from all HISD facilities through July 2nd, 2025 (Mizan, 2025a). The board chose a short-term cash infusion over preserving HISD's long-term investments.

Community Resistance

The community has expressed resistance to the state takeover of HISD. In addition to responding critically to specific district actions, which are included in the themes above, community members, including elected trustees, shared opposition to the takeover during HISD board meetings. During the board meeting on November 14th, 2024, an elected trustee shared:

> "My community is tired of being on the menu. We want a seat at the table" – Trustee Moore, November 14th, 2024 Board Meeting (HISD, 2024d).

One consequence of the district's failure to foster community engagement was the failure of the proposed $4.4 billion bond package in November of 2024 (Fousek et al., 2025; Lee, 2024; Menchaca et al., 2024). This came up frequently during the board meeting on November 14th, 2024, when speakers criticized the bond measure, saying "on your next bond proposal, make sure there is no school closure or collocation or it will fail again" and arguing that members of the BOM were "begging for $4.4 billion to fuel your addiction to destroy HISD and public education" (HISD, 2024d). Moreover, the community rejected blame shifting by the BOM. As another elected trustee said,

> "I want to implore you to stop saying that people that disagree with you are just putting adult interest over students. People who voted no [to the bond] care about kids just as much as anyone else" – Trustee Gomez, November 14th, 2024 Board Meeting (HISD, 2024d).

Discussion

These findings demonstrate democratic backsliding, exemplified through executive aggrandizement, norm erosion, and institutional capture, each of which is described below.

Executive Aggrandizement: Framing Takeovers as 'Transformation"

The state takeover of HISD shows how appointed leaders expanded centralized authority while presenting changes as necessary reform. Appointed leaders strategically rebranded the takeover as a "wholesale transformation" and described it as a positive shift towards a "high performance culture" (Goodwin & Mizan 2025b; Walsh, 2023). This language framed the rigid, top-down reforms as a necessary solution to academic achievement gaps. Superintendent Miles required 28 campuses to adopt the NES model during the 2023-2024 school year, and persuaded an additional 57 to comply. Although these 57 campuses voluntarily aligned to NES, school leaders reported feeling pressure to conform, often due to budget shortfalls at the campus level (Homer, 2023).

Appointed leaders signaled equity to justify their actions. For example, they framed NES schools, which received additional funding, as equitable and necessary to boost academic performance for marginalized students. However, students shared their negative experiences in NES schools. Moreover, "efficient" cuts to wraparound and transportation services further undermined equity. These patterns align with typical backsliding actions where reformist language is used to legitimize centralization and power shifts (Bermeo, 2016; Levitsky & Ziblatt, 2018).

Norm Erosion: Losing Community Voice

Community expectations for participation and transparency from the appointed board weakened during the takeover. The Board of Managers rated itself 1/10 on advocacy and engagement, then provided scripted protocols for community sessions (HISD, n.d.-b). The feedback gathered from these sessions was ultimately ignored, as reflected in the appointed board's decision to cut wraparound services despite large pushback (DeGuzman, 2025a).

The failure of the $4.4 billion bond proposal and arrests at board meetings reflect a growing distrust and frustration with the district's lack of communication and punishment for dissent. Sentiments

such as "We want a seat at the table" (HISD, 2024d) show that community members expect to have a voice but were shut out.

Appointed leaders sowed distrust when they implemented rigid, top-down reforms without soliciting and incorporating feedback from the community. Although the BOM allowed community members to testify during regular board meetings, they seldom acknowledged nor responded to the speakers. The BOM finally created a Community Engagement Committee (CEC) in 2024, but it was too little, too late. Like Osworth (2024), we found that appointed leaders divided the community by shifting blame for inadequate academic achievement and financial mismanagement to elected trustees and former district leaders. Moreover, they blamed campus leaders, teachers, and community members for widespread dissatisfaction with NES, not flaws in the reform model.

Institutional Capture: Reshaping Public Education

The state takeover of HISD represents a shift from local governance to centralized authority. This diminished checks and balances, as elected trustees were removed from power and replaced with appointed leaders. This also reflects a larger shift in the state of Texas, where legislation established state takeover as a legal educational reform strategy. Beyond education, the Texas House of Representatives passed HB 2127, nicknamed the "Death Star Bill," in 2023 to allow the state to nullify local city and county ordinances (Fechter, 2023). Despite numerous lawsuits, the bill is currently in effect (DeGuzman, 2025).

The HISD takeover is a direct reflection of democratic backsliding: Leaders frame centralization as reform (aggrandizement), deprioritize community input (norm erosion), and use extreme budgeting and organizational changes to reinforce reforms.

This takeover is striking when juxtaposed with Texas' identity as a "free will state" that prides itself on independence and local control. Texas' approach to public education has traditionally been centered around their Independent School Districts (ISDs), where local communities retain authority over their schools. The state's increasingly centralized approach to public education signals a sharp departure from these proposed democratic values.

This juxtaposition reflects a larger issue of democratic backsliding in the current U.S. political climate. Over the last five years, state preemption, where states pass laws that supersede actions by local governments, has increased, especially for topics related to civil rights and education (Center for Public Health Law Research, 2025). While public education in Texas has historically been touted as a space for democratic participation, it is slowly turning into a contested political arena. If public schools become sites of democratic backsliding, the implications will extend into national democratic systems.

Conclusion

We previously identified a decrease in fiscal transparency during the first year of the state takeover of HISD (Fousek et al., 2025). However, the appointed BOM was more transparent during the second year. It hosted five budget workshops (up from three during the first year) and published a 2024-2025 Adopted Budget Book, which was missing in 2023-2024. Furthermore, it acknowledged its own failure to meaningfully engage with the Houston community.

Nevertheless, these actions represent the bare minimum required by the State, not accomplishments worthy of praise. Instead, the previous lack of transparency concealed $870 million in unapproved

purchase agreements by Miles, undermined community engagement, and sowed mistrust from the public.

Even as transparency increased in the second year of the takeover, the BOM did not consistently make decisions that addressed feedback from diverse stakeholders or fostered equity. For example, the cuts to wraparound services undermined feedback from stakeholders disproportionately impacted the most marginalized students.

The takeover was already extended through June 1, 2027 (Edison, 2025). Although we do not recommend state takeovers as an equitable reform strategy, we urge appointed leaders to use their remaining time in HISD to do better. We recommend that appointed leaders pause reforms, halt plans to propose school closures (HISD, 2025b), solicit and heed feedback from community members, and co-create sustainable plans for school improvement with stakeholders. Furthermore, we urge the state to restore local control of HISD by June 1, 2027, avoid taking over other school districts, such as Fort Worth ISD (Sanchez, 2025), and end state takeovers as a reform strategy.

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Appendix A

NES & NES-Aligned Schools

Original Mandated NES schools 2023-2024 (n=28)	Voluntary NES-Aligned Schools 2023-2024 (n=57)	Expansion of Mandated NES Schools 2024-2025 (n=24)	Additional Voluntary NES-Aligned Schools 2024-2025 (n=19)
Atherton Elementary	Alcott Elementary	Almeda Elementary	Bell Elementary
Berry Elementary	Ashford Elementary	Anderson Elementary	Foerster Elementary
Bruce Elementary	Benavidez Elementary	Askew Elementary	Frost Elementary
Cook JR Elementary	Blackshear Elementary	Browning Elementary	Gross Elementary
Dogan Elementary	Bonham Elementary	Codwell Elementary	Jefferson Elementary
Eliot Elementary	Bonner Elementary	Crockett Elementary	Ketelsen Elementary
Elmore Elementary	Brookline Elementary	Golfcrest Elementary	Montgomery Elementary
Henderson N Elementary	Burrus Elementary	Grissom Elementary	Neff Elementary
Highland Heights Elementary	Cage Elementary	Kelso Elementary	Petersen Elementary
Hilliard Elementary	Coop Elementary	Longfellow Elementary	Reynolds Elementary
Isaacs Elementary	DeZavala Elementary	Milne Elementary	Ross Elementary
Kashmere Gardens Elementary	Durkee Elementary	Peck Elementary	Sanchez Elementary
Marshall Elementary	Franklin Elementary	Sharpstown Elementary	Southmayd Elementary
Martinez R Elementary	Gallegos Elementary	Walnut Bend Elementary	Tinsley Elementary
McGowen Elementary	Gregg Elementary	Wesley Elementary	Valley West Elementary
Pugh Elementary	Harris JR Elementary	Woodson PK-5 Leadership Academy	Deady Middle
Roderick R Paige Elementary	Harris RP Elementary	Gregory-Lincoln Education Center (K-8)	Marshall Middle
Scroggins Elementary	Hartsfield Elementary	Clifton Middle	Navarro Middle
Shadydale Elementary	Hobby Elementary	Fonville Middle	Austin High

Original Mandated NES schools 2023-2024 (n=28)	Voluntary NES-Aligned Schools 2023-2024 (n=57)	Expansion of Mandated NES Schools 2024-2025 (n=24)	Additional Voluntary NES-Aligned Schools 2024-2025 (n=19)
Fleming Middle	Kennedy Elementary	Ortiz Middle	
Forest Brook Middle	Lewis Elementary	Thomas Middle	
Henry Middle	Lockhart Elementary	Welch Middle	
Key Middle	Looscan Elementary	Northside High	
McReynolds Middle	Northline Elementary	Westbury High	
Sugar Grove Academy Middle	Oates Elementary		
Kashmere High	Osborne Elementary		
North Forest High	Port Houston Elementary		
Wheatley High	Robinson Elementary		
	Rucker Elementary		
	Seguin Elementary		
	Smith Elementary		
	Thompson Elementary		
	Wainwright Elementary		
	Whidby Elementary		
	Whittier Elementary		
	Young Elementary		
	Reagan K-8 Educational Center		
	Cullen Middle		
	Edison Middle		
	Fondren Middle		

Original Mandated NES schools 2023-2024 (n=28)	Voluntary NES-Aligned Schools 2023-2024 (n=57)	Expansion of Mandated NES Schools 2024-2025 (n=24)	Additional Voluntary NES-Aligned Schools 2024-2025 (n=19)
	Hartman Middle		
	Holland Middle		
	Lawson Middle		
	M.C. Williams Middle		
	Project Chrysalis Middle		
	Revere Middle		
	Jane Long Academy		
	Las Americas Newcomer		
	Furr High		
	Houston MSTC High		
	Madison High		
	Scarborough High		
	Sterling High		
	Washington High		
	Wisdom High		
	Worthing High		
	Yates High		

Appendix B

HISD Enrollment by Race/Ethnicity and NES Status, 2023-2024

These values were calculated by the authors using campus-level data for the 2023-2024 school year (TEA, n.d.b). See Appendix A for a list NES and NES-Aligned campuses.

School Status	Total Enrollment (#)	Black or African American (%)	Hispanic or Latino (%)	Other (%)
NES (N=28)	13,766	40.5	56.9	2.6
NES-Aligned (N=57)	34,788	26.3	69.0	4.7
Non-NES (N=188)	135,555	18.1	60.4	21.6
Total (N=273)	184,109	21.3	61.7	17.0

Note: Other races include American Indian or Alaska Native, Asian, Native Hawaiian or Pacific Islander, Two or More Races, and White.

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"They're Suffering in Silence": Educator Health and Wellbeing Under Takeover in Houston ISD

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"They're Suffering in Silence": Educator Health and Wellbeing Under Takeover in Houston ISD

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Abstract

As a turnaround policy aimed at chronically underperforming schools and districts, state takeovers often fall short of their stated goals of improving student outcomes. Through examining the state takeover of the Houston Independent School District (HISD), I argue that educator wellbeing is a crucial yet overlooked mechanism within takeover implementation and evaluation. Leveraging Acton and Glasgow's framework for educator wellbeing, I conceptualize the HISD takeover as a shift in contextual factors and draw on interviews with HISD educators to analyze how new takeover realities shaped their health, stress, and relationships within their schools. I find that takeover reforms impacted educators' individual and relational wellbeing, such as physical and mental conditions, professional efficacy, and relationships within schools. This informed—but did not determine—educators' decisions to leave their schools, suggesting that educator wellbeing constitutes an important facet when examining large-scale policy interventions, like takeover.

Keywords: state takeovers, educator health and wellbeing, qualitative methods, teacher turnover

Introduction

When Dr. Ladybug[1] learned of the Texas Education Agency's (TEA) decision to take over the Houston Independent School District (HISD) on the news, she knew she had to return to the classroom. A veteran educator with over two decades of experience, she taught in multiple large urban districts, like Chicago, D.C., Atlanta, and even completed a Ph.D. in Urban Education. Dr. Ladybug saw the takeover announcement as an "opportunity to serve," especially the lingering impacts of COVID, sharing, "I can't solve the entire problem, but I can help those in front of me. I can only plant the seed, cultivate the seed, and hopefully give them the tools to continue with that growth."

Dr. Ladybug "chose HISD," intentionally selecting a school that "no one wants to go to, [with] the lowest test scores, the most challenges." She "knew what some of the things that I signed up for" were from her extensive experience, but admitted, "I didn't know that it was going to be like *this*." After her first year in HISD, the first year under state takeover, Dr. Ladybug resigned out of "self-preservation. Maslow's hierarchy of needs. I've never experienced the things that I did." This paper critically considers "self-preservation" by examining educators' health and wellbeing under takeover in HISD.

State takeovers ostensibly aim to improve student outcomes in chronically underperforming schools and districts by wresting control from local school boards in favor of state-appointed entities (Green & Carl, 2000). Despite increasing reliance on this policy, takeovers do not significantly improve students' academic performance in the short or long term (Schueler, 2024; Schueler & Bleiberg, 2021; Wong & Shen, 2003), raising questions about the mechanisms underlying these null effects.

[1] All names are pseudonyms to protect participant confidentiality.

No causal evaluation of the HISD takeover yet exists, but teacher attrition has since increased, with the average number of yearly teacher departures during the first two takeover years being 1.5 times that of the five years pre-takeover (Goodwin & Mizan, 2025a). June 2025 alone, over 3,400 educators left HISD, compared to 1,500 educator resignations in June 2022, the year before takeover (Goodwin & Mizan, 2025b). Like Dr. Ladybug, thousands of HISD educators decided to leave, and she offered one explanation for this exodus:

> You've heard the saying, suffering in silence. Many teachers, normally I call them educators, they're suffering in silence…The superintendent leads by fear. That's the culture he's trying to trickle down…And a lot of teachers are afraid of, if they communicate their thoughts, they'll be fired.

This paper interrogates the "suffering" Dr. Ladybug describes through educators' narratives of their physical, mental, and emotional conditions under the HISD takeover. Drawing on Acton and Glasgow's (2015) framework for educator wellbeing, I analyze in-depth, semi-structured interviews with twenty-one HISD educators to demonstrate how the new takeover landscape under state-appointed leadership shaped educators' everyday experiences regarding job-related health, stress, and relationships within their schools. I argue that educators' health and wellbeing are crucial, yet overlooked, facets of takeover implementation, offering a potential mechanism behind takeovers' ambiguous results in student outcomes. This broadens takeover policy repercussions to encompass educators as another core stakeholder group. These findings also shed insight into the relationship between contextual factors (i.e., high-level policy decisions implemented under takeover), educators' wellbeing, and teacher turnover (Acton & Glasgow, 2015; Nguyen et al., 2020). Most importantly, I seek to elevate the voices of HISD educators "suffering in silence" to inform education policymakers and practitioners making decisions affecting their employees' health and wellbeing.

Educator Working Conditions Under Takeover

By definition, takeovers catalyze turnover through replacing district leadership (i.e., school boards and superintendents) to drive improvements in governance and student outcomes (Green & Carl, 2000; Jochim, 2016). Yet nationally representative, causal inference studies on takeovers consistently find null effects on student outcomes that are unexplained by factors like changing student demographics, average class size, per-pupil expenditure, or length of intervention (Schueler, 2024; Schueler & Bleiberg, 2021; Wong & Shen, 2003). Individual case study results are mixed, with some districts experiencing positive effects (Harris & Larsen, 2018; Schueler et al., 2017), while others did not (Gill et al., 2007, 2007; Hayes et al., 2021). Little is known about the mechanisms producing these results, or lack thereof.

Takeovers allow state-appointed leadership to unilaterally alter educators' working conditions by annulling bargaining agreements with teachers' unions, modifying teacher evaluation systems, and introducing charter schools (Cohen et al., 2018; Fried, 2020; Russakoff, 2015; Schueler, 2019; R. O. Welsh et al., 2019). Thus, takeovers not only oust local leadership but also empower appointed leadership to fundamentally change the educator workforce through mass layoffs, high teacher turnover, and alternative recruitment strategies bypassing traditional certification requirements (Barrett et al., 2022; Henry et al., 2020; Pham, 2023; Schueler, 2019; R. O. Welsh, 2019). In New Orleans, takeover reformers, informed by neoliberal logics of competition to attract and retain "desirable" educators, fired thousands of teachers en masse, decimating the Black veteran educator workforce (K. Buras, 2015; K. L. Buras, 2011; Jabbar, 2015). Afterward, New Orleans had larger

proportions of novice educators, fewer certified teachers, and more educators without local roots in the city (Barrett & Harris, 2015; Harris & Carroll, 2025).

Such drastic changes can induce affective ramifications for educators. Mere threat of takeover induces stress, as educators are torn between pre-emptively changing their classroom practices to avoid sanction under test-based accountability and upholding their pedagogical philosophies (R. Welsh et al., 2019). Fried (2020) documents the grief, stigma, and uncertainty felt by district and campus actors during takeover transition, a tension that state-appointed receivership had to navigate. Many takeovers rely on charterization, leaving educators with the difficult decision to stay and conform to charter practices or leave, a phenomenon Kitzmiller (2020) calls "system mourning" over the "loss of a system of traditionally managed public schools that, in their ideal form, promoted democratic governance, dignified work, and equitable access" (2020, p. 388). While these studies highlight emotional tolls across various stages of takeover, they do not consider how disruptive takeover reforms shape educators' health and wellbeing holistically, particularly in the absence of charter partnerships. Addressing this gap is crucial for identifying mechanisms connecting takeover, educator turnover, and student outcomes, along with broadening the scope of takeover consequences.

Theoretical Framework: Educator Health and Wellbeing During Reform

Educators play an important role in shaping students' outcomes, experiences, and trajectories, with educators' qualifications, years of experience, and pedagogical philosophies influencing their interactions with students (Annamma et al., 2024; Darling-Hammond et al., 2005; Heilig et al., 2010; Jimenez, 2020; Rivkin et al., 2005; Rockoff, 2004). HISD students attending schools with more certified and experienced teachers had higher academic performance and fewer disciplinary incidents (Thomas & Sánchez-Soto, 2023b, 2023c). Elevated educator turnover is another factor associated with lower student achievement, and multiple, compounding reasons motivate educator exit (Nguyen et al., 2020; Ronfeldt et al., 2013; Simon & Johnson, 2015; Taylor et al., 2023). Educators' wellbeing is crucial when examining exit, given its link to health, job satisfaction, and professional efficacy, making it an important consideration for thriving learning environments (Benevene et al., 2019; Madigan & Kim, 2021).

Acton and Glasgow (2015) define educator wellbeing as "an individual sense of personal professional fulfillment, satisfaction, purposefulness and happiness, constructed in a collaborative process with colleagues and students" that is "further supported (or constrained) by contextual factors which enable teachers to realise their purpose and goals in teaching, provide realistic and manageable work demands that allow for autonomy, and which value, respect, and celebrate teachers' professional expertise and work practice" (Acton & Glasgow, 2015, p. 102). They propose a framework for understanding educator wellbeing comprised of three interrelated yet distinct dimensions: 1) Individual factors, 2) Relational factors, and 3) Contextual factors.

Individual factors entail educators' cognitive and affective capacities, including emotional intelligence, happiness/satisfaction, and professional self-efficacy. Relational factors refer to educators' interactions and relationships at school that create a sense of connectedness and belonging. Compared to individual and relational factors, less work has theorized how contextual factors—such as external policy changes and shifting accountability standards—shape educator wellbeing and retention (Acton & Glasgow, 2015; Nguyen et al., 2020). High-stakes, sanctions-based reforms, exemplified by test-based accountability introduced under No Child Left Behind, increase

job-related stress, undermine educator professionalism, and ultimately perpetuate deficit narratives blaming students, teachers, and schools themselves for underperformance (Ball, 2003; Hursh, 2007; McDermott, 2007; Mitani, 2018), though variability exists based on educator discretion and school-specific culture/leadership (Diamond, 2007; Grissom, 2011; Martin & Benedetti, 2025).

As a state-initiated turnaround strategy encouraged by federal legislation, takeovers offer an ideal site for studying how shifting contextual factors—namely, overhauled governance structures and accompanying reforms—impact educators' working conditions, health, and wellbeing (Jochim, 2016; Schueler & Bleiberg, 2021). Drawing on educators' accounts during the HISD takeover, I ask how these reforms: 1) Shaped individual factors of educator health and wellbeing, and 2) Changed educators' relationships with their students, colleagues, and administrators to impact their sense of belonging at school.

Takeover as Contextual Factor: Changing Policy Landscape Under Takeover in HISD

Houston ISD is the eighth-largest school district in the nation and largest district in Texas, enrolling 190,000 students and employing 11,000 teachers across 274 schools (Houston ISD, 2023). HISD serves a predominantly economically disadvantaged, majority non-White student body (see Table 1), though wide variation exists in socioeconomic status and racial/ethnic composition that reflects the diverse, yet segregated nature of Houston itself (Cortright, 2020; Ponton III, 2024). Like many large urban districts, HISD contains concentrated pockets of advantage and disadvantage, boasting top schools in the nation (Partain, 2025) while simultaneously struggling to meet disadvantaged students' basic needs (Cigarroa Kennedy & Stroub, 2022). HISD educators are more demographically similar to their students' racial/ethnic composition compared to other large districts, and special education (SPED)/English as a Second Language (ESL)-certified educators tended to be distributed across schools serving higher proportions of those student groups; however, Title I schools still employed more educators without formal education qualifications and less experience (Thomas & Sánchez-Soto, 2023a).

Table 1
HISD Student Demographics, 2023-24 School Year

Demographic Characteristic	Percent
Race/Ethnicity	
American Indian/Alaskan Native	0.17%
Asian	4.96%
Black/African American	21.37%
Hispanic/Latino	61.80%
White	9.76%
Hawaiian/Pacific Islander	0.07%
Two or More	1.86%
Emergent Bilingual/English Language Learner	38.95%
Economically Disadvantaged/Free & Reduced Priced Lunch	79.55%
Special Education	10.27%
Gifted/Talented	13.85%

Source: (Houston ISD, 2023)

In March 2023, after years of litigation, the TEA announced its takeover of HISD, citing that "one of the district's campuses received unacceptable academic accountability ratings for five consecutive years" (Morath, 2023). The TEA commissioner, Mike Morath, replaced HISD's geographically representative elected school board with a state-appointed, at-large Board of Managers (BoM), appointing Mike Miles as the new superintendent. TEA's decision was contentious from the start (Dawer, 2025; Lovell, 2022), indicating a disjointed state-local regime (Morel, 2018) where local stakeholders viewed state intervention with skepticism and hostility.

Unlike other takeovers relying on intervening in a small subset of schools (ex., Tennessee Achievement School District, Georgia Opportunity School District) and/or charterization (ex., New Orleans Public Schools, School District of Philadelphia), HISD's state-appointed leadership opted for "wholescale, systemic reform" (M. Miles, 2023) prioritizing scale and speed. Superintendent Miles enacted torrential policy changes affecting educators' working conditions (See Table 2), such as an open-door requirement within classrooms (Sessions, 2023), modified and strictly enforced paid time off (PTO) allowances (Bauman & González Kelly, 2023), and the introduction of spot observations tasking school administrators with more frequent classroom evaluations (Walsh, 2023). With the BoM loosening formal consultation requirements with teachers' unions from monthly to quarterly (Dunlap & Lehrer-Small, 2023), these changes occurred amidst diminishing input from educator labor advocates.

Table 2
Shifting Contextual Factors Under HISD's Takeover Reforms

Policy Change	Description
Open-Door Policy	• Teachers required to keep classroom doors open during instructional hours to facilitate evaluative observations and transparency
Staff PTO Policy & Enforcement	• Number of consecutive discretionary days reduced from 3 to 2 and consecutive sick days without doctor's note reduced from 7 to 3 • Maximum days off capped at 15 days, regardless of prior accrued time
Administrators as Instructional Leaders	• Majority of campus admins' time spent in classrooms performing spot observations to evaluate instruction • On-the-spot coaching • In-house professional development (PD) to support instructional coaching
Reduced Consultations with Teachers Unions	• Reduced consultations with teachers' union leaders when considering changes to labor practices from monthly to quarterly
New Education System (NES)	• Scripted and timed curriculum that is on grade level featuring daily quizzes (DoL) in core subjects & push out based on DoLs (LSAE Model) • Standardized staffing model designed to let teachers focus on instruction + reconstitution for original NES schools • New salary schema with increased base salary + extended school hours

Alongside district-wide reforms, takeover leadership introduced the New Education System (NES), a school turnaround model reconfiguring instruction, staffing, and compensation. NES schools utilize district-generated scripted lessons with daily quizzes called the Demonstration of Learning (DoL) in core subjects, strict staffing model designed to maximize teachers' instruction by outsourcing non-instructional tasks (e.g., making copies, grading) to support staff (e.g., Teacher's Apprentice, Learning Coach), and higher base salary and competitive stipend, though this compensation schema is also accompanied by expectations to work extended school hours encompassing morning extra duty and weekly afternoon professional development. Twenty-eight schools were mandated to adopt NES, requiring all instructional staff to reapply for their jobs through reconstitution. That same year (i.e., SY2023-24), fifty-seven additional schools opted to become NES-Aligned (NESA), following NES instructional and staffing models without undergoing reconstitution or receiving salary increases. The following year, forty-five more schools became NES, so 130 schools, nearly half of campuses in HISD, were implementing NES by the second year under takeover (González Kelly, 2024).

Educator turnover in HISD has increased since the takeover, with half of schools experiencing principal turnover and 4,700 teachers leaving during the first year of takeover (Goodwin, 2025; Mizan & Goodwin, 2024). By SY 2024-25, HISD's teacher turnover rate was 1.7 times the state average (Goodwin & Mizan, 2025c), and one in five teachers was uncertified, doubling the number of uncertified teachers, amid broader trends in teacher shortages and reliance on certification waivers nationally (Ozebek & Rafique, 2024; Templeton et al., 2026). Superintendent Miles acknowledged elevated teacher turnover in a September 2024 presentation to the BoM, claiming that spot observations assessed "the effectiveness of teachers fairly rigorously compared to years past" and concluding, "The headline is this, though: the higher the instructional proficiency of the teachers, the higher the retention rate…*teachers that were more proficient stayed, and teachers who were less proficient left* [emphasis added]." He assured the BoM, "So over time, this is not a pattern to worry about. This is a pattern, actually, to apply." Thus, rather than interpreting heightened teacher turnover as anomalous, Superintendent Miles reframed educator departure as necessary to retain more "proficient" teachers.

By presenting educator turnover as a matter of educators' "instructional proficiency," the Superintendent evaded other reasons contributing to educator exit, namely, how changing working conditions affected educators' performance, job satisfaction, and health. This study presents a critical counterpoint to the Superintendent's analysis by not only examining factors motivating educators to leave beyond instructional proficiency, but also highlighting other consequences of takeover reforms for educators alongside teacher turnover. I center educators' narratives of their everyday classroom experiences to demonstrate how shifting contextual factors under takeover shaped individual and relational factors constituting educators' professional and personal wellbeing, an important outcome in and of itself. In doing so, I provide both a more nuanced account of educator turnover during takeover in HISD and broaden the scope of takeover ramifications to include educator health and wellbeing.

Data and Methods

This paper analyzes in-depth, semi-structured interviews with twenty-one HISD educators. Participants were recruited through fieldwork at district-sponsored events (ex., School board meetings, HISD/TEA Listening sessions, community engagement events) and community-sponsored events (ex., Grassroots organizing meetings, protests, town halls). Additionally, I utilized

snowball sampling to mitigate biasing my sample toward educators who hold strong opinions about the takeover and/or are more active and attuned to district changes. Through months of fieldwork, I realized educators' hesitancy to publicly voice their concerns and criticism of state-appointed leadership for fear of retaliation. Educators I recruited through public meetings often looked visibly more relieved once learning that interviews were anonymous,[2] and confidentiality was a recurring question during the consent process. From these experiences, I surmised that some educators refrained from attending public events altogether due to fear, so after each interview, I asked participants to refer me to people who did not attend public events. Some educators shared my recruitment flyer in a closed HISD Teachers Facebook Group, broadening my pool of potential participants.

I employed purposive sampling (Small, 2009), prioritizing variability by school NES designation (i.e., NES, NESA, newly-NES, and non-NES) as proxy for takeover reform intensity. I aimed to represent all school levels (i.e., elementary, middle, and high school) within each NES designation. As shown later, there was less variability by NES designation than anticipated. I conducted educator interviews between April-November 2024 to allow sufficient time for takeover reforms to take effect. Interviews were conducted in person or via Zoom, with in-person interviews taking place in public spaces (ex. cafés, community centers) or participants' homes to prioritize respondents' comfort and convenience. Educators were asked about their career trajectories, school experiences prior to and during the takeover, and general perceptions of HISD/the takeover, with interviews lasting 3 hours on average.

Educators' health and wellbeing were not initially covered by the interview guide but quickly became an emergent theme as educators often mentioned the mental/emotional, physical, and professional tolls they endured under takeover. I leveraged the semi-structured approach to explicitly ask probes when educators mentioned their mental, emotional, and physical wellbeing. I concluded interviews by collecting participants' demographic and background information. Participants were given a $40 cash honorarium as thanks for their time, and they selected their own pseudonyms to protect confidentiality.

Analytic Approach

Interviews were transcribed verbatim using OtterAI,[3] and transcripts were coded using MAXQDA. Data were analyzed using flexible coding (Deterding & Waters, 2021), incorporating multiple rounds of iterative coding to simultaneously employ deductive and inductive analytic approaches. I first developed index codes anchored to the interview guide. I then created analytic codes informed by Acton and Glasgow's (2015) educator wellbeing framework and emergent themes pertaining to participants' health and wellbeing, such as stress, attempts to seek physical/mental health care, and perceptions of educator professionalization/respect (or lack thereof). I wrote case memos for each participant, along with analytic memos to develop concepts related to educator wellbeing across cases. I utilized matrixing (M. B. Miles et al., 2019) to facilitate comparison across facets of educator wellbeing (i.e., individual and relational factors) by NES designation and participant characteristics. To ensure I accurately represented participants' accounts, I conducted member checks.

[2] One educator I recruited at a board meeting initially declined to participate, but then enthusiastically gave me their contact information after I told them that I would not be identifying participants

[3] Though OtterAI does include generative AI functionality, I used it strictly for transcription, meaning no AI-generated content was used as either data or for analysis.

Table 3
Participant Characteristics

	Count/Mean	Pct/Range
Average Interview Length (In minutes)	176.5	Min: 84 Max: 420
Demographics		
Race		
Asian	2	10%
Black	3	14%
Hispanic/LatinX/Chicana	5	24%
White/Caucasian	7	33%
Middle Eastern	2	10%
Biracial/Multiracial	1	5%
Afro Latine	1	5%
Gender		
Female	17	81%
Male	3	14%
Non-Binary/Queer/Trans	1	5%
Average Age	43.1	Min: 22 Max: 72
Educational Attainment		
Some College	1	5%
Bachelor's degree	8	38%
Master's degree	9	43%
Ph.D	3	14%
HISD Experiences		
Years in HISD		
Entered HISD After Takeover	3	14%
2-5 years	7	33%
5-10 years	4	19%
10+ years	7	33%
Same School Pre & Post-Takeover	12	57%
School NES status		
NES	6	29%
NESA	5	24%
Newly-NES	5	24%
Non-NES	5	24%
Teachers Union Member	16	76%
*Plans for 2024-25 School Year**		
Resigned Mid-Year	3	14%
Staying in Same School	5	24%
Leaving School, Staying in HISD	5	24%
Leaving HISD for Different District	5	24%
Leaving K-12 Teaching Profession	3	14%
Total # of Educators	21	

**Note.* These responses reflect educators' plans for the 2024-25 school year at the time of the interview. Some educators diverged from their stated plans.

Table 3 displays aggregate demographic characteristics among participants. These educators were racially/ethnically diverse, and most participants were women. The average age was 43 years, though there was a wide range, and over half of respondents held Master's degrees or higher. Participants were evenly spread across NES status, reflecting my sampling strategy. Most educators had been at the same campus prior to the takeover, though some joined HISD during the takeover. Teachers' union membership was higher in my sample than in the district, with three-quarters of participants being union members compared to around half of HISD educators (Mizan, 2024). The vast majority of participants planned to leave their school—or already left—by the 2024-25 school year.[4] The turnover rate in my sample is higher than rates reported by HISD and local news reports, which may partially reflect my decision to count those who left their school but remained in HISD. This better captures the magnitude of mobility that may be obscured when solely observing district exit.

Findings

I find that the takeover reforms constituted a drastic shift in contextual factors that, in turn, transformed educators' individual and relational wellbeing. Changes to individual factors entailed insufficient accommodations for pre-existing and emerging health conditions, elevated stress with physical and mental consequences, and doubts around professional efficacy. Educators also described how new takeover policies reshaped relational factors at school, namely, strained relationships with students, teachers, and school administrators. Though independent, individual and relational factors were interrelated and mutually constitutive. For some, the common adversity imposed by takeover reforms strengthened existing relationships within schools, but not enough to compel educators to remain. Nearly all participants mentioned adverse changes to individual and/or relational factors, but leaving their school was not a viable option for everyone. Altogether, these findings suggest that educator wellbeing is an important, but not sole, contributor to educator turnover, making it a related yet distinct consideration when examining reforms like takeover.

Changes in Individual Factors of Wellbeing

"This is the First Time It's Become an Issue": Accommodating Pre-Existing and Emerging Health Conditions

State-appointed leadership announced new expectations for teachers' conduct and PTO policy to instill a "high-performance culture" (Lodhia, 2023), which penalized some educators with pre-existing health conditions. Alex, a veteran special education (SPED) teacher at a NES school, recalled being "written up for like, the dumbest stuff," like the disciplinary memo he received for not using the special education co-teacher office. Alex provided SPED accommodations for students in the general classroom and attended each grade's professional learning community (PLC) meetings, so he was on his feet almost all day. He chose to carry his laptop and work while on the move because, "I have flat feet, so I'm like, there's no need for me to walk back and forth," electing instead to work in teachers' classrooms. This became especially important when the SPED co-teacher office was moved such that it was no longer centrally located, thus increasing Alex's walking distance.

[4] Some participants still faced uncertainty about what their plans for the following school year would be, especially among those who were notified they were being recommended for termination. Others ended up diverging from their stated plans. These responses reflect participants' *intent* at the time of their interview.

After receiving the write-up, Alex told his principal about his flat feet, recounting, "They [administrators] started this new thing of, [in condescending tone] 'Well, do you have an ADA [American with Disabilities Act] letter for that?' I said I can get one. I said, this is the first time it's become an issue." In his prior two decades working in multiple HISD schools, Alex's flat feet had never been deemed as impeding his performance. Yet the new demands imposed by state-appointed leadership now rendered Alex's pre-existing condition worthy of disciplinary action.

Though intended to curb excessive absences, stricter PTO enforcement left some educators worrying about how to manage emerging health complications without jeopardizing job security. When Cecile, a teacher at a non-NES school, received her cancer diagnosis in December of the first year under takeover, she was concerned about new district directives relayed to campus administrators. "Every two absences that a teacher had, you, we would have to start getting written up for it," she remembered her principal telling teachers, and school administrators were "to give information to Central Admin about teacher absences thus far," adding, "At that time, they were saying if you've used half of your [PTO] days by October…or by February, you're going to be fired." Leading up to her diagnosis, Cecile "missed a lot of like, partial days to like, deal with appointments here and there" while being "on medications and on infusions every day," meaning she accrued half her PTO days by December. Fortunately, Cecile's principal interpreted the district's PTO policy as only reporting *full* days Cecile missed, thereby undercounting her total PTO use. This highlights the crucial role of campus administrators' discretion in balancing state-appointed leadership's stringent expectations for educators' conduct with educators' pre-existing and emergent health conditions.

Though Cecile's administrators willingly reinterpreted PTO guidelines to accommodate, this was not the case for everyone. As a thirty-year veteran at her school, Peggy was one of few NES educators who returned after her school faced reconstitution. Peggy's adult daughter was diagnosed with cancer the year prior, and she "did not have a problem with the admin" when taking time off to provide care last year. She continued to care for her daughter after the takeover, but "this year, it would become a problem when you took too many days off." At first, Peggy filed for time off through the Family and Medical Leave Act (FMLA), but she was denied multiple times for various reasons, like sending in the incorrect form, not qualifying because her daughter was an adult (despite a doctor's note confirming her daughter needed assistance while recovering from surgery), and not meeting the 1,250 hours of work eligibility.

Instead, Peggy used banked sick days accrued over her years of service to care for her daughter after surgery, reasoning, "Since I couldn't get FMLA, I said, okay, I'm still gonna take my days off because I have to go, right?" She began receiving repeated emails from her principal for taking more than fifteen PTO days, detailing:

> This is to notify you that, you know, your FMLA was denied, and I, and I'm out of compliance, and I need to report to work… You know, as much as I would like to comply, you know, I mean, I'm out of state, and I'm helping my daughter…So I got letters, like "failure to report for duty."

When we spoke, Peggy was waiting to hear back from the Department of Labor about an investigation she submitted regarding her FMLA denial, flipping through a thick white binder filled with documents she compiled for the complaint, a literal record of her decades in HISD. While Peggy faced severe consequences for breaching PTO guidelines introduced under takeover, her

experience, alongside those of other educators, demonstrates how rigid implementation and enforcement of new reforms burdened educators' existing and emerging health-related issues in ways that had not been an issue in prior years.

"Delivering Content Every Second of Every Day": Increased Stress Impeding Physical and Mental Health

One priority for state-appointed administration was recruiting and retaining educators who demonstrated "instructional proficiency" and commitment to delivering "high quality instruction" (M. Miles, 2024). This section explores the mental and physical toll educators faced while executing the Superintendent's vision of takeover reforms.

Mr. Pickles was once a newcomer immigrant student in HISD himself, working as a clerk at an HISD school to assist Emergent Bilingual students preparing for the Language Proficiency Assessment Committee (LPAC). "I know how students feel when they don't speak no English because I was one of them," he said, and he delighted in helping out where he could, like transitioning students from breakfast in the cafeteria, providing translation for Spanish-speaking parents, or chaperoning after-school enrichment activities, especially when he could clock overtime. Mr. Pickles' tone shifted when speaking about the current year, emphasizing, "It's been different this whole year compared to my previous years working in HISD."

To begin, Mr. Pickles had to reapply for his job over the summer because his school became NES, a "moment of shock" that made him "so stressed out." Luckily, Mr. Pickles returned to his school as a Learning Coach, monitoring students in the Teams Center as part of the NES model. Implementing NES posed challenges, particularly his role of ensuring that students placed in the Teams Center for classroom disruption rejoined the lesson virtually via Zoom. Mr. Pickles found himself assigned more tasks because of his technological expertise. "I have more than ten titles, and I'm only getting paid for one," he remarked, listing off new additional responsibilities, like managing "password reset, technology inventory, Raptor, LPAC, Gifted and Talented records, a school website." Mr. Pickles had taken on extra duties in prior years, but when describing his ever-growing list of tasks since the takeover, he reflected:

> Trust me, I used to leave the building overwhelmed. I was stressed, a headache. In the beginning of the year, I used to be super happy to go to work. Nowadays, it's like a challenge for me to wake up every day.

The NES model restructured staffing configurations at these schools, introducing new roles, like Learning Coaches, and removing campus-based tech support. Educators like Mr. Pickles assumed these responsibilities, which affected his mental wellbeing and job satisfaction. While some educators resigned mid-year in response to work intensification, thus increasing the workload for their remaining colleagues, this was not an option for Mr. Pickles, who admitted, "I went through with it because I needed the job and the paycheck—I had bills to pay."

Unlike Mr. Pickles, Frances retained the same position, but she, too, noticed different expectations for teachers compared to her prior five years at her campus. Although her school was not declared NES until the following year, Frances now had to display learning objectives (LO) and the Demonstration of Learning (DoL) on her board every day—a criterion on spot observations introduced under the takeover. "I have four preps, which means that's like four DoLs, and four

lesson objectives, and four lesson plans for the week. And it's like, I can't do that. Like, that's too much work," she exclaimed. Moreover, Frances found this requirement arbitrary, adding, "It's not actually helping my kids learn, and I'm staying up late at night to get it done." For Frances, these additional responsibilities prioritized superficial compliance (i.e., how her whiteboard is organized) over the substantive content of her pedagogy, creating unnecessary busywork that disrupted her work-life balance and sleep schedule, with no meaningful benefit to her students' learning.

For some educators, intensified work expectations and responsibilities wrought elevated stress and physical symptoms. Having successfully found his niche in college preparation and scholarship applications, Kirk was excited to "set up shop" and build a business program at his new campus. "That didn't go like it was supposed to. The district takeover just made it impossible to really do anything," he retorted, even as his new school was non-NES. The district's insistence on delivering bell-to-bell instruction left Kirk feeling like, "We had to be delivering content every second of every day, which is just fucking exhausting and completely unsustainable." In prior years, Kirk would occasionally employ bell-to-bell instruction during exam prep, but maintaining that intense pace every day had him "waking up in the middle of the night for like, a week straight, throwing up, cold sweats. All that stuff. I started throwing up blood, and I'm like, nah, I'm out." When he resigned in October, Kirk shared:

> When I got out of teaching, like, I had a lot of like, little tiny physical aches and pains in my body, like you know, a little pain in my hip, pain in my toe, pain in my thumb, pains in my neck. All those went away after like a month. Like physically, I put on a few pounds… I feel so much better.

Another new expectation was that teachers remain standing during the entire class period. Dr. Second Chance meticulously detailed her schedule, calculating how she stood for 315 minutes straight every day between her 100-minute classes and hall duty during passing period ("I've added this up," she assured me). An older educator in her sixties, she insisted, "I tried to do it. I couldn't," delaying knee surgery and telling her appraiser, "I have to sit down sometimes. I cannot stand the whole time." Her district administrator continued to penalize Dr. Second Chance on her spot observations for sitting, despite being informed of Dr. Second Chance's physical state by her campus appraiser.

In past years, Dr. Second Chance received regular knee injections after school to stand as much as she could during class. However, when her school opted into NESA, it extended work hours, starting as early as 6:15 am or as late as 5:30 pm on some days, so after-school appointments were no longer possible. Dr. Second Chance took time off during school hours to schedule her knee injections, which did not go unnoticed. During her mid-year conference, her appraiser informed her that her absences were hindering her professionalism. "So basically, my professionalism was being affected because I had to go to doctors' appointments to get injections in my knees so I can stand for your classes," she explained incredulously, pausing before asking, "Does that make sense?" She wore knee braces to school every day to stay standing, until the school had to call an ambulance when she went numb on her left side and hip. Though initially thought to be a heart attack, Dr. Second Chance later discovered the incident was because she pinched a nerve by wearing her knee braces for too long. She listed other physical symptoms of stress from this year, such as persistent nightmares, disrupted sleep, foot cramps, and weight gain, murmuring, "It's been rough. It's been rough."

Conditions as grave as Kirk's and Dr. Second Chance's were relatively rare, but these accounts demonstrate the mental and physical consequences that state-appointed leadership overlooked when assessing reform efforts. Though uncommon, such experiences drastically deteriorated these educators' health compared to their prior years in HISD.

"Am I a Good Teacher?": Questioning Professional Identity and Efficacy as Educators

Like any profession, career satisfaction and sense of competence play an important role for educators' welfare, persistence, and success in schools (Martin & Benedetti, 2025; Nguyen et al., 2020). Rigid adherence to a particular paradigm of educator professionalism under the takeover altered some educators' perceptions of their professional identity and efficacy, impacting their wellbeing. Returning to Dr. Second Chance, her experiences of being admonished for her knee problems made her waver:

> This is the first year, first year, I've ever asked myself, am I a good teacher?...Maybe me being a good teacher is over, because Lord knows I don't have the strength to walk around for an hour and a half every period. I just don't…I cried more times this year than I have in my life [Pauses, voice hoarse] And I questioned myself more than I ever have.

When starting at her school three years ago, Dr. Second Chance thought, "That was where I was going to retire." However, after her administrators suggested not renewing her contract due to her absences, Dr. Second Chance positions in neighboring districts, all the while questioning, "Do I teach with the same quality I used to? Because I know I was a good teacher. I know I was. I don't know if I am anymore."

Frida, an educator at a newly-NES school, described similar self-doubts. After a career in healthcare, Frida developed a passion for working with newly immigrated students. An ESL teacher in a Title I school and immigrant herself, Frida knew her students worked late to support their families, often granting leniency when they fell asleep in class. Her new principal, however, maintained a stricter approach, and she described an incident during a classroom observation in which she witnessed her principal "raise his hands and slam the desk" of a student with their head down. "That sat with me for weeks," she said, holding back tears:

> I didn't do anything to protect that kid, and that's my number one role. And I told myself, regardless of what happens in HISD, my focus is my classroom. That's all I can handle, and I couldn't even do that. I couldn't even protect my kids.

The district's open-door policy under takeover exacerbated Frida's concerns about her students' safety in the event of school shootings or students bringing weapons to school, recalling when a SPED student ran into her classroom, scaring everyone, including themselves, "because my door was open." Frida's main priority as an educator—providing a safe learning environment that protected her students—diverged from state-appointed leadership's narrow focus on student performance metrics. This rift undermined Frida's sense of professional efficacy, for what she valued most was at odds with district directives under takeover.

Changes in Relational Factors of Wellbeing

"You Couldn't Get to Know Their Names": Strained Teacher-Student Relationships

Teacher-student relationships and interactions are pivotal to educators' school experiences. State-appointed leadership's push to maximize instructional time in the classroom meant educators had few, if any, opportunities to intentionally connect with their students. Before the takeover, Rebecca designed lesson plans to get to know her students during the first weeks of school, even if that meant covering less content, because she knew that if students "don't like you or the lesson, they're going to shut off." Some of her go-to get-to-know-you activities included having students write poems using their names or anonymously sharing something about themselves, using an iceberg as a metaphor for what might be readily visible versus what lies hidden beneath the surface. These lessons introduced ELA concepts like poems and metaphors, set community expectations of empathy and compassion that were key to Rebecca's classroom practice, and signaled to her students her care for them as whole people.

Rebecca missed the first two weeks of school during Takeover Year 1 due to a health emergency, but she heard from colleagues that "not even the teachers who were here on the first day were allowed to do first-day activities. You couldn't get to know their names…It's bell-to-bell instruction, following the slides, doing the lesson from day one. No get-to-know-you activities." Throughout the year, she noticed fewer students joking with or confiding in her about everything from upcoming baseball games to being bullied, remarking, "I didn't get as much of that this year." Even as Rebecca offered her delayed start or this being a "different crop of kids" as potential explanations, she also suspected other takeover-related changes were contributing to this difference. For instance, she had students do less journaling because she felt pressure to adhere to the NES curriculum, despite her school not being NES that year. Rebecca admitted, "Maybe I was less open because I had to be like, expecting the principal to walk in all the time," which made her more wary, adding, "The bond was not right." These distant relationships with students made Rebecca feel, "like I was doing them a disservice if they didn't feel comfortable with me, that I was not giving them the best experience that they could have." This mattered to her because she saw "helping these kids develop into the adults that they're going to be" as her core role as a teacher, not just delivering content. Thus, quality student relationships were not only a precondition for engaging students pedagogically, but also necessary for Rebecca's own professional efficacy and wellbeing as an educator.

Unlike Rebecca, Kirk had not given student relationships much weight in the past, but the new expectations to always perform bell-to-bell instruction made him reconsider:

> Because we were throwing so much at the students, we never got the chance to form relationships with our students, which I always thought was bullshit. But after this year, I was like…all they saw was some White dude who's just throwing work at them nonstop because if he doesn't, he loses his job. So we lost the kids immediately.

On a practical level, lacking these bonds while simultaneously demanding more work fostered an antagonistic dynamic between Kirk and his students. When he resigned, he realized, "I didn't know a damn thing about any of them. They didn't know me. I was fighting them at every turn."

State-appointed leadership relied more heavily on educator removals, reassignments, and terminations to enforce compliance with reforms, and many participants expressed fear of being removed not just because it jeopardized their own job security, but also because their absence would have ramifications on their students. An outspoken critic of the takeover and state-appointed administration's reforms, Mary, a decades-long educator at a non-NES school, was removed from her classroom mid-year for her advocacy on social media. Though she was not surprised by her

reassignment, her removal was "devastating" for her students. She recalled a conversation with a parent whose daughter was distraught by Mary's removal from the classroom. "I found myself apologizing," she sighed, "but I just had to make the decision, and they [my students] lost. And that's the sad part about it, that they lost that day." Being ripped from her students contributed to Mary's decision to leave teaching and devote herself to advocacy,[5] explaining, "I don't want to ever go through that again." Even when educators managed to form tight bonds with their students, the looming threat of removal tinged these relationships with precarity.

"Nobody Wants to Talk to Each Other": Strained Teacher-Teacher Relationships

The takeover was controversial from the outset (Dawer, 2025), and contention grew after state-appointed leadership took the helm and enacted reforms. These entrenched divisions among HISD stakeholders seeped into educators' relationships with their colleagues. Mary thought the takeover made "teachers became very suspicious of one another," admitting, "I know, even myself, I didn't trust people…I knew anybody that aligned themselves with Mike Miles wasn't a friend of the teacher." For her, backing the Superintendent became a new dividing line to determine who could be trusted.

The introduction of Teacher's Apprentices through NES was another point of friction. Teacher's Apprentices were to assist teachers or be substitutes when necessary, and this position did not require teaching certification. When Jamaica received notice that her contract at her NES school would not be renewed the following year, however, she suspected her administrators were trying to replace her with a Teacher's Apprentice. "It's not fair because at the end of the day, they're gonna have incompetent people working there because they're not certified," she lamented. Jamaica's students corroborated her suspicions, writing a statement on her behalf that she read aloud during our interview: "Yesterday, [Teacher Apprentice's name] was throwing shade to [Ms. Jamaica]…She said [Ms. Jamaica] is not coming back, so you better get used to me being your teacher." Jamaica's account highlights recurring concerns participants raised about competing with Teacher's Apprentices for employment, who they deemed unqualified compared to certified teachers. This sense of replaceability by uncertified teacher's apprentices grew when Jamaica saw postings for her job at job fairs, despite being told her position had been removed due to budget shortfalls, scoffing, "How's that supposed to make you feel?" Altogether, this created a cutthroat environment hindering collaborative coworker relationships for Jamaica, where teachers would "stay away from each other" because "trust is broken."

The increased compensation offered at NES schools was another factor affecting educator relationships. Ms. Frizzle joined an NES school in 2023 to "be somebody within, from the inside helping kids" because she doubted the takeover and NES. She questioned whether other teachers at her school were "here for the right reasons," particularly when she heard colleagues make statements like, "I can't wait for my next stipend," or "I'm just here chasing the money" in "casual conversation, possibly four times a week." She continued, "Everyone walks around with this idea of like, yeah, the kids are bad, but I'm just here for that stipend." Ms. Frizzle's distrust of her colleagues deepened whenever she saw teachers uncritically implementing the NES curriculum, which "doesn't make any sense" to her, given her own training as an educator. She attributed teachers' compliance

[5] At the time of our interview, Mary indicated that she would not be returning to the classroom. However, when I saw her again at the start of the following school year, she admitted that she had returned as an HISD teacher, in large part because of her love for working with students. She is still outspoken in her advocacy.

with a flawed pedagogical model in her view to the financial incentives offered through NES, even calling out a colleague for having a "slave mentality of, the money is so good that I'm gonna do whatever," when he proclaimed he was "just doing it for the money." Educators like Ms. Frizzle thought the takeover reform compensated compliance over competence, leading them to dispute colleagues' professional judgment, or lack thereof.

CJ had a high sense of belonging at her school prior to the takeover, where she had worked for eighteen years among faculty that "always felt like a family…I feel like I'm woven into the fabric of that community." Although her school faced few staffing changes during the initial takeover transition, the new reforms and additional responsibilities, namely frequent spot observations and adherence to the NES model (regardless of the school's official NES designation), created an atmosphere of "surveillance" from the district. "Miserable! It just feels like there's just a complete lack of trust," CJ huffed, describing how this increased scrutiny created pervasive tension among her previously close-knit colleagues:

> I just feel like when I walk out of my classroom…even the people that I know and love, like, nobody wants to talk to each other. It doesn't feel comfortable. It doesn't feel happy. The people I've known and loved for forever, all of us kind of keep to ourselves now. It's very weird, and it just, it just has severed, like, some really good relationships.

CJ chose to leave her school before it became NES in the 2024-25 school year, asserting, "This takeover…is totally, hands down, absolutely, the reason why I'm leaving." The takeover ruptured relationships with her colleagues that had motivated CJ to remain at her school for so long, ultimately leading her to decide to leave.

Frida also described her school and colleagues as a "family," having purchased a home within the school's zone because she felt so committed to this community. Yet, as with the pandemic, the takeover revealed "a lot of heroes and a lot of zeroes" among her coworkers under increasingly punitive conditions. This transformed how Frida showed up to school:

> I would walk around that hall just angry. Only people that could bring a smile on my face was those kids. I did not trust those adults, not one of them…because I felt like any minute, they would turn their back on me. They would throw me under the bus. They would throw each other under the bus. I was done…I was like, I gotta get out.

This persistent hostility robbed Frida of her "sunshine," her namesake. "It was a combat zone for me every day. I felt adrenaline. I felt like I was on like, this cortisol, like, on edge just constantly," she said in a trembling voice. School became a toxic work environment that not only tainted her relationship with fellow teachers but also impaired her mental wellbeing, precipitating her resignation and subsequent treatment for post-traumatic stress disorder.

"You Should've Not Agreed to be a Person Who Tells People to Jump": Strained Teacher-Administrator Relationships

School leaders play a crucial role in influencing teacher satisfaction, school culture, and student outcomes through building trust among educators and generating buy-in for shared instructional goals (Bryk et al., 2010; Martin & Benedetti, 2025). Takeover reforms positioned school leaders, particularly principals and assistant principals, as instructional coaches, requiring them to conduct

multiple classroom spot observations every day. These spot observations and accompanying on-the-spot coaching fundamentally reshaped campus administrators' interactions with teachers, especially when the feedback they were expected to provide by district leadership did not align with teachers' own pedagogical approaches.

Before the takeover, Fawkes eagerly invited administrators to improve as a budding teacher. He enthusiastically recounted how he asked his appraiser to observe his lesson, but "the lesson started to fall apart" halfway and ended with him "curled up in a fetal position on the floor" afterwards because he "bombed it so hard." Grinning, Fawkes described how his administrator provided encouragement, assuring, "Maybe it didn't go great, but I'd rather see my teachers try new stuff than doing the same boring thing every day. So honestly, count this as a win." This was "liberating" for Fawkes, where school "felt like a real institution of learning, where teachers and students are learning just as much about this whole process together."

Fawkes' school experienced drastic administrator turnover after state-appointed leadership reassigned the principal, leaving the remaining administrators under pressure to obey district directives. To Fawkes, the spot observations amounted to "just looking for checklist stuff," a "crass and pointless" routine his admin had to perform, and he, "in order to protect them…had to pretend like it wasn't crass and pointless too." However, Fawkes could endure this façade for so long:

> They're like, "My job depends on you saying, 'How high?' when I tell you to jump." And I'm like, "I don't, I don't really fucking feel like jumping anymore." And they're like, "Well, if you don't jump, I'm gonna look bad because my job is to make you jump." And I'm like,…"You should've not agreed to be a person who tells people to jump."

By creating an environment pairing arbitrary demands with punitive compliance, the takeover reforms soured the collaborative relationships Fawkes previously had with his administrators.

TJ, an educator at a NESA school, received low spot observation scores all year. "I've been being retrained in front of my students how to do it 'right,' which is very draining," she sighed. This "retraining" entailed being nit-picked for not using the digital timers featured in the NES slides, or which prescribed student engagement activity to use every four minutes. These constant interruptions from her appraiser undermined TJ's ability to teach to the extent that her students would tell her, "If you need to leave this year, then we will understand. We want you to stay, but if you don't want to stay, then we understand why…because I wouldn't put up with that."

Outside the classroom, TJ began recording her meetings with administrators, a strategy mentioned by multiple educators, citing, "They won't follow up in email because…they don't want anything in writing." In one instance, she approached an administrator during their weekly professional development regarding an email exchange, where the administrator indicated that TJ misunderstood points from their earlier meeting but offered no further clarification when asked to explain. Re-enacting their conversation, TJ mimicked, "You writing things down in email, that's like you're telling me that I'm not doing my job well. It's like you're telling me you don't care if I lose my job, and I don't get to feed my kids." This reaction shocked TJ, who thought, "Oh my god, you're gaslighting me," and with tears in her eyes, she said she "went to my doctor and got my meds upped so that I would…" chuckling ruefully as she trailed off. Incidents like these were why TJ thought there was "a massive level of distrust" between teachers and administrators at her school, straining

her relational wellbeing and her mental health, as she increased reliance on anxiety medication to cope.

Having strong relationships with administrators also posed challenges, since state-appointed leadership could remove administrators at any time. Cecile, who felt appreciative toward her admin for protecting her health-related absences, worried, "Everybody's walking on eggshells. We, as a campus, have recognized that anything that a student or teacher does that the district doesn't like can blow back on our admin." She thought this explained the "silence" among teachers at her school, "for fear of adversely affecting our admin because we don't want our admin to be removed." For Cecile, strain on her relational wellbeing concerning admin came from threat of removal rather than negative interactions.

"We Have Each Other's Back Even More": Strengthened Relationships and Trust

Shared adversity during the takeover led some participants to report strengthened relationships within their schools, a phenomenon Fawkes described as relationships formed "out of necessity, like an oppressed community banding together" or "trauma-bonded" to survive. For Ruby, this became evident when her school's long-time principal, who "knew every single kid's name" and was a "great role model" as a Hispanic, male educator, was suddenly reassigned. Her students started begging her, "Miss, please don't leave," because she became "the familiar face…the safe person that they can come and talk to." She sensed her connection to students became "a lot more closer [sic] this year after we went through that."

Similarly, teachers at Krista's NESA school "have each other's backs even more now because it's been so stressful." The PLCs that Krista once thought were a "waste of time" in prior years due to not having grade or subject-area collaborators at her small school, became spaces where teachers could "talk and enjoy each other's company and kind of mock the curriculum and talk with each other about how to change the slides so they better meet the needs of the students."[6] She affirmed, "I've always had great colleagues, but this year, we're closer" because they could support and commiserate with one another. Krista described her relationship with her administrators as going "up and down" in the past, but she valued her principal's honesty and transparency in communicating her own constrained agency when implementing district mandates under takeover, affirming, "I feel so blessed to be on this campus versus other campuses."

Despite improved relationships with her teachers and administrators, however, Krista left her school of seven years to teach in a district closer to home. Distance played a key role, but Krista's decision was also motivated by increased stress from spot observations and continuously changing expectations "gaslighting you to the n-th degree." Krista's trajectory demonstrates how positive changes to educators' relational factors alone can neither ensure their wellbeing nor compel them to stay when faced with other takeover reforms.

Conclusion

[6] During the member check, Krista clarified that she still thought the PLC during the takeover "was a waste of the little time we had to fix everything that was wrong with the curriculum that was provided. It required many hours outside of PLC to achieve that."

Leveraging Acton and Glasgow's (2015) framework for educator wellbeing, this paper analyzed interviews with HISD educators to examine changes in their mental, physical, and relational health during the transition to takeover. I argued that the takeover reforms constituted a shift in contextual factors that shaped educators' individual and relational wellbeing at schools. Educators noted how these changes transforming PTO policies, professional expectations, and evaluative observations precluded accommodations for health conditions, intensified workload without providing meaningful benefits to their students, and challenged notions of their own professional identity and self-efficacy. These reforms also transformed their relationships at schools with students, fellow teachers, and school administrators. Some faced strained and/or deteriorated relationships due to increased scrutiny and compliance, while others reported strengthened bonds as a survival response to the pressure from state-appointed leadership.

Furthermore, centering educator's health and wellbeing revealed not only how educators experienced reforms while in the classroom but also how their mental, physical, and relational conditions motivated some educators to leave but not others. This paints a more nuanced account of elevated turnover during early stages of takeover (K. Buras, 2015; Kitzmiller, 2020) by simultaneously considering explanations that are obscured when uncritically relying on "instructional proficiency" at face value while challenging assertions that only educators with minimal or positive experiences choose to stay. How state-appointed leadership continues to alter policies to influence educators' working conditions, and how these changes shape educator turnover remains to be seen. These findings spanning transition to takeover reveal that educator wellbeing and turnover, though related, are distinct; examining turnover alone overlooks how the takeover has influenced educators' schooling realities, neither capturing the experiences of educators who stay at their schools nor those who move campuses but remain in the district.

This article provides two contributions to scholarship on takeovers and educator wellbeing. First, it presents educator health and wellbeing as a potential mechanism underlying takeovers' null effects on student outcomes (Schueler & Bleiberg, 2021; Schueler et al., 2025; Wong & Shen, 2003). As such, studies examining takeovers should expand the scope of consequences assessed under this increasingly popular policy beyond narrow student achievement measures. Second, this study extends literature on educator wellbeing by explicitly focusing on how contextual factors, namely takeovers, shape educators' individual and relational health and turnover (Acton & Glasgow, 2015; Nguyen et al., 2020). Interrogating the relationships between these independent, interrelated dimensions deepens theorizing on educator wellbeing as a whole.

This study faces key limitations. While educators shared extremely personal accounts of their physical and mental health, they represent a small subset of the 14,000 teachers, administrators and instructional support staff in HISD, meaning their narratives are not representative. Rather, I present findings not for their generalizability but to demonstrate how systematic analysis of educators' experiences yields other avenues for studying takeover consequences. Future research could more concertedly focus on educators' wellbeing during takeover at a larger scale to evaluate potential implications for occupational and public health, as school districts are often one of the largest employers in the local economy. This paper also does not seek to make direct causal claims between educators' wellbeing and students' experiences and performance in the classroom. Though this paper prioritized educators' wellbeing as a meaningful outcome in and of itself, future work should prioritize students' perceptions and perspectives during takeover, especially their interactions with teachers. Lastly, I consider educators' wellbeing during the early stages of takeover rather than making claims about long-term consequences, though these short-term experiences offer precursors

to future outcomes. More work is needed to examine the longitudinal changes this takeover has on HISD stakeholders, especially given the ever-changing nature of district policies and turnover rates.

Nevertheless, these findings hold important implications for policymakers and practitioners. Conceptualizing takeover as a shifting contextual factor underscores policymakers' role in shaping educators' individual and relational wellbeing. Therefore, policymakers should consider how large-scale policy interventions, like takeovers, affect educators' mental, physical, and relational health, especially amid persistent teacher shortages. Educator turnover represents an important proxy for teacher satisfaction, but as employers, districts must recognize this is a preliminary and lagged measure that does not fully capture their employees' stress, wellbeing, or sustainability while in the workplace.

To quote Cecile's advice for fellow HISD educators, "When it comes down to it, you always need to prioritize your health and safety," conditions she did not currently see in HISD under takeover. "We all need to prioritize, you know, our health and what will make sure that like, we can move on after it, you know? Like, I want to stay in education." Like many, Cecile looked forward to the day when she could "move on" from the disruptive takeover reforms, and prioritizing her health was pivotal for her ability to "stay in education." Thriving schools promoting engaged student learning require an educator workforce that feels safe, supported, and healthy. Researchers and policymakers should heed Cecile's advice of attending to educator health and wellbeing when implementing and evaluating policies that lead to sustainable improvement for all district stakeholders.

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The Broad Academy at Work in the Houston ISD State Takeover

SARAH RIVLIN

Abstract

A Houston Independent School District (HISD) teacher compares HISD under Mike Miles, the state takeover superintendent who trained at the Broad Superintendents Academy, to a previous teaching experience at a campus also influenced by the Broad Academy. Both Miles' HISD and the former Broad campus feature the military-like discipline, overwhelming focus on standardized testing, and high educator turnover typical of Broad leadership. The editorial describes how the Broad Academy trained school leaders, including Miles, to disrupt, dismantle, privatize, and monetize public schools. According to the editorial, Houston has a unique organizational infrastructure around public schools that is allowing it to effectively fight back against Broad influence. To build the power to defeat Broad leadership, the editorial recommends that civic groups train individual educators, students, and parents at the campus level to organize their peers and then form educator/student/parent community coalitions which can spread outward to other campuses.

Keywords: Broad Superintendents Academy, community coalitions, Houston Independent School District, state takeover

Introduction

I am a former Houston Independent School District (HISD) teacher. When I first learned that Mike Miles, the state-appointed superintendent of HISD, had graduated from the Broad Superintendents Academy (Samuels, 2011), my heart sank. In my first HISD teaching job back in 2013, I saw firsthand how harmful the Broad Academy's philosophy is. I was concerned that a Broad-trained superintendent like Miles would push that philosophy onto the entire district.

The Broad Superintendents Academy, now dissolved, was a controversial, unaccredited training program for public school leaders, funded by the late billionaire Eli Broad. Broad was a venture philanthropist (Kumashiro, 2012) who intentionally used his philanthropic spending to steer public education in the direction of privatization (Baltodano, 2016). His goal was to place "Broadies" (Broad graduates) into as many major urban public school districts as possible.

Broad believed in using the business strategy of "disruptive forces" (*The New York Times Magazine*, 2008) to shake up urban public school districts with the stated aim of improving them. Broad's methods, though indeed disruptive, have not been successful in improving districts, only in privatizing them (Dee et al., 2020). A public school parent described the remarkably consistent Broad playbook back in 2011 by saying, "A hallmark of…Broad-style leadership is closing existing schools…opening charter schools [and] imposing high-stakes test-based accountability systems…The brusque and often punitive management style of Broad-trained leaders has frequently alienated parents and teachers and sparked protests" (Higgins, 2011).

My initial fears about Miles were well-founded. As I will argue in this paper, the first two and a half years (2023-2025) of Miles' superintendentship have demonstrated the Broad Academy's influence clearly. HISD has experienced many of the same types of Broad-style disruptions described by the parent above, but what distinguishes HISD from other Broad-run districts is the unrestricted power

enjoyed by its superintendent. Without an elected school board or the possibility of relief at the state level, HISD has become the living embodiment of Eli Broad's vision for public education in America.

My concerns about the Broad Academy's influence are based on my direct experience as a teacher. Ten years before Mike Miles came to HISD, I had my first encounter with Broad's disruptive philosophy. In 2013, I accepted a teaching job at an HISD school where 93% of the students were classified as economically disadvantaged. Right away, as soon as the school year started, I was taken aback by the toxicity of the environment and the cruel treatment of students (Rivlin, 2023). The school was a test prep factory, run like a prison. Given what I was witnessing, I was shocked when I learned that HISD had won the 2013 Broad Prize from the Broad Foundation (Maxwell, 2013) and that my school had also won a prize because it had been one of the showcase schools that had allowed the district to win. It was only later I understood that the school had won *because of* and not in spite of its toxic, prison-like environment. My school was Broad-approved.

Military Discipline

One documented aspect of Broad leadership is its militaristic discipline. Baltodano (2016) states, "A common trait of leadership programs financed by the Broad Foundation is the clear link they made between the discipline of the market and the harsh discipline of the military" (p. 145). Harsh military discipline is exactly what I witnessed at my Broad showcase school. My students went the whole day without any break except for a 20-minute lunch, where they sat at assigned tables. If they were loud, the punishment was "silent lunch." They could not go to the bathroom during a 90-minute class period. Adults yelled and used physical intimidation to maintain order. I once watched a school officer handcuff a tiny girl while an administrator three times her size screamed at her.

Now, under Miles, military-style discipline also pervades many HISD campuses. There have been reports of students expected to walk in single-file lines in the hallways with adults yelling and shoving if they stray (Clarke, 2024). Even very young children are required to sit still for hours (Bikomo, 2025), and bathroom access is severely restricted (Partain, 2025c). Additionally, mass suspensions have been used to maintain order during student protests, such as at Madison High School (Grunau, 2024) and Northside High School (DeGuzman, 2025).

Standardized Testing

At my Broad showcase campus in 2013, the State of Texas Assessments of Academic Readiness (STAAR), our state standardized tests, dictated everything. We administered countless STAAR practice tests. I was once pulled out of my room and reprimanded when an administrator caught me allowing my students to read real books instead of STAAR test prep passages.

In HISD under Miles, test prep also dominates the mandatory district curriculum (Bikomo, 2025). In 2024, Miles explicitly stated in an interview that "full books" would not be read during the school day (Walsh, 2024). Like my former students, in place of books, HISD students currently practice their reading skills using STAAR test-like passages and teachers teach books at their own risk (Falkenberg, 2025).

At my campus in 2013, the preoccupation with STAAR also meant that certain subjects were prioritized over others. Because they were tested, English and math took precedence over the other

subjects, especially "non-academic" ones such as the arts. Students took English and math for 90 minutes instead of the 45 minutes they had for other subjects. In the most extreme cases, my students in special education who had failed the STAAR test were required to take three hours of English instruction every day, taking two extra English classes instead of art, band, or PE.

Mike Miles has likewise shown a disregard for anything considered non-academic. From the beginning, he has weakened and cut arts programs (Partain, 2025b) and eroded recess for elementary school students (Bauman, 2023). He compensates English and math teachers significantly more than he does other teachers (Lehrer-Small, 2023).

Mental Health

At my former campus, the social-emotional needs of students took a back seat to test prep. Many of my students were cutting themselves. One girl whispered to me in the back of the room during a practice STAAR that she was suicidal. The counselor could not see her for several days due to STAAR preparations. Administrators would not change a bullied student's schedule because the disruption would interfere with STAAR.

This same rigid test prep environment is also taking its toll on the mental health of HISD students under Miles. At an off-campus student panel in 2024, several HISD high school students stated that they and their peers were experiencing serious mental health repercussions because of the conditions at their schools under Miles, and one student said that she had been suicidal (Clarke, 2024). It was not clear if any of these students had received mental health support at school.

Effects on Educators

In addition to taking its toll on students, the Broad philosophy does serious harm to educators. One of the most common and easily recognizable outcomes of Broad leadership is unusually high teacher turnover. When I left my Broad showcase campus at the end of the 2013-2014 school year, almost half of my colleagues left with me. It is not a coincidence that during that same time period, Broadie Mike Miles, who was then the superintendent of the Dallas Independent School District (DISD), drove a record number of DISD teachers to quit (Lopez, 2023).

In Dallas, Miles' implementation of the Broad philosophy was restricted by an elected school board, but in Houston after the state takeover, he has had no such restrictions. During the 2023-2024 academic year, HISD lost 10,000 employees, including 4,700 teachers or 42% of the teaching force (Mizan & Goodwin, 2024). In 2024-2025, the teacher turnover rate in HISD was 32.2%, 1.7 times higher than the state average (Goodwin & Mizan, 2025).

Families and The Community

The disruption that characterizes Broad schools inevitably extends to families and to the taxpaying community as well. Higgins (2011) once again offers insight from her experience as a parent after she watched three successive Broad-trained superintendents in a row leave her district in "financial shambles":

> One of the tenets of [Broad's] philosophy is to produce system change by "investing in a disruptive force." Continual reorganizations, firings of staff, and experimentation to create

chaos or "churn" is believed to be productive and beneficial, as it weakens the ability of communities to resist change.

Miles began to sow chaos in HISD from the very start, requiring employees from 29 campuses to reapply for their jobs, firing hundreds of central office workers, shaking up district leadership, and implementing drastic program changes right before the school year started (Sessions, 2023b). Right away he was reckless with the district's funds, doling out $10,000 stipends to educators from 57 campuses to lure them into his Broad-style New Education System (NES; Menchaca, 2023) and spending an estimated $484,500 on roomfuls of spin bikes for his controversial Dyad program (Downing, 2023b).

Privatization

Like all Broad-trained superintendents, Miles' chaos makes sense in light of a push for privatization (Ultican, 2019). Chaos means HISD is open for business. Broad-style venture-philanthropists such as Good Reason Houston are lining up to donate (Houston Community Voices for Public Education [Houston CVPE], 2024). Vendor contracts receive very little if any oversight from the Board of Managers (ABC 13, 2023; Gardner, 2025), and consultants are making a killing (Mizan, 2025a).

Perversely, Miles has a financial incentive to weaken schools. Before becoming HISD superintendent, he was the CEO of the Third Future Schools (TFS) charter school network (Sessions, 2023a), and, as recently as February of 2026, TFS was paying him for consulting services (Lee, 2026a). TFS is now the predominant "turnaround" model approved by the Texas Education Agency to take over schools that have repeatedly received failing grades from the state (Lee, 2026b). When HISD schools fail, TFS could be chosen to take them over and charge the district consulting fees. If Miles weakens schools and they have to be taken over when he leaves, he can return to TFS and benefit financially from the failing schools he created.

If Miles bankrupts HISD, many of his supporters benefit. Failing or underenrolled schools can be closed and properties sold to raise revenue. This process is already well underway as the Board of Managers have released lists of properties for sale (Partain, 2025a). Through Miles' destruction, real estate developers can gain access to valuable properties in gentrifying neighborhoods, such as Wheatley High School's, which sits only a mile from the ever growing East River development. Miles has zero oversight from the rubber-stamping Board of Managers with unfettered access to HISD's coffers and a financial incentive to fail. Why would he *not* run HISD into the ground?

Fighting Back

Deliberate destruction of public school districts is nothing new. Like his fellow Broadies, Miles is just a small part of a larger orchestrated campaign to dismantle public education (Strauss, 2021). This systematic leveling of schools has been successful in many cities, but the city of Houston may be uniquely positioned to fight back and win.

When I left my Broad showcase school in 2014, I immediately discovered and joined a pro-public education group called Community Voices for Public Education (CVPE). CVPE was founded in 2010 by educators and parents who were negatively affected by HISD's Broad-style Apollo 20

initiative (Turner, 2014). CVPE gave me a framework to understand what had happened to me at my school and what was happening with public education in the country as a whole.

CVPE is not the only civic group in Houston that supports public education. Perhaps because of the racial and economic diversity of HISD as a whole, there has always been a healthy presence of citizens showing up to speak at HISD board meetings, at least as long as I have been attending. Houston is a city that feels strongly about its public schools, and a state takeover did not sit right with many Houstonians. In many districts across the country, residents have stayed quietly hopeful at the beginning of a takeover, but the very opposite was true in Houston. Before the 2023-2024 school year began, Miles and the Board of Managers were greeted by long lines of critical questioners at many of their "community meetings." At the first official Board of Managers meeting, the shouts and jeers from the audience were so loud that the board could barely conduct business (Downing, 2023a).

Since then, the opposition has only grown stronger, culminating in Miles' landslide 2024 school bond election defeat (Lehrer-Small, 2024). In the spirit of Broad's venture philanthropy, powerful business alliances, expecting to benefit financially from Miles' $4.4B HISD infrastructure bond, raised around a million dollars to ensure its passage (Menchaca, 2024). In response, CVPE and its allies went into overdrive, knocking doors, creating yard signs, posting on social media, hosting house parties, speaking to the media, making calls, and greeting people at the polls. HISD board meetings were packed with people speaking against the bond. In the end, even in a Democratic city, the bond failed impressively, 58% to 42% (Lehrer-Small, 2024).

Defeating the bond was a huge victory for anti-Miles and anti-Broad activists, but it has not yet spelled the end of the takeover, leaving many groups wondering what to do next. For our next steps, we must look to the successful deep organizing that has been taking place in the labor movement (McAlevey, 2016). Each HISD campus has a built-in structure made up of employees, students, and families. If we want to build enough power to defeat Mike Miles and any Broadie that might follow in his wake, we must start at the campus level, providing training to individual educators, students, and family members on the basics of organizing and then bringing them together with the other groups. For example, basic union and community organizing training is available for free online through the Organizing for Power program (2026). A community coalition of organized educators, students, and families is hard to beat.

Many of the most impactful anti-takeover actions in HISD have happened at the local campus level. The most notable recent example comes from Durham Elementary. At the start of the 2025-2026 school year, Durham educators, concerned about sudden changes to the curriculum, communicated their concerns to Durham parents. In response, dozens of Durham parents wrote letters to district leadership and then showed up to the August board meeting where fourteen of them delivered "waterfall" speeches, speaking one after the other on the same topic, ending with the same tagline: "We're not opposed to necessary changes, but we are opposed to poorly planned disruption without proper support and resources" (Mizan, 2025c).

The notable part about Durham was how they handled what came next. After the board meeting, Miles visited Durham and fired several educators, as he often seems to do when a campus creates negative press for him. Instead of staying quiet, one of the fired teachers went immediately to the press and spoke about what had happened to her (Mizan, 2025b). The following month, the

Durham parents were back at the board meeting again, waterfall speeches in hand, defending this teacher and her fired colleagues.

How was Durham able to withstand Miles' terror campaign when it has quieted so many other campuses? The communication and solidarity between educators and parents allowed for a shared sense of courage that might not have existed had they not been in contact with each other. Durham educators knew they would have parents' support no matter what happened, and likewise parents knew they had educators' full blessings to speak up.

If we want to defeat Broad, we must systematically train educators, students, and families to intentionally build the solidarity that Durham parents and educators did. We must build these coalitions campus by campus, neighborhood by neighborhood, feeder pattern by feeder pattern, precinct by precinct. The Broad universe has never met an opponent as well-informed, well-organized, and well-resourced as the city of Houston. We can save our schools, but we need all hands on deck: coalitions of parents, students, educators, business leaders, politicians, and voters–on both sides of the aisle because both sides care about children. Together we can take back our schools and make them better.

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"The Politics of Caring" on Trial: State Takeovers as the New Face of Subtractive Schooling

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"The Politics of Caring" on Trial: State Takeovers as the New Face of Subtractive Schooling

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Abstract

School takeovers often ignore the "politics of care," viewing them through a simple problem-solution lens that leaves students feeling uncared for, fostering forced learning. Dr. Angela Valenzuela's Subtractive Schooling (1999) offers a critical framework, especially relevant to the Houston ISD takeover, asking if "success" means mere results or deeper human connection. The historical context of Dr. Valenzuela's work (1999), which discusses how assimilationist policies devalue students' cultural and linguistic backgrounds, mirrors the modern phenomenon of state-led school takeovers, which often remove local control and disempower Black and Brown communities. School takeovers often prioritize metrics over care, fostering distrust and forced learning, as seen with HISD and Valenzuela's (1999) Subtractive Schooling. This editorial challenges the authoritarian mindset, exploring whether caring approaches can build trust and creativity, or if takeovers create dystopian conformity, demanding we weigh outcomes against intrinsic student growth.

Keywords: politics of care, HISD takeover, intrinsic learning, Subtractive Schooling

Introduction

"Education either functions as an instrument to facilitate conformity or it becomes the practice of freedom"

-Paulo Freire, Brazilian educator and philosopher

In late 2019, the Texas Education Agency (TEA) initiated proceedings to take over the Houston Independent School District (HISD) and replace its elected school board, citing sustained poor academic performance at Wheatley High School and allegations of board misconduct (Yoder, 2023). The district responded with legal action, arguing that a temporary suspension of Wheatley's accountability rating due to Hurricane Harvey interrupted the state's required five-consecutive-year intervention threshold (Yoder, 2023). While lower courts initially ruled in favor of HISD, the Texas Supreme Court sided with the state in January 2023, based on a 2021 law that clarified the state accountability calculation methodology (Yoder, 2023). Despite the ongoing legal conflict, Wheatley High School demonstrated significant academic improvement, increasing its accountability rating from an 'F' (59) in 2019 to a 'C' (78) by the 2021-2022 school year (Yoder, 2023). Principal Sabrina Cuby-King attributed this turnaround to targeted strategies, including:

- Teacher professional development programs
- Implementation of accountability measures for instructional time
- Student-mentor pairing initiatives aimed at boosting attendance

Though Cuby-King was proud of her work and those of students and teachers, the improvement at Wheatley did not dissuade commissioner of the Texas Education Agency Mike Morath from replacing Houston ISD's school district superintendent Millard House along with the Houston ISD education board. This abrupt change and what it will entail in the future of Houston ISD students is telling. It echoes a message shared over 30 years ago by UT Austin's Dr. Angela Valenzuela (1999),

revolving the politics of caring and the influence that subtractive schooling has on students, where deficit-based thinking and demeaning interactions erode students' cultural identities and self-worth, highlighting an urgent need for the empathetic, student-centered approach often discussed within the politics of caring framework. This framework emphasizes the importance of educators showing genuine care and respect for students' cultural backgrounds as a means to counteract subtractive schooling and promote positive academic and social outcomes.

In a foundational three-year study initiated in the 90s, Dr. Angela Valenzuela (1999) applied a modified ethnographic approach at Juan Seguín High School in Houston. She became part of the students' world—amidst cholos/as and chicanos/as during lunch hours, and before and after school—to examine educational disparities rooted in subtractive assimilation, social capital, and the politics of caring. The culmination of this research, presented in her book *Subtractive Schooling* (1999), revealed a common thread: students consistently felt school boards and officials were indifferent to their education. The historical context of Dr. Valenzuela's work—which details how assimilationist policies devalue students' cultural and linguistic backgrounds—provides a vital lens through which to view the modern phenomenon of state-led school takeovers. These takeovers remove local control and disempower Black and Brown communities, prioritizing standardized metrics and results over genuine human connection and care. This approach fosters distrust and forced learning, evident in the current HISD events. This editorial explores the prevailing "change at all costs" mindset. We must ask: does "success" mean standardized results, or deeper human connection? It explores whether approaches rooted in care can build trust and creativity, or if top-down takeovers inevitably lead to dystopian conformity. Ultimately, we must demand a critical balance, weighing forced academic outcomes against intrinsic student growth.

Fast forward thirty years, and we are compelled to ask: how much has truly changed? This question offers a critical framework, especially relevant to the recent Houston Independent School District (HISD) takeover. Three decades after landmark educational equity cases, the Houston Independent School District (HISD), Texas's largest district, recently faced state intervention. The Texas Supreme Court upheld the Texas Education Agency's (TEA) takeover in 2023, citing persistent low performance under state law (Edison, 2025; Walsh 2023). This state-led intervention, legally grounded in statutes allowing TEA control over chronically low-performing districts (Cheng, 2023), sparked significant community backlash, highlighting tensions between state mandates and local control.

Under this new governance, struggling campuses implemented the controversial New Education System (NES), a pedagogically rigid, test-driven model criticized as 'subtractive schooling' (Chidi, 2024). The NES approach features high-stakes exit quizzes, directing 'successful' students to remedial sessions in libraries while isolating 'struggling' learners for further intervention, a system some view as militaristic and oppressive. This current situation echoes broader themes, particularly the 'politics of caring' discussed by Dr. Valenzuela in Subtractive Schooling (1999). The fundamental tension lies between transactional control (fear-based compliance for immediate results, like a coerced clean room) and transformative pedagogy (care-based engagement fostering intrinsic motivation and long-term learning). While both approaches achieve short-term compliance (a clean room), the difference in fostering student agency and deep learning is profound, mirroring the debate between inquiry-driven versus compliance-focused educational models like NES.

In light of the recent HISD school takeover and the broader politics of caring, the findings from the field notes underscore how top-down administrative shifts can exacerbate the lack of authentic

teacher-student relationships, focusing on compliance over connection. Valenzuela (1999) introduces the powerful framework of subtractive schooling, a framework showing how schools diminish students' cultural capital and sense of belonging, particularly for Black and Brown youth who often feel nobody cares. She presents the question—what if each weekday, for eight hours a day, teenagers inhabited a world populated by adults who did not care—or at least care for them sufficiently? (Valenzuela, 1999). When reviewing Dr. Valenzuela's field notes from open-ended interviews, a common thread was the palpable lack of relational care that students felt was given to them.

In the current context of the HISD school takeover, these observations about the politics of caring remain highly relevant, highlighting how systemic issues often manifest as a breakdown in fundamental human connection within the classroom. The state's approach embodies the very assimilationist policies Dr. Valenzuela critiques. By imposing a standardized curriculum and a rigid instructional model, the state minimizes the cultural and linguistic resources of Latino and Mexican American students—effectively "de-Mexicanizing" them. This process constitutes subtractive schooling, a practice that divests predominantly low-income Black and Hispanic youth of their social and cultural capital. Consequently, students are made vulnerable to academic failure rather than empowered for success. Furthermore, the takeover framework consistently overlooks the politics of caring, which Valenzuela identifies as central to effective education for minoritized students. The state's emphasis on formal rules, performance metrics, and standardized outcomes, at the expense of authentic, relationship-based connections that honor students' lived realities, creates only an aesthetic or superficial form of caring. As documented in post-takeover data, this approach often leads to high teacher turnover and campus instability, hindering the development of supportive learning environments essential for academic achievement (Chidi, 2024).

From an academic perspective, the Houston Independent School District (HISD) takeover is framed by state officials as a necessary intervention responding to alleged teacher failings and poor academic performance in specific schools. This narrative argues that a lack of instructional quality necessitated the removal of local control and the implementation of top-down reforms. However, a critical analysis of the takeover, utilizing Dr. Valenzuela's (1999) work on Subtractive Schooling and the politics of caring, suggests a different interpretation, challenging the premise that teacher performance is the root cause of the district's historical challenges. This counter-narrative, often voiced by community members and scholars like Dr. Valenzuela, posits that top-down state control often exacerbates, rather than solves, long-standing inequities. The argument that the Houston Independent School District (HISD) intervention is a product of teacher failure constitutes a racialized and depoliticized narrative. Critics contend that the state intervention may serve as a political maneuver designed to undermine the democratic engagement of marginalized communities and deflect attention from underlying systemic issues, such as chronic underfunding.

Research indicates that state-mandated takeovers lack consistent evidence of generating academic benefits and often result in operational disruptions and increased reliance on punitive disciplinary measures (Ayscue, et al., 2022; Schueler, 2023; Turley, 2023; Yoder, 2023;). In fact, findings show that school districts that were taken over were often targeted in mainly minority communities. Schools post-takeover also showed no positive learning impacts, despite TEA's claims that school takeovers boost test scores (Schueler, 2023), implying that test scores are the true parameter of intelligence. These findings suggest that substantial financial investment and the adoption of culturally responsive educational approaches represent more effective strategies for improving student outcomes than top-down administrative interventions.

To delve deeper into the implications of these findings, I spoke with Dr. Angela Valenzuela, author of Subtractive Schooling, a leading scholar and researcher at the University of Texas.

Below are her insights on the topic:

What observations or experiences led you to develop and explore the framework of subtractive schooling?

The framework really emerged from a deep sense of dissonance I felt between what schools said they were doing for Mexican-origin youth and what I actually saw happening every day. I grew up straddling two worlds—Spanish and English, Mexican and U.S. American—and I learned early on that schools often treated our language and culture as problems to be fixed rather than as assets to be nurtured. When I started my doctoral work and later my ethnographic study, I kept seeing the same pattern: students arrived at school with rich cultural, linguistic, and familial resources, and somehow they left with less—less confidence, less connection to their heritage, less belief that they belonged in academic spaces. I realized this wasn't just "underachievement." It was a systematic process. Schools were subtracting key elements of students' identities, their social capital, and their sense of possibility. That's what led me to name it "subtractive schooling."

Your work highlights the importance of "the politics of caring" and trusting teacher-student relationships. Do you think today's teachers have the necessary support and resources to build these relationships, especially in schools with high teacher turnover?

To be candid, many do not. We ask teachers to be social workers, healers, curriculum experts, test-prep specialists, and cultural brokers—all while being underpaid, over-surveilled, and subject to political attacks. In high-turnover schools, the conditions that make relational work possible—time, stability, trust, and institutional support—are often precisely what is missing.

And yet, I meet teachers all the time who still manage to enact a politics of caring: they show up at community events, learn students' home languages, connect with families, and create classroom cultures of mutual respect. They do this often in spite of the system, not because of it.

So my answer is: the capacity is there; the desire is there. What's lacking is an educational and policy environment that understands caring not as an individual "extra" but as central to learning and worthy of protection and investment.

Is a "politics of caring" enough to challenge and overcome the deep-seated, systemic biases in the education system? How can an individual teacher's caring approach translate into large-scale, institutional change?

A politics of caring is necessary but not sufficient. Caring, as I define it, is not simply about kindness; it is about standing with students and communities in their struggles for justice. It requires challenging harmful policies, resisting deficit narratives, and refusing to participate in practices that undermine students' dignity and opportunities. Teachers can enact this kind of politically aware authentic caring by organizing collectively through networks, unions, and community coalitions that advocate for more just policies. They can also bring it into their curriculum by centering histories, literatures, and knowledges that affirm students' identities and contest dominant narratives. And they can use their public voice—writing op-eds, speaking at school board meetings, and testifying about the real impacts of policy on students' lives. Ultimately, systemic change requires collective power. A politics of caring becomes transformative when it moves beyond the interpersonal and into the institutional—when caring teachers recognize themselves not only as classroom

practitioners but as policy actors capable of shaping the broader educational landscape at multiple levels of the education system—at the local school board, state, or federal level.

Valenzuela, alongside a growing body of research (Ayscue et al., 2022; Chidi, 2024; Schueler, 2023; Turley; 2023; Yoder, 2023;) stress, foundational shifts in education take place not by enforced school takeovers, but by establishing environments built on care, trust and engaging–not merely positing–-into students minds. As the research has shown, school takeovers bent on magnifying test scores fail to capture a genuine love of learning (Chidi, 2024). Similarly, a classroom environment that prioritizes academic rigor at the expense of genuine care is unlikely to foster critical engagement (Schueler, 2023; Turley, 2023). Furthermore, a school takeover that actively disregards the voices and concerns of parents and teachers can never lead to a truly thriving educational institution (Ayscue et al., 2022); instead, as Paulo Freire observed, it merely becomes an instrument to facilitate conformity.

In an era where schools are vulnerable to closures or takeovers based on performance metrics and limited resources, school districts must prioritize adding, *not subtracting*, adequate care and resources to their classrooms. This approach is essential for cultivating genuinely thriving schools and encouraging engaged, critical minds.

David J. Terrazas is an interdisciplinary doctoral researcher at The University of Texas at Austin whose scholarship examines the intersections of sport, media, culture, and society. Drawing on graduate training in sport and society, a Master of Science in Sport, Recreation, and Tourism, and a Master of Business Administration with an emphasis in Sport Management, as well as professional experience in NCAA Division I athletics and sport for development communitybased educational initiatives, their work explores how institutions, media narratives, and cultural systems shape identity, belonging, and community experiences. Their research interests center on the socio-cultural dimensions of sport, including sport sociology, media representation, globalization, national identity, and the ways institutions influence participation, meaningmaking, and social engagement across diverse contexts. Through interdisciplinary inquiry, their scholarship engages with questions of power, equity, and institutional decision-making, with particular attention to how social systems shape the experiences of diverse communities.

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