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Managing the Brand: Racial Politics, Strategic Messaging, and Coalition-Building Efforts of
Charter Management Organizations

By

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A dissertation submitted in partial satisfaction of the
requirements for the degree of

Doctor of Philosophy

in

Education

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Committee in charge:

Professor Tina Trujillo, Chair

Professor Janelle Scott

Professor Ian Haney López

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Abstract

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Laura E. Hernández

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Alleviating racial inequity has remained a central yet elusive goal in education reform. As racial inequities have persisted, policymakers have instituted a variety of policies to address educational disparities. Most recently, reformers have advocated to scale up the number of high quality charter schools to improve educational opportunities for communities of color. While many endorse charters as a means to address inequities, politics, or the manner in which power is asserted in the charter context, may complicate the degree to which charters advance equity. As charters engage in strategic behaviors to secure resources, they persuade and interact with various stakeholders to build supportive coalitions. These behaviors occur within contexts characterized by unique political, economic, and racial dynamics that can affect how power and influence work at the local level. These strategic engagement behaviors and their intersection with racial and political contexts are less understood within the research base on charter schools.

This study focuses centrally on these coalition-building efforts. In this embedded case study, I employ an interdisciplinary framework synthesizing concepts from political science and sociology to explore the political and racial dimensions of efforts implemented by charter management organizations (CMOs)—nonprofits with the mission of replicating ‘what works’ across a network of schools. I analyze the engagement strategies of a population of 10 CMOs operating in one urban district in California alongside an in-depth analysis of three nested organizations who vary distinctively in their organizational status. I draw upon interview, observational, and documentary data to examine how national and local politics interact with CMO efforts, how CMOs engage and address the interests of various stakeholders, and how CMOs invoke race throughout the process. Through these questions, I investigate how race, competition, and legitimacy affect coalition-building strategies and CMO relationships with key stakeholders and racial groups.

My analysis reveals that racial politics complicate the degree to which the CMO population at the center of my study advances racial equity. The CMO leaders in the study engaged in both explicit and implicit race-based political efforts to sustain their organizations and manage

stakeholder perceptions, yet, in doing so, faced new challenges in maintaining their equity orientations. Issues related to competition and the engagement of diverse stakeholders contributed to the challenges and opportunities that CMOs faced. On one hand, CMOs engaged in race-conscious strategies and messaging to counteract anticipated critiques of the sector's systematic exclusion of the city's Black community. They also used implicit racial appeals to politically and symbolically align their organizations with the advancement of racial equity for certain audiences. For others groups, especially stakeholders who maintained financial, political, or racial power, CMOs circulated deficit-laden messaging that reified negative understandings of racial groups to create a justification for their institutional presence or to secure increased funding. Overall, CMOs strategically used race and racial frames to garner support and to secure critical resources in the competitive charter landscape. To sell their brand to multiple audiences, CMOs crafted and conveyed subtle racial narratives that aligned with what they perceived as the racialized values and norms maintained by stakeholder groups.

Advancing these competing and incompatible frames has implications for CMOs' equity commitments. On one hand, the circulation of deficit-laden characterizations of nondominant groups in any context reifies negative understandings of racial groups, which affects how the U.S. deals with race collectively. In addition, CMOs selectively deployed this discourse to sustain their organizations in a competitive landscape, revealing how competition can drive equity-oriented leaders to employ racialized tactics that undermine their intentions and further reify educational and racial inequity in the pursuit of organizational interest.

This research has theoretical, methodological, and practical implications. Few studies employing political frameworks incorporate an explicit theory of race in political analyses and thus fail to capture the multifaceted manner in which race operates in reform. By synthesizing tenets from political science and sociology, I examine race as an evolving and dynamic concept that can be investigated through both traditional political concepts like coalition governance and lesser-employed sociological concepts related to racial representation and discourse. Methodologically, my examination of messaging through the use of Critical Discourse Analysis also provides a unique contribution as discourse has been underexamined in political processes and sheds lights on how the often-subtle invocation of race-based frames may undermine engagement efforts and the advancement of educational and racial equity. Finally, this research has practical contributions for educational leaders and policymakers. This dissertation advances policy knowledge to inform broader understandings of CMOs and suggests new areas for reflection and culturally responsive practices that leaders can enact to enable strong partnerships with marginalized communities.

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Chapter 1: Introduction

In the past few years, there has been resurging public attention to the continued role that race plays in U.S. society. Headlines of racialized violence and its surrounding protests persist daily, forcing the nation to grapple with alarming instances of police brutality and the harm inflicted upon Black and Brown bodies. These accounts are compounded by growing attention to the debilitating effects of income inequality, which are felt acutely along racial lines and have ramifications for the well-being of racial groups and U.S. democracy (Nasir, Scott, Trujillo, & Hernandez, 2016; Wilkinson & Pickett, 2009). The use of racially coded appeals in the recent presidential election has also brought race to the fore. This racial rhetoric caused many U.S. citizens to acknowledge the persistence of racism and its continuing sociopolitical consequences.

Paradoxically, attention to race is occurring within a broader context that suggests that race plays a less salient role in U.S. society. Because of the perceived racial progress secured by the Civil Rights Movement that was exemplified by the election of President Barack Obama, many argue that the best way to move beyond racism is to minimize references or attention to it in our policies (Haney López, 1996; Powell, 2008). Despite these beliefs and the successful efforts to codify them in policies, recent events and scholarly research point to the entrenchment of racist ideas in our institutions (Carter, Skiba, Arredondo, & Pollock, 2017; Leonardo & Grubb, 2013; Losen, 2003; Vaught, 2011). Racial biases continue to operate and often negatively affect the experiences of individuals of color.

The tensions arising from the disjuncture between a colorblind context and evidence of race's continued salience are reflected in U.S. schools. Since the landmark case of *Brown vs. Board of Education*, education reformers and policymakers have routinely proposed policies seeking to address racial inequities. These efforts have included race-conscious integration (Orfield & Eaton, 1997) and school finance reforms that channel increased resources to schools with large concentrations of students of color (Rebell, 2009). High-stakes accountability policies have also intended to advance equity by exposing racial achievement gaps that would in turn, motivate schools and educators to improve their practice for marginalized groups (Mintrop & Trujillo, 2005). Despite reformers' attention to race in education policy, these reforms have generated little systemic change in alleviating racial disparities (Carnoy & Loeb, 2002; Carter, 2010; Orfield, Kucsera, & Siegel-Hawley, 2012; Superfine, 2013).

One explanation for this ineffectiveness can be found in judicial and legislative restraints on the degree to which race can be taken into account in policy (Bell, 2005; Dumas, 2011; Orfield & Eaton, 1997; Wells & Frankenberg, 2007). Another impediment may lie in reformers' misunderstanding of how policies can best acknowledge and address systemic, racial disenfranchisement. As reformers invoke refrains of "no excuses" and "demography does not define destiny," they obscure the impact of structural racism and elevate individualistic approaches to alleviating inequity. In this context, the tensions become apparent. While policies lay claim to addressing racial inequities, reformers are constrained or misinformed as to the ways race continues to structure students' experiences. The result is the persistence of inequities and the negligence of how race and racial biases affect access to high-quality learning environments and interactions with students of color (Carter et al., 2017).

In recent years, charter schools have become a popular policy mechanism by which reformers aim to address inequities. Charter schools are publicly funded but privately operated entities who are granted autonomy in curriculum, hiring, and governance in return for greater

accountability to an overseeing body (Lubienski & Weitzel, 2010). Policymakers and reformers have increasingly advocated to “scale up” the charter school sector to improve educational opportunities for marginalized racial groups. From their inception, reformers conceptualized charter schools as equitable alternatives to traditional public schools. Advocates believed that as less regulated institutions, charters could enable teachers to develop and enact innovative approaches to meet the needs of students whom the system underserved (Budde, 1988; Shanker, 1988). As the charter landscape has grown and diversified to include networked and often more market-oriented operators, advocates from a broad cross-section of the populace, including the business community, civil rights organizations, and parent groups, continue to emphasize the promise of these institutional spaces. Often invoking the spirit of *Brown* (Scott & Quinn, 2014), they assert that charters facilitate equity by enabling innovative practices, student and parental responsiveness, and competition in local school markets (Chubb & Moe, 1990). Because charters have the flexibility and incentive to respond to local needs, many proponents believe that their proliferation can improve learning conditions and outcomes for nondominant communities.

Despite this theory of action, research demonstrates how communities of color have experienced this reform in ways that contradict advocates’ claims. For example, researchers have shed doubt on the much lauded academic achievement of charter school students, interrogating how racialized patterns of enrollment and attrition impact performance levels (Carnoy, Jacobsen, Mishel, & Rothstein, 2005; Lacireno-Paquet, Holyoke, Moser, & Henig, 2002; Miron, Urschel, & Saxton, 2011). Research also suggests that charters have been a significant mechanism in the resegregation of U.S. schools (Frankenberg, Siegel-Hawley, & Wang, 2010; Orfield et al., 2012), often enrolling disproportionate numbers of Black and Latino students (Furgeson et al., 2012) or serving as instruments of white flight (Renzulli & Evans, 2005). Thus, while many reformers may invoke *Brown* to justify their calls for charter schools, the evidence suggests that charters may, in some ways, perpetuate inequitable learning environments.

Politics, or the manner in which power relations are enacted and asserted (Hochschild, 2005; Malen & Cochran, 2014) in the charter context, also negatively affect the degree to which charters can advance equity. Researchers have revealed patterns in charter politics, which suggest that particular groups or priorities may exert greater influence. For instance, scholars have traced the policy and fiscal networks supporting charter schools, suggesting that vulnerable economic and legislative environments may facilitate the disproportionate influence of these networks over local communities (Buras, 2011; Scott, 2009). Others have examined the democratic processes surrounding charter governance, noting closed decision-making practices that impede authentic engagement with communities of color (Lipman, 2011). These practices reveal how political dynamics may be another mechanism by which charter advocates’ claims of racial justice and equity are undermined.

As researchers investigate charter politics, they provide critical assessments of the actors and networks characterizing the landscape and suggest how power, influence, and decision-making behaviors may negatively affect communities of color. Yet, less is known about the relational or local interactions between charter schools and the stakeholders they engage in managing their organizations. To sustain their organizations, charter personnel engage in strategic behaviors to secure resources and to create coalitions that support their institutional presence. These behaviors necessarily occur within sociopolitical contexts characterized by racial and political dynamics that can affect how power and influence work at the local level. This study is centrally focused on these coalition-building efforts. In this study, I employ an interdisciplinary framework that synthesizes concepts from political science and sociology to

explore the racial and political dynamics surrounding the efforts of charter management organizations (CMOs) in one urban area. I ask how national and local politics interact with CMO efforts, how CMOs engage and address the interests of various stakeholders, and how CMOs invoke race throughout the process. In asking these questions, I examine how competition and legitimacy can affect coalition-building strategies and CMO relationships with key stakeholders and racial groups.

Charter Management Organizations: An Overview

CMOs are an ideal organizational unit for the exploration of the politics of coalition building and its intersection with race. In the following sections, I provide a definition of CMOs, a brief overview of their emergence, and a description of the racialized patterns surrounding their growth.

What are CMOs?

CMOs aim to replicate ‘what works’ across a network of charter schools under the organization’s common philosophy, branding, and core values (Farrell, Wohlstetter, & Smith, 2012). CMOs’ defining characteristics include: a) nonprofit status, b) the management of multiple charter schools, c) a distinct mission or instructional approach, and d) a central office or management team that offers ongoing support for its schools (ibid). While maintaining these common features, the CMO sector varies in terms of size (i.e., number of schools operated, size of central office), geographic presence, and instructional programming (Miron & Gulosino, 2013). CMOs also differ in their approaches to charter school replication. Some engage in aggressive, premeditated replication while others grow their networks in response to stakeholder demands or in an effort to capitalize on financial or facilities-related opportunities (Farrell, Nayfack, Smith, & Wohlstetter, 2013).

Despite this variation, these organizations are founded upon the same theory of action, which suggests that a networked approach generates greater capacity for change within and among schools (Hadfield & Chapman, 2009). A CMO provides key supports in areas where independent charter schools have previously struggled, including governance and financial management (Farrell et al., 2012). Their central offices also help facilitate replication at an expeditious pace, serving to increase competition and charter schools’ share of local educational markets (Farrell et al., 2012). Because of their unique organizational capacity, many policymakers and reformers have promoted and invested in CMOs to scale up the number of high quality charter schools. CMOs now constitute about 20 percent of the charter landscape, growing their institutional presence by approximately 12 percent annually (Miron & Gulosino, 2013) and often holding the market share of charters in many urban areas (Jabbar, 2015a).

In growing and sustaining their organizations, CMO staff engage in strategic behaviors to secure support from a variety of stakeholders. They engage city and district officials to secure charter authorization and facilities. They actively pursue financial support from donors or philanthropic organizations to operate their network. CMOs also recruit families and students to obtain full enrollment. These strategic political interactions are complicated by a key challenge facing CMOs: the tension between standardization and autonomy. As CMOs expand, they aim to replicate their school models while enabling the community responsiveness and innovation that charter environments are meant to embody (Lake, Dusseault, Bowen, Demeritt, & Hill, 2010). Despite these aims, external pressures from policymakers and financial supporters to rapidly expand make achieving this balance a challenge (Scott, 2009).

The Rise of CMOs: A Brief History

During the earliest years of the charter school movement in the 1990s, several types of charters characterized the landscape. Many were experimental school alternatives or “mom-and-pop” charters created by educational leaders and community-based organizations who had roots in the alternative schools of the 1960s and 1970s (Fabricant & Fine, 2012; Wells, Lopez, Scott, & Holme, 1999). At the same time, many charters were “entrepreneur-initiated” (Wells, Lopez, et al., 1999). These included schools operated by for-profit management firms or those led by individuals from outside of the education field who maintained a strong market philosophy. The range of charters in the 1990s reflected how these schools could “give people of various political, social, cultural, and philosophical persuasions who are discontented with the educational system an alternative to regular public schools” (Wells, Lopez, et al., p. 174). In essence, charter schools could conceivably create spaces for culturally and community responsive schooling while allowing those who sought to restructure the education system with market logics to do so.

While the diversity and often “homegrown” character of charter schools still remained, entrepreneur-led charters gained momentum in the mid-1990s, laying the roots for CMOs. Early on, for-profit or educational management companies (EMOs) were the primary actors engaged in corporate-backed charter management. EMOs opened, operated, and delivered a variety of services to charter or district schools depending on state provisions. Over time, poor fiscal and academic performance and increased skepticism of for-profit charter companies led policymakers and charter advocates to promote CMOs as an alternative (Scott & DiMartino, 2010; Wohlstetter et al., 2013). Still driven by market ideology and focused on achieving “competitive scale,” these nonprofits embraced the transfer of private-sector practices to public schooling (Scott & DiMartino, 2010) but “without the demands of generating profit for shareholders” (Farrell et al., 2012, p. 504). Bolstered by the expansion of charter-friendly state legislation, media attention, and heavy investment from the philanthropic community (Rich, 2014; Scott, 2009; Scott & DiMartino, 2010; Wohlstetter et al., 2013), CMOs began to proliferate. Charter-friendly shifts were also evident at the federal level as policies and funding sources were introduced that incentivized charter conversions or eased political and financial constraints that inhibited CMO growth (Scott, 2011; Wohlstetter et al., 2013).¹

At a foundational level, one can understand CMO growth as a product of neoliberalism, the driving ideology behind economic, political, and social policies since the 1970s. Neoliberalism represents “an ensemble of economic and social policies, forms of governance, and discourses and ideologies that promote individual self-interest, unrestricted flows of capital, deep reductions in the cost of labor, and sharp retrenchment of the public sphere” (Lipman, 2011, p. 6). The retrenchment of the public sphere centers on the dismantling of welfarist policies, or government provisions established to provide citizens with a minimum standard of well-being (Peterson, 1985). In the education sector, neoliberalism has resulted in the institutionalization of policies that promote accountability and privatization, minimize educational costs, and increase school choice (Ross, 2006; Scott, 2011). This ideology is at odds with democratic political theories as market-oriented reformers advocate for the transfer of school governance to unelected

¹ The 2001 No Child Left Behind Act was one such policy. Most relevant to the growth of charters and CMOs were the law’s stipulations that students in schools failing to meet annual yearly progress (AYP) could opt into a school of choice or the school itself could be restructured by a charter operator (Lubienski & Weitzel, 2010). The Obama administration continued this charter-friendly approach. His administration introduced the Race to the Top initiative, Investing in Innovation (i3) awards, and Grants for Replication and Expansion of High Quality Charter Schools, which provided over \$300 million dollars to CMOs during Obama’s tenure (U.S. Department of Education, 2015).

managers (Engel, 2000) and frequently suggest that local politics and public structures contribute to school failure (Scott & DiMartino, 2010). It is within this context that CMOs have emerged as a popular mechanism to advance the charter sector. Even though CMOs are diverse, they are situated within the neoliberal project for various reasons. First, the market logics of privatization, efficiency, and scalability undergird CMOs' theories of action. Furthermore, their privatized decision-making structures impede the ability for local stakeholders to engage in democratic governance. Finally, their history suggests that CMOs directly descend from market-oriented reforms and engage in similar processes without the stigma of a profit-rearing status. This history and guiding logic has implications for the manner in which CMOs manage their organizations and engage in coalition-building practices.

CMOs and their Undergirding Racial Dynamics

The racial dynamics that undergird CMO expansion also make them important organizations to investigate. In their proliferation, racialized dimensions of CMO expansion and leadership have emerged. For instance, CMOs are disproportionately represented in urban areas and serve a greater number of Black and Latino students when compared to their host districts (Furgeson et al., 2012). Their concentration in these communities is often facilitated by mission statements, which typically include references to low-income or underserved communities. While these references are often deracialized (Hernández, 2016), these organizational visions necessarily mean that CMOs engage marginalized racial groups as they grow or sustain their organizations. Researchers have also noted the demographic differences between CMO leaders and the communities they serve, revealing the predominance of wealthy, white leadership among network leaders and its implications for authentic engagement with communities of color (Scott, 2008).

Complicating these racial dynamics is how market reformers embrace *colorblindness*. As a racial framework, colorblindness suggests that the best way to move beyond race is to stop acknowledging it (Bonilla-Silva, 2003; Brayboy, Castagno, & Maughan, 2007). It is based on the assumption that race is no longer a salient factor in the life of an individual or societal structures. Instead, those adhering to this perspective assume that racial groups are extended equal opportunity and any inability to achieve is rooted in the individual's merit. As neoliberals espouse commitments to choice and competition, they reflect these central features of colorblindness by assuming an ahistorical perspective that neglects structural racism (Giroux, 2010; Roberts & Mahtani, 2010) and asserting that opportunity for racial groups can be achieved through individualistic mechanisms. Furthermore, neoliberal reformers subtly construct racial groups as deficient by pathologizing marginalized racial groups to serve private interests (Hutchison, 2011; Lipman, 2011) or by valorizing "beating the odds" or "grit" narratives (Saltman, 2015; Stern, 2015). Overall, neoliberal adherence to colorblindness, including those engaged in CMO efforts, suggests that the racial dynamics surrounding CMOs may go beyond patterns of enrollment and leadership. Market-oriented reformers may also engage in this work through an ideological framework that obscures how race continues to structure everyday life.

Summary

CMOs are organizations that necessarily engage in strategic relational practices to maintain their institutional presence. The inherent political behaviors in which CMOs engage, coupled with the emerging racial dynamics surrounding their proliferation, make them compelling organizational units for the exploration of racial politics in the education sector.

CMO Racial Politics: What We Know

Studies of the politics of education elucidate how power, values, and interactions shape policy creation, implementation, and outcomes (Stout, Tallerico, & Scribner, 1994). Those studying charter school politics examine similar concepts. They investigate the role of government agencies in charter school reform (Mintrom & Vergari, 1997) and the actors and networks advancing or opposing charter expansion (Baker & Ferris, 2011; Kirst, 2007; Vergari, 2007). Scholars also describe the political origins of the movement (Lubienski, 2010; Wells, Lopez, et al., 1999) and analyze the policy frames that have enabled the charter movement's broad base of support (Bulkley, 2005; Wells, Grutzik et al., 1999). Through this diverse scholarship, researchers teach us much about how power, influence, and conflict operate in charter school reform. However, there is a dearth of scholarship on the politics surrounding CMOs specifically. Most research indirectly analyzes CMOs by including them in broader discussions of charter schools, making it difficult to distinguish if CMOs have unique behaviors. The few studies that explore CMO politics describe the ideological and fiscal networks supporting their proliferation (Buras, 2011; Farrell et al., 2012; Scott, 2008; Wohlstetter, Smith, Farrell, Hentschke, & Hirman, 2011). Overall, this research base advances broad assessments of CMO networks and growth, leaving local, relational dynamics underexplored.

How race intersects with issues of power and governance remains an undertheorized dimension within the politics of education. Researchers have argued that the politics of education has assumed a colorblind approach, tending to avoid discussions of race and racism (López, 2003; Scheurich & Young, 1997). They contend that this omission fails to account for the impediments marginalized racial groups face in exerting influence in policy networks. Despite this critique of the field, some researchers have explicitly attended to race in their examinations of education politics. Scholars have examined how racial groups are represented, engaged, or neglected in governance and decision-making practices (Garcia Bedolla, 2012; Jackson & Cibulka, 1991; Reed, 1991). Others have demonstrated how intra- and interracial politics impede or facilitate policy creation and implementation (Dumas, 2011; Henig, Hula, Orr, & Pedescleaux, 2001). Scholars examining the politics of charter schools and CMOs have also employed racial analyses, revealing the exclusion of communities of color from democratic processes (Buras, 2011; Scott, 2011) and the emerging racial divide between CMO leaders and the communities they serve (Scott, 2008). While this scholarship advances our knowledge of the racial politics of charters and CMOs, more inquiries are still needed. In particular, the ways in which racial groups interact and the degree to which race and understandings of racial groups are mobilized in coalition-building efforts remains underexamined.

Overall, there are conceptual and empirical gaps in the literature on CMOs and their surrounding racial politics. Despite their growing presence in the charter landscape, CMOs and their political behaviors are infrequently the focus of scholarly investigation. Moreover, how politics and race intersect with CMO efforts to engage disparate stakeholders in sustaining their organizations remains underexamined. Given the racialized patterns surrounding CMO proliferation, investigations of local racial politics are a critical addition to the research field as they can expose how relationships advance or impede equity within charter and CMO reform.

Conceptual Approach

To investigate these phenomena, I utilized an interdisciplinary framework that synthesizes the central tenets of urban regime theory with sociological understandings of race and racial formation. Urban regime theory investigates coalition building and the formal and

informal interactions that surround political processes. While regime theory suggests how race compounds coalition dynamics, I synthesize this theory with sociological understandings of race and racial formation to capture a more comprehensive array of racial politics.

Urban Regime Theory

Emerging from political science, urban regime theory envisions politics as a two-way relationship between the state and the market and explains how shifting economic orders require local officials to engage with the private sector to enact policies (Stone, 2008a). Because regime scholars assume an interconnectedness between politics and the economy, they posit that politics should be analyzed through the lens of coalition governance. They suggest that political and civic mobilization is no longer the sole purview of government officials and institutions (Stone, 2008a). Instead, they delineate the informal yet relatively stable arrangements that facilitate the formal workings of public agencies and authorities (Stone, 1989). In doing so, regime theorists expose how public agents require a coalition of governmental and nongovernmental actors to enact and sustain reform and how cooperation is achieved and maintained across institutional sectors and actors (Stone, 2008b). Conceptualizing governance in this way enables an analysis of coalition actors and how stakeholder resources (e.g., money, political and community connections) shape the composition of coalitions and its objectives.

This framework also enables an examination of the informal and formal relationships that circumscribe reform efforts. Regime theory captures the relational processes surrounding cooperation and the strategies for engagement that are used to secure it. It also highlights instances of conflict that arise amid coalition governance and exposes the evolving competitive processes that can affect reform, including how coalition members utilize resources to inform the elevation of particular priorities over others. A final factor affecting coalitions are local histories. Local histories affect stakeholders' willingness to engage or remain in coalitions as they inform actors' decisions to support reform efforts (Trujillo et al., 2014).

Some regime theorists demonstrate how race confounds coalition governance (Henig et al., 2001). Scholars have exposed how historically-created interracial distrust inhibits the maintenance of coalitions (Stone, 2008b; Trujillo et al., 2014). Others have shown how intragroup race relations can serve as sources of power and solidarity while simultaneously encouraging intergroup conflict (Orr, 1999). Researchers have also investigated the role of Black leadership in facilitating the inclusion of racial groups in reform coalitions and in alleviating racial tensions and distrust (Henig et al., 2001). Collectively, these analyses explore the impact of racial histories and racial representation in coalitions, noting if or how racial group interests are advanced and how intra- and intergroup trust operates.

Sociological Understandings of Race and Racial Formation

Urban regime theory expands thinking in the politics of education beyond instrumentalist visions of implementation and evaluation to more complex interactions between and within networks and racial groups. At the same time, regime theorists have conducted their analyses in ways that limit their examination of racial politics. Specifically, they have minimized how racial structures impede communities of color from acquiring key resources that could enable entrance and power within coalitions (Horan, 2002) and how these structures and discourses are activated in the coalition-building process. These limitations stem from the fact that few regime theorists incorporate an explicit theory of race into their political investigations. In this study, I address

this limitation by incorporating sociological understandings of race and racial formation with urban regime concepts to capture a broader array of racial dynamics in CMO coalition building.

This sociological perspective asserts that race remains a central organizing principle in our society (Omi & Winant, 1994) and in turn, affects all aspects of coalition governance. It assumes that social, political, and economic forces have historically and continually affected the material, social, and symbolic resources racial groups amass (Mills, 1999; Omi & Winant, 1994). These resource differentials shape coalition composition and the competitive processes surrounding formal and informal relationships in coalitions. Understanding race as a central axis of coalition governance also suggests that intra- and intergroup race relations are quintessential characteristics of relationships and local histories, serving at times as sources of conflict and distrust. In elucidating race's role in coalition processes, this conceptual approach extends urban regime theory by moving race from a concept that is peripherally examined to one that is centrally engaged and more comprehensively understood.

This theoretical approach also asserts that understandings of race are continuously acted upon and negotiated in social interactions (Haney López, 1994; Omi & Winant, 1994). These understandings of race and racial groups are revealed in strategies of engagement as individuals seek to recruit different racial groups onto their coalitions and espouse particular organizational missions and priorities. Here, discourse is instrumental in conveying racialized ideas and the often-subtle ways that understandings of racial groups are conveyed through language (Bonilla-Silva, 2006). At a fundamental level, race involves discourse, or the manner in which language, texts, and imagery create social understandings of race (Jiwani & Richardson, 2011). Race and racialized identities are largely formulated by texts and language. They are learned, acquired, and legitimated in discourse and representation practices (Hall, 1997; van Dijk, 2002). These discursive processes can contribute to the reification of hierarchical race relations, but they also represent a vehicle through which individuals can resist and mitigate rigid and persistent racial structures.

By synthesizing the two frameworks, this approach captures the political and racial dynamics of CMO efforts to manage their organizations. Urban regime theory enables an understanding of the actors, conflicts, and power relations in CMO coalitions. In terms of race, regime theory illuminates the dynamics of racial representation, interest advancement, and inter- and intragroup relations. The application of a sociological theory of race to regime analysis extends this political framework by enabling an investigation of how race structures the interactions among racial groups and the messages conveyed in CMO efforts. This conceptualization shifts race from a static notion that can be measured by the presence or interest advancement of racial groups to a dynamic one that acknowledges how race operates and evolves in relational and microlevel dynamics.

Investigating CMO Racial Politics and Stakeholder Engagement

This study explores the racial politics surrounding CMO coalition-building efforts in one urban area. This study asks four primary, interconnected research questions.²

² The subsidiary questions represent ideas I explore in data collection and analysis to answer the overarching questions.

1. **How do racial politics interact with CMO efforts to sustain their organizational position in the local CMO marketplace?**
 - a. How have racial politics and racial discourse surrounded educational reform efforts in the post-*Brown* era?
 - b. How do actors describe the political, economic, racial, and/or educational landscape of the locale (historically and currently)?
 - c. How, if at all, have these local dynamics affected CMOs' ability to establish their organizational presence and to secure a coalition of supporters?
2. **How do CMO leaders engage and recruit various stakeholders to support their organizations?**
 - a. Who is identified as key actors in CMO governing coalitions? Who is excluded?
 - b. What material, relational, and discursive strategies do CMOs use to 'bring them' into their coalitions?
 - c. How, if at all, do approaches, interactions, or materials differ as they engage with different coalition members?
3. **How do competitive pressures in the marketplace affect CMO coalition-building practices?**
 - a. What are the priorities and interests of CMO personnel and their coalition members?
 - b. How do material, social, or symbolic resources affect the interests that are advanced in CMO efforts?
4. **How are race and racial groups' interests considered and addressed throughout the process?**
 - a. How, if at all, has race been an issue in CMO sustainability efforts?
 - b. How does race affect coalition composition and the relational processes of coalition governance?
 - c. What messages (e.g., race-based or other) are invoked in CMO strategies?

Data sources for this study included 57 semi-structured interviews, 573 organizational documents, and approximately 60 hours of observations, which are analyzed via deductive and inductive coding (Miles & Huberman, 1994) and Critical Discourse Analysis (van Dijk, 1993b).

To understand coalition-building efforts, I employed an embedded case study approach (Yin, 2013). I examined a population of 10 CMOs operating in one urban area with an in-depth analysis of three CMOs that vary distinctively in organizational status to consider how efforts to sustain their legitimacy affects coalition-building dynamics. The CMOs at the center of this study operate in Birchwood,³ a city characterized by the critical dimensions that are conceptually investigated in this study. Birchwood has a storied history of community activism to mitigate economic, political, and social shifts that have been acutely felt along racial lines in the city limits. These community-based political efforts are frequently motivated by the need to advance racial equity and thus provide descriptive and theoretical insights into the racial and political dynamics explored in this study. In addition to the city's robust racial politics, Birchwood has a charter-rich educational context that has spurred many to engage in political efforts to oppose or bolster the sector. With these features, Birchwood represents an exemplary case of the intersection between CMO reform and racial politics.

³ I use pseudonyms for the city and the CMOs operating within its boundaries to maintain the confidentiality of the study's participants.

Dissertation Overview

My analysis reveals that racial politics complicate the degree to which the CMO population at the center of my study advances racial equity. The CMO leaders in the study engaged in both explicit and implicit race-based political efforts to sustain their organizations and manage stakeholder perceptions, yet, in doing so, faced new challenges in maintaining their equity orientations. Issues related to racial representation, competition, and the engagement of diverse stakeholders contributed to the challenges and opportunities that CMOs faced. On one hand, CMOs engaged in race-conscious strategies to counteract anticipated critiques of the sector's systematic exclusion of the city's Black community. To address concerns, CMOs also sought to diversify their teacher and leadership ranks, which served as a political resource in their attempts to manage stakeholder perceptions of their organizations. The CMOs also used implicit racial appeals that morally and symbolically aligned their organizations with the advancement of racial equity for parental and teacher audiences. At the same time, they used implicit racial appeals with donors that suggested a contrasting orientation. With funders, these organizations utilized the testimony of parents and students of color to convey the organization's impact through beating-the-odds narratives that advanced derogatory characterizations of marginalized racial groups and urban communities. While varying in how race was acknowledged and invoked with stakeholder groups, CMOs nonetheless strategically used race and racial frames that would resonate with their audiences to garner support in the competitive charter landscape. In this way, race and racial messaging operated as form of political currency in CMOs efforts

CMO efforts to align themselves politically and morally with disparate actors also yielded conflicting discursive frames. To sell their brand to multiple audiences, CMOs crafted and conveyed subtle racial narratives that aligned with what they perceived as the racialized values and norms maintained by stakeholder groups. For some stakeholders, these narratives were positively connoted. For others, especially groups who maintained financial, political, or racial power, CMOs circulated deficit-laden messaging that reified negative understandings of racial groups to create a justification for their institutional presence or to secure increased funding. Overall, CMOs deployed competing racial frames to maintain stability, to secure critical resources, and to enhance brand legitimacy in the competitive educational market. At the same time, advancing these incompatible themes has implications for their equity commitments. On one hand, the circulation of deficit-laden characterizations of nondominant groups in any context reifies negative understandings of racial groups, which affects how the U.S. deals with race collectively. In addition, CMOs selectively deployed this discourse to sustain their organizations in the competitive Birchwood context, revealing how competition can drive equity-oriented leaders to employ racialized tactics that undermine their intentions and further reify educational and racial inequity in the pursuit of organizational interest.

The first four chapters frame the study. I begin in Chapter Two by empirically situating this research. I present a literature review of the research on CMOs and the politics of education, elucidating the literature's theoretical and methodological approaches, its varying attention to race, and the conceptual and empirical gaps that this study addresses. Chapter Three presents a detailed description of the study's interdisciplinary framework and the conceptual tools it contributes to an investigation of racial politics within CMO reform. Finally, Chapter Four describes my research methodology and data collection and analysis procedures.

The next five chapters describe the study's findings and conclusions. Chapter Five contextualizes CMO efforts in national education reform movements and their accompanying

racial politics. I present a historical analysis of four policy waves in the post-*Brown* era to demonstrate the evolving nature of racial politics in the U.S. and to suggest that CMOs represent a critical case of these dynamics and their evolution amid a changing sociopolitical climate. Chapter Six reveals the distinct political and racial dynamics that circumscribe CMO efforts in their local context. Birchwood's sociopolitical context was characterized by opportunities and challenges with which CMOs would contend in securing supportive coalitions, including a widely-held distrust of external governance and the charter sector's differential recruitment and inclusion of particular racial groups. Chapters Seven and Eight describe how CMOs used political and racialized behaviors to respond to the political environment and to engage stakeholders within the competitive Birchwood charter marketplace. Chapter Seven assesses the relational and discursive strategies used by the CMO population, noting how engagement varied depending on the target audience and how race was overtly or implicitly deployed in that process. Chapter Eight explores these patterns as they relate to the embedded cases, which vary distinctly in their organizational legitimacy. The dissertation concludes with a discussion of the study's major findings, its topical, conceptual, and methodological contributions, and its significance to practice, policy, and research.

Significance

In its focus on CMOs, this study draws more scholarly attention to the distinct political and racialized behaviors of these rapidly growing actors in public education. In addition to its topical contribution, this study extends the politics of education field with its interdisciplinary approach. Few studies employing political frameworks incorporate an explicit theory of race in political analyses and thus fail to capture the multifaceted manner in which race operates in policy efforts. By synthesizing tenets from political science and sociology, I examine race as an evolving and dynamic concept that can be investigated through both traditional political concepts like coalition governance and lesser-employed sociological concepts related to racial representation and discourse. My examination of messaging through the use of Critical Discourse Analysis also provides conceptual and empirical contributions as discourse has been underexamined in political processes. This study demonstrates how discursive analyses can be methodologically incorporated into policy scholarship to capture how language and power are deployed in political processes. Finally, this research has practical contributions for educational leaders. As leaders navigate urban contexts, my research suggests new areas for development so that practitioners can enact community-responsive practices that enable equitable partnerships.

Chapter 2: Literature Review

As advocates promote CMOs to scale up the number of high quality charter schools, researchers are beginning to examine these proliferating institutions and their ability to advance opportunities for nondominant communities. Most studies examine CMOs' ability to redress inequity by delineating the sector's growth and its impact on student achievement. Others engage in descriptive analyses to investigate CMOs' distinct organizational features and the factors affecting their growth and sustainability. A growing subset of research on CMOs attends to its surrounding politics. In this scholarship, researchers employ a variety of approaches to elucidate how power and influence work in the charter and CMO sector and how it can facilitate or impede the advancement of educational equity. In many of these studies, researchers shed light on racialized patterns in CMO practices, yet an assessment of this research reveals that racial politics within this reform movement remain underexamined and undertheorized.

In this chapter, I evaluate the CMO knowledge base. I first discuss the main topical foci and empirical approaches in CMO research, revealing its conceptual and methodological coherence to the broader scholarship on charter schools. In this analysis, I also elucidate how scholars have examined race. I argue that a more dynamic conceptualization of race is needed to understand how race works within CMO efforts. Because of this study's focus on racial politics, I also present an overview of the research in the politics of education field and how it has conceptually and methodologically explored CMO politics. In this discussion, I analyze the field's approach to investigating racial politics, highlighting how scholars have uncovered broad patterns of racialized governance and interest advancement in charter reform but have rarely focused on CMOs as an organizational unit or CMOs' microlevel racial, political dynamics. I argue that this omission has made it difficult to determine if CMOs engage in distinct political and racialized behaviors at the local level.

The Growing Scholarship on CMOs

The research on CMOs is a growing body of literature that emerged from scholarship investigating charter schools over the past two and half decades. In examining the broader charter sector, researchers have described the growth of these institutions and interrogated the assumptions undergirding their theories of action. Through statistical and survey-based analyses, scholars have investigated charter school growth and enrollment, delineating national and regional trends (Frankenberg et al., 2010; National Center for Education Statistics, 2015; Orfield et al., 2012; Wells, Holme, Lopez, & Cooper, 2000). Scholars have also quantitatively investigated charter schools' academic performance (Barr, Sadovnik, & Visconti, 2006; Buddin & Zimmer, 2005; Carnoy, Jacobsen, Mishel, & Rothstein, 2005; Center for Research on Education Outcomes, 2013a; Hoxby, 2004; Welner, 2013), their competitive effects (Arsen & Ni, 2008; Bohte, 2004; Booker, Gilpatric, Gronberg, & Jansen, 2008; Carr & Ritter, 2007; Imberman, 2008), and their ability to spur innovative and responsive practices (Bifulco & Ladd, 2006; Mintrom, 2003; Yatsko, Gross, & Christensen, 2009). While this scholarship has enabled researchers to holistically analyze the sector's impact, it has generated inconclusive evidence of the degree to which these public-private institutions have fostered the improvements they were intended to facilitate.

Qualitative studies on charter schools have complemented and complicated many of the trends identified in quantitative research. Typically employing holistic or comparative case study

approaches, researchers employing this methodology have captured charter processes as they unfold in daily practice to investigate how innovation, competition, and stakeholder responsiveness are facilitated in charter settings. For instance, scholars have used qualitative methods to understand how leaders respond to competitive pressures in educational marketplaces. These scholars have indicated that charter and traditional public school leaders alter their practices in response to competition, but these altered approaches are often those that do not enhance school quality (Hess, Maranto, & Milliman, 2001; Jabbar, 2015b; Loeb, Valant, & Kasman, 2011; Lubienski, 2005). Others have investigated how parent involvement is fostered or inhibited in charter settings (Smith & Wohlstetter, 2009; Wohlstetter, Malloy, Hentschke, & Smith, 2004) and explored the degree to which charter schools have instituted innovative instructional approaches (Gross & Pochop, 2008; Neumann, 2008). These interview and observation-based approaches provide a window into charter school processes on the ground level. At the same time, they generate mixed evidence of the sector's impact.

Because the scholarship on CMOs emerged from charter school research, researchers have followed suit in examining CMOs through similar conceptual and methodological approaches. In the following sections, I describe how CMO research coheres to empirical patterns in charter school research while noting distinct research threads pertaining to the sector's focus on replicability.

CMO Growth and Enrollment

Much of the research on CMOs describes their numeric and geographic proliferation. This research, which mostly consists of reports generated by independent research or evaluation agencies, suggests that CMOs represent a growing subset of charter schools. For example, one report stated that CMOs now constitute about 20 percent of the charter landscape (Miron & Gulosino, 2013) while another demonstrated that CMOs grow their presence by approximately 12 percent annually (Lake et al., 2010). While reports vary in their assessment of CMO growth because of the lack of institutional tracking of this sector, the studies nonetheless provide descriptive statistics that show the increasing presence of these institutional actors across the landscape. In addition to their growing presence, reports also demonstrate the concentration of CMOs in particular states and municipalities. One report noted that 67 percent of CMOs exist in five states—California, Texas, Arizona, Ohio, and Illinois—with California holding the largest share of public school students in CMOs (Lake et al., 2010; Miron & Gulosino, 2013). CMOs also hold the market share of charter schools in many urban areas, including New Orleans, Chicago, Los Angeles, New York City, and Washington D.C., where they operate between 25 to 50 percent of the charters in their respective cities (Lake et al., 2010).

With their disproportionate presence in these states and urban areas, researchers have shown that CMOs tend to enroll a greater number of Black and Latino students (Hoxby & Murarka, 2009; Miron, Urschel, Mathis, & Tornquist, 2010). One study indicated this when comparing demographic data between students entering CMOs and their host districts. The average CMO had a student population that was 91 percent Black and/or Latino compared to 76 percent of their host districts' students in equivalent grade levels (Furgeson et al., 2012). The same study also indicated that this pattern was consistent with regard to low-income students wherein 71 percent of entering CMO students qualified for free and reduced lunch status in comparison to 64 percent of students in their traditional public school districts. While serving higher percentages of low-income students of color, reports have also indicated that like other charter schools, CMOs serve a lower number of English Language Learners and students with

special needs when compared to their host districts (Estes, 2004; Furgeson et al., 2012). Overall, these quantitative descriptive analyses provide insights into CMO growth and their racialized enrollment patterns. While these reports vary in their peer review status begetting questions of academic rigor, the body of scholarly and independently-generated evidence point to these growth and demographic trends.

CMOs and Charter Schools' Intended Effects

Like the literature on charter schools, researchers have sought to investigate if and how CMOs are advancing charters' intended effects related to achievement, innovation, and stakeholder responsiveness. Most reports utilize quantitative statistical analyses to describe CMO achievement patterns, occasionally calling attention to the performance levels of racial subgroups. The reports vary in scope. Some focus on the academic results of specific CMOs like the Knowledge Is Power Program (KIPP) and Green Dot Public Schools (Angrist, Dynarski, Kane, Pathak, & Walters, 2012; Colby & Wicoff, 2006; Gleason, Tuttle, Gill, Nichols-Barrer, & Teh, 2013; Lazarin, 2011) while others assess the entire movement's academic impact (Center for Research on Education Outcomes, 2013; Furgeson et al., 2012; Miron & Gulosino, 2013).

The reports have generated mixed evidence with regard to CMO performance. While many of the organization-specific studies describe positive academic results for CMO students, the national studies provide a more complex picture. One independent report, which employed regression analyses of performance score matching for CMO and non-CMO students, indicated a positive overall impact on math and reading achievement while noting the wide variance among CMOs (Furgeson et al., 2012). Another study utilizing student-level results from 2006 to 2010 compared CMO performance to the performance of students attending non-CMO charters and traditional public schools. It indicated that CMOs had reading results that were weaker than non-CMO charters but stronger than students in traditional public schools and math results that were stronger than non-CMO charters but weaker than those for traditional public schools (Center for Research on Education Outcomes, 2013). Further complicating these findings are quantitative studies that demonstrate that CMOs fail to serve severely disadvantaged populations (Carnoy et al., 2005; Miron et al., 2011; Rothstein, 2004) and maintain high attrition rates for students of color. For instance, Vasquez Heilig et al. (2011) demonstrated that KIPP's attrition rate for Black youth surpassed their peer districts in Texas, suggesting that the CMO may be counseling out Black students. Taken collectively, these studies detract from the oft-reported academic achievement of CMOs and provide quantitative evidence that these organizations may be engaging in practices that have ramifications for marginalized racial groups.

Researchers have also investigated if and how CMOs utilize innovative pedagogical and organizational practices. In their examinations, researchers have conducted mixed method case studies of nationally represented CMOs. Their research suggests that when compared to traditional school districts, CMOs typically offer more instructional time, allow for more curricular autonomy, engage in targeted teacher recruitment and performance-based compensation, and incorporate comprehensive behavior policies (Chadwick & Kowal, 2011; Furgeson et al., 2012; Lake et al., 2012). At the same time, these studies primarily draw upon surveys and interviews with CMO personnel in making these comparisons, making response bias a potential confounding factor in these reports. Scholars have not detracted from the studies delineating CMO characteristics, but have instead used qualitative sociological analyses to suggest how these practices can be problematic for student development and stakeholder responsiveness. In particular, researchers have drawn upon observations, interviews, and

documents to interrogate CMO disciplinary practices, which can include pervasive adult monitoring, student derogation, and disciplinary action for behaviors unassociated with learning (Goodman, 2013). In their analyses, scholars have noted how these disciplinary practices contribute to teacher turnover (Torres, 2014) and quell student motivation and agency (Goodman, 2013; Sondel, 2015). Furthermore, in her 18-month ethnographic study of a no-excuses CMO, Golann (2015) argued that the CMO was perpetuating culturally unresponsive practices by reinforcing class-based skills and behaviors. The questions arising from CMO discipline practices work in conjunction with the research exposing selection and attrition patterns to suggest that CMOs may engage in unresponsive practices that undermine their stakeholder responsiveness.

Like the research on charter schools, the scholarship on CMOs has yielded inconclusive evidence as to their impact on achievement, innovation, and stakeholder responsiveness. While varying in their peer-reviewed status, quantitative statistical analyses demonstrate CMOs' variable impact on student achievement and how student composition and attrition affect these outcomes. Interview and survey-based studies have suggested that CMOs engage in distinct behavioral and pedagogical practices. At the same time, the reliance on data from CMO personnel in drawing these conclusions and the qualitative studies revealing the negative effects of disciplinary practices on CMO stakeholders inhibit scholarly conclusions from being definitively made.

CMOs and Replication

A distinct body of research on CMOs has emerged, which examines their growth processes and organizational features. Scholars have shown how CMOs differ in their approaches to replication. Some researchers suggest that CMOs grow in two different manners: corporate style growth or franchising (Bennett, 2008; Scott & DiMartino, 2010). In the former, CMOs exert more control over each school site through central management, resulting in the ability to replicate with more fidelity but at a slower pace. With the franchised model, CMOs employ a decentralized approach that allows for more school site autonomy, which facilitates rapid expansion often at the expense of brand fidelity and school quality. Farrell et al. (2013) generated a different typology to describe CMO growth styles from their qualitative analysis of documents and interviews with 25 CMO leaders from around the country. They explained that CMOs can enact premeditated growth approaches based upon strategic objectives and data-driven analyses of local school markets, organic growth approaches in response to community or stakeholder demand, or opportunistic growth “based entirely on the availability of resources (e.g., facilities, school leaders, money, community support) that were deemed most critical for scale-up” (p. 88).

In addition to growth approaches, scholars have also investigated the factors that facilitate or restrict CMO expansion. Funding is one prominent theme within this research wherein scholars suggest that CMOs have an overreliance on philanthropic support (Quinn, Tompkins-Stange, & Meyerson, 2014; Reckhow & Snyder, 2014). For example, in a report that analyzed CMO business plans and interviews with CMO senior leaders, Lake et al. (2010) suggested that CMO dependency on philanthropy complicated the degree to which they could meet their original growth targets. In an interview-based study of 50 CMO leaders from across the country, Wohlstetter et al. (2011) noted that while CMOs relied on a variety of public and private sources to support network growth, their reliance on philanthropic funding made it so that funders' requirements and expectations shaped the growth process. In addition to funding,

scholars have conducted qualitative studies to explore how central office features affect the growth process. In one study of 25 representative CMOs, Farrell et al. (2012) drew upon interviews with CMO leaders to understand how organizational structures affected efforts to scale up. In this study, CMO leaders described the importance of professional development to sustain operations and programmatic fidelity and central office capacity, particularly around marketing and data analysis, to manage growth efforts.

Studies delineating CMO replication and sustainability processes have primarily drawn upon qualitative approaches. Through document and interview data, researchers have complemented quantitative studies on CMO proliferation by highlighting how this growth is sustained by CMO leaders in practice. Through this scholarship, many researchers have investigated issues of power through their attention to funding and the disproportionate influence that philanthropic groups have over growth and sustainability processes. At the same time, these investigations of power and influence in CMO processes remain devoid of analyses that examine power through a racial lens.

Critical Perspectives on CMOs

A growing number of researchers are critically interrogating the internal practices and organizational features of CMOs. Specifically, the issue of CMO funding is heavily critiqued as scholars examine these practices and their implications. Some have exposed the increasing role of venture philanthropy in the CMO sector, questioning philanthropic influence on decision making and noting the economic insecurity that CMOs face if financial support is withdrawn (Reckhow, 2012; Scott, 2009). In addition to the funding sources they secure, scholars have investigated CMO spending practices to consider if or how these organizations benefit from greater financial resources. In one study of CMOs operating in New York, Ohio, and Texas, researchers used statistical analysis to compare per-pupil spending rates of CMOs to their local districts (Baker, Libby, & Wiley, 2012). While comparative funding varied across the states, the researchers found that high-profile CMOs like KIPP and Achievement First consistently outspent local school districts, generating questions regarding the sector's efficiency and the distribution of resources across traditional public and CMO schools.

Critical researchers have also investigated how race undergirds CMO efforts and practices. For instance, scholars have denoted the demographic differences between CMO leaders and the communities they serve. Scott (2008) revealed the predominance of wealthy white leadership among network leaders in her document-based, historical analysis of the identities, philosophies, and funding sources of these new "managers of choice" and its implications for authentic engagement with marginalized communities. Other qualitative studies have generated insights into the racial discourse patterns utilized in the promotion of CMO expansion. In her examination of Chicago, Lipman (2011) drew upon research reports, archival documents, and ethnographic data sources to illuminate how actors with business and social class interests pathologized race to justify school closure, charter and CMO expansion, and the restructuring of urban space. Similarly, Buras (2011) examined the racial, economic, and spatial dynamics of charter reform in post-Katrina New Orleans through historical, documentary, interview, and observational data to highlight how race was pathologized in the "strategic assault on Black communities by educational entrepreneurs" (p. 296). In these two studies, CMOs were not the central focus of the investigations, but CMOs were prominent institutional actors in the respective cities, making them a part of the analysis. Overall, in this critical scholarship,

researchers have employed mixed methods to reveal how CMOs engage in practices that generate power differentials, including those felt along racial and class lines.

Strengths and Limitations of the CMO Research Base

The scholarship on CMOs has provided key insights into this growing actor in public education. Researchers have primarily employed quantitative analyses to delineate the growth of the sector, its enrollment patterns, and its impact on student achievement. Scholars employing qualitative and mixed-methods approaches have complemented this research by drawing upon interview and survey data to describe CMO growth approaches and practices that inhibit or support expansion and sustainability. A more critical line of scholarly work has emerged that reveals CMO funding practices. Through both quantitative and qualitative approaches, scholars have demonstrated the large presence of philanthropic funding in the CMO sector and exposed its effect on per-pupil spending. Through these studies, researchers have described the potential sociopolitical and economic tensions that arise from CMO dependency on this funding source. While the research base is largely composed of unrefereed reports, the growing body of agency-produced and scholarly research has provided a description of the CMO landscape, its distinct characteristics, and its potential implications for equity and democracy.

Beyond these insights, the literature on CMOs remains underdeveloped with regard to how race operates in CMO efforts. The aforementioned quantitative studies have shed light on the racialized patterns of achievement, enrollment, and attrition that characterize the sector, yet the predominance of quantitative studies provides a limited assessment of race and CMOs. In primarily employing descriptive and statistical analyses, researchers have treated race as a variable and thus demonstrated the quantitative impact of CMOs *on* communities of color rather than considering how race continuously influences patterns of engagement and schooling practices. A few qualitative researchers have begun to elucidate how race and perceptions of racial groups are mobilized in CMO efforts. Scholars have delineated racialized patterns of CMO leadership through historical and document-based analyses. Through interviews, observations, and archival data, others have described how CMO leaders and their surrounding networks invoke race to justify the restructuring of urban space. At the same time, these studies provide broad assessments of these racial dynamics and/or their interplay with city-level policies. Missing from this literature is an investigation of how race influences and affects CMO sustainability efforts and their interactions with key stakeholders at the local level. As CMOs advance their networks with the purpose of increasing equity for marginalized groups, how race operates in their approaches can hinder or facilitate their ability to authentically engage with communities. Yet, the scholarship, particularly qualitative studies of CMO growth, typically omits racial analyses from process-based examinations. This study employs a qualitative approach to capture these racialized and localized processes.

The Politics of Education, Charters, & CMOs

In addition to its topical and empirical contributions to the research on CMOs, this study contributes to the literature examining the politics of education. In the following sections, I provide an overview of this research field and demonstrate how scholars have approached their examinations of charters and CMOs through political frameworks. Furthermore, I describe how racial politics have been investigated in this field. While I note that scholars of the politics of education have typically engaged in deracialized analyses, I provide an overview of the growing body of research that does foreground and analyze race in education politics.

Politics of Education

The politics of education has been centrally concerned with concepts derived from political science and Lasswell's (1936) questions of "who gets what, when, and how." Scholars in this field have investigated these central questions through various theoretical lenses. For instance, while still utilizing political frameworks and their methodological traditions, the field has evolved to include the application of economic theories like rational choice and econometrics to explore bureaucratic decision making, legislative action, and voting behavior (Wong, 2003). Despite the evolution of the field, scholars remain primarily focused on particular phenomena—the way governance is structured, the distribution of power, the management of conflict, and the processes surrounding education policies (López, 2003; Scribner & Englert, 1977).

Scholars in this field examine governance, power, conflict, and processes among and between groups and agencies at various institutional levels. Typically, scholars have investigated macrolevel shifts in the roles of state and federal agencies in education policymaking and implementation, revealing varying levels of federal or state influence over time and how intergovernmental coordination shape policy outcomes (Anagnostopoulos, Rutledge, & Bali, 2013; DeBray-Pelot & McGuinn, 2009; Mazzoni, 1993; Sroufe, 1994; Wirt & Kirst, 2009). At the mesolevel, researchers have employed political frameworks to examine how power, influence, and decision making operate and influence reform dynamics at the city and district level (Honig, 2009; Shipps, 2003; Stone, 2008; Trujillo, 2012a). For example, Trujillo (2012a) drew upon theories of democracy to reveal how closed decision-making practices characterized school board governance amid a high-stakes accountability context, which led to the implementation of centrally determined reforms and individualistic measures of achievement. Finally, scholars have also examined micropolitics, or how school-level actors respond to and engage with reform directives (Björk & Blase, 2009; Datnow, 2000; Hargreaves, 1991; Malen & Cochran, 2014; Mawhinney, 1999). Through micropolitical analyses, researchers have captured how leaders and teachers enact education reform, often revealing how these actors symbolically adhere to or overtly resist policies. Methodologically, scholars analyzing political processes at various institutional levels have employed mixed methods in multisite or single case studies to capture these dynamics. Overall, while varying in their unit of analysis and the degree to which they capture relational dynamics (McDonnell & Weatherford, 2000), these studies have explored how power, governance, and processes shape policy creation, implementation, and outcomes.

Within their examination of power and politics, many scholars have maintained an analytic eye to how competing values, ideas, and priorities are mobilized amid reform efforts (Stout et al., 1994). For instance, many scholars have utilized Kingdon's (2002) concepts of *policy entrepreneurs* and *policy windows* to elucidate how actors or interest groups advance particular priorities and agendas in the education arena (Boyd, Christman, & Useem, 2008; Marshall, 2002; Mintrom, 1997; Shipps, 2011; Sondel, 2015). Within this literature, scholars have conducted interviews with actors of interest and engaged in policy and organizational document analysis to delineate how advocacy coalitions and foundations advance reform ideas within their networks (McDonnell & Weatherford, 2012; McGuinn, 2012; Scott, 2009; Scott & Jabbar, 2014). Other researchers have examined how values and attitudes are activated at the meso- and microlevel to resist equity-oriented reform. For instance, Dumas (2011) drew upon interviews with Black leaders and historical archives to describe the long and systematic political efforts of Seattle's more affluent, white community to delegitimize the city's school desegregation plan. He demonstrated how economic and racial tensions circumscribed these efforts and how desegregation opponents espoused civil rights and justice-oriented rhetoric to

preserve privileges. At school sites, researchers have shown how detracking efforts provoke fierce resistance from parents and staff and reveal underlying attitudes that affect reform (Oakes, 2005; Trujillo, 2012b). For instance, in a case study of one school district instituting a rigorous instructional approach, Trujillo (2012b) analyzed interviews, documents, and observational data and demonstrated how teachers and leaders justified their resistance to pedagogical rigor and detracking often through their beliefs of the academic abilities of the nondominant groups the reform was intended to serve.

Overall, scholars in the politics of education field have elucidated how power, governance, and conflict shape policy enactment, implementation, and outcomes. While varying in their political frameworks and units of analysis, scholars have consistently used mixed methods and qualitative approaches to investigate these dynamics. In doing so, they have emphasized issues of control, decision making, and influence and have shown how interactions and processes are shaped overtly or covertly by the “authoritative allocation of values” (Easton, 1965).

Charter and CMO Politics

Charter school politics. Like scholars of the politics of education, researchers have utilized political frameworks to investigate charter politics, government agencies, and the processes surrounding charter policy enactment and dissemination. For instance, through the policy innovation diffusion framework, Mintrom and Vergari (1997) assessed the state-level factors that prompted states to enact permissive or restrictive charter laws. Drawing upon data from a 50-state survey of education policymakers, they found that differences in interstate networking (e.g., neighboring states with charter law, presence of out-of-state choice advocates), school characteristics (e.g., low student performance, prior choice policies), and state politics (e.g., Republican control of legislature, presence of policy entrepreneur) affected the nature of charter school laws. Alternatively, Zhang and Yang (2008) examined charter policy diffusion at the local level by focusing on school district characteristics. In their event history analysis of Florida’s 67 districts over a six-year period, they found that the presence of charter schools in a given district was more heavily influenced by political and institutional factors (e.g., appointed superintendent, charter schools in neighboring districts, party leadership) than by the presence of educational need (e.g., low student performance, greater minority/low-income/special needs populations). Through these quantitative approaches, researchers captured macro- and mesolevel factors surrounding the adoption and proliferation of charter schools.

In addition to quantitative analysis of the political factors contributing to charter diffusion, scholars have used qualitative approaches to delineate the actors, networks, and advocacy coalitions advancing or opposing charter expansion. For instance, Vergari (2007) reviewed policy documents and previous research to generate a descriptive analysis of national advocacy coalitions engaged in the charter school debate. She identified the charter opposition faction as “the traditional coalition” of unions, school district officials, and other governmental personnel, and the “reform coalition” supporting charters, which included members of the business community, foundations, think tanks, and interest groups. Also employing an advocacy coalition framework, Kirst (2007) provided a nuanced perspective on the coalitions engaging in charter politics at the national and local level. In his overview of previous research and national and state charter policy documents, he argued that an aggregated assessment of national, political trends obscured the variance in state or local charter politics, which resulted from differences in state laws, local contexts, and educational needs. Finally, scholars have also investigated the

variability in charter support by examining the policy frames that have been mobilized in charter advocacy efforts (Bulkley, 2005; Lubienski, 2001; Wells, Grutzik, Carnochan, Slayton, & Vasudeva, 1999). Through interviews with policymakers and document analyses, these researchers revealed how ideas and messages were conveyed to include and exclude various groups in charter school coalitions.

A growing body of research has focused on the political and advocacy behaviors of charters themselves. For instance, through their framework emphasizing the duality of politics and the market, Henig et al. (2003) presented document-based evidence of charter advocacy efforts in the District of Columbia. In this analysis, the researchers suggested that while charters were often understood as private market actors, their public-private hybridity led them to engage in political behaviors with government agencies and officials to maximize resources and bureaucratic privileges. In a mixed-methods study of charter school personnel and policymakers in four cities, researchers demonstrated how factors like the local political climate and perceptions of public agency support influenced the degree to which charters engaged in advocacy efforts (Holyoke, Henig, Brown, & Lacireno-Paquet, 2007). Through these studies, scholars have begun to elucidate how charters politically engage and the factors that affect their political actions.

CMO politics. While there is a large body of research surrounding charter school politics, there is a dearth of scholarship on the politics surrounding CMOs specifically. Most research indirectly analyzes these institutions by including them in broader discussions of charter politics, making it difficult to distinguish if these institutions have distinctive behaviors and processes. The few studies that explore CMO politics have exposed the ideological, financial, and policy networks supporting CMO proliferation to demonstrate the alliances undergirding the movement (Baker et al., 2012; Scott, 2009; Wohlstetter et al., 2011). For instance, Scott (2009) generated a sociopolitical descriptive analysis of the role of venture philanthropy in charter school advocacy, delineating its large presence in support of CMOs. In doing so, she argued that political tensions accompany these funding practices, suggesting that the demand for growth and brand fidelity which is typically a parameter of philanthropic funding can generate less attention to community needs and input.

Beyond networks, others have considered how various policies and actors enable CMO growth (Farrell et al., 2012; Wohlstetter et al., 2011). One qualitative study investigated CMO leaders' perspectives on the external and internal factors enabling CMO expansion. In interviews, CMO leaders suggested that state policies (e.g., charter cap laws, per-pupil funding formulas), availability of facilities, and the attitudes of local figures (e.g., mayor, school district personnel, community leaders) were important factors that affected efforts to scale up (Farrell et al., 2012). A few scholars have also analyzed how CMOs employ ideas in their growth and sustainability efforts. One qualitative study comparing standalone charters and CMOs in California suggested that CMO leaders used the idea of "going to scale" to distinguish themselves from other charters. From archival data and interviews with CMO personnel, the researchers ascertained that CMOs use this frame as a strategic message to garner support from the private sector (Meyerson, Berger, & Quinn, 2010).

Assessment of the research on charter and CMO politics. Scholars have employed a variety of political frameworks to examine how charter and CMO politics unfold at various governmental levels. Through quantitative analyses, researchers have identified statistically significant factors that influence charter policy adoption and proliferation. Through interview and document-based approaches, scholars have delineated the coalitions supporting or opposing

charter and CMO reform, the ideas mobilized in charter efforts, and the advocacy-related behaviors these organizations display. Through this scholarship, researchers have illuminated how governance, power, influence, and conflict operate in charter efforts, yet less scholarly attention has been paid to the political behaviors of CMOs themselves. Through documents and interviews, the research on CMO politics has qualitatively elucidated the networks supporting CMO growth and the ideational and policy factors that affect their operations. Yet, there are few studies that use qualitative methods to reveal how CMOs engage politically at the local and relational level with stakeholders.

The Racial Politics of Education

Scholars in the politics of education have generated key insights into the dynamics surrounding various reforms, including charters and CMOs. While providing important contributions, the politics of education has generally neglected and undertheorized how race affects education politics. Scholars have argued that this field has assumed a colorblind orientation, tending to avoid discussions of race and racism and its potential impact on processes and outcomes (López, 2003; Scheurich & Young, 1997). In its emphasis on traditional political concepts like government, power, and conflict, the field has emphasized features of participatory democracy and civic practices like political action and influence strategies (López, 2003). Critics contend that this emphasis fails to account for the impediments nondominant groups face in exerting influence in policy networks or to capture how they seek influence and engagement. Furthermore, examinations of relational politics are often disconnected from analyses that consider how race affects power relations, shapes influences tactics, and informs resistance and accommodation in policy efforts (Marshall & Anderson, 1994).

Despite this general critique of the field, some researchers do explicitly attend to race in their examinations of education politics. For example, scholars have explained how marginalized racial groups are represented, engaged, or neglected in governance and decision-making practices (Garcia Bedolla, 2012; Jackson & Cibulka, 1991; Reed, 1991). Through both quantitative and qualitative approaches, these scholars have typically investigated school board representation and governance in decentralization efforts to demonstrate how marginalized racial groups seek or obtain decision-making positions and generate policies that directly address their needs. Others have conducted comparative or single case studies to investigate how intra- and interracial politics interact with policy creation and implementation (Buras, 2011; Dumas, 2011; Henig, Hula, Orr, & Pedescleaux, 2001; Lipman, 2011; Orr, 1996; Trujillo, Hernández, Jarrell, & Kissell, 2014). Drawing upon interview and archival data, these studies have highlighted the longstanding relational dynamics that undergird education reform efforts in urban areas and have revealed how racial group interest is attended to in policy efforts. Taken collectively, this growing subset of political research provides critical insights by centering the needs, perspectives, and issues facing marginalized racial groups within the traditional foci of the politics of education field. It has done so through quantitative analyses that detail racial representation in governance positions and through qualitative means that expose the interactions and processes by which marginalized racial groups vie for influence and responsiveness.

An emerging line of critical scholarship has also focused on the ways in which race is constructed in education reform (Dumas, Dixson, & Mayorga, 2016). Scholars have examined policies and their surrounding discourses through the lens of Critical Race Theory or critical whiteness theory. These studies, which typically include an analysis of archival and empirical evidence, have exposed how racial representation and ideologies are implicated in the

development, implementation, and discussion of specific reforms. In doing so, they show how racial constructions maintain systemic, hierarchical privileges for whites despite efforts to redress educational inequities (Au, 2016; Dumas, 2016; Flores, 2016; Gillborn, 2005; Leonardo, 2007). Other researchers go beyond an examination of specific policies to consider how race is constructed and circulated more broadly in reform movements (Dumas, 2013; Patel, 2016). For instance, in his critical reading of the racial representations advanced in the popular documentary *Waiting for Superman*, Dumas (2013) argued that the filmmakers reified the logics of neoliberal school reform by reproducing stereotypical understandings of Black families as disinterested and culpable for their lack of educational attainment. He argued that this depiction made it so that only school choosers and those Black families willing to take responsibility for their actions were sympathetic. Overall, in these studies, scholars demonstrate how racial discourse is central to education policy and market-oriented reform. As these scholars provide critical and discursive analyses of policy efforts, they connect macrolevel ideological factors to an understanding of the politics of education.

Racial politics and charter schools. Scholars examining the politics of charter schools and CMOs have also employed racial analyses, revealing the exclusion of racial groups from charter governance and political processes. In one study, Scott (2008) used a political and sociological lens to interrogate the networks, ideologies, and systemic effects of the predominantly white, male, elite leadership managing for-profit and nonprofit charter management organizations. In arguing that management organizations were gateways for a new leadership class, she suggested that these leaders “preserve an elite and privileged space in educational leadership and policy” (p. 154). Alternatively Buras (2011) provided a city-level depiction of how these dynamics unfolded in her case study of New Orleans. In analyzing documents, interviews, and observations, she exposed how entrepreneurs at various institutional levels created a racialized spatial economy that dispossessed New Orleans’ Black community from power in local schools and redistributed resources to mostly white elite outsiders to rebuild the city and its educational system after Hurricane Katrina. Others, too, have used qualitative approaches to highlight the racialized gatekeeping practices of charter authorizing bodies. In one case study of charter authorization in Louisiana, researchers engaged in a critical race analysis of interviews and archival documents (e.g., promotional materials, board meetings) and found that authorizers engaged in colorblind assessments of charter petitions, which yielded a paucity of charters granted to community-based and Black-led schools in favor of those that reified neoliberal and racialized logics (Henry & Dixson, 2016).⁴

Like the scholarship on the racial politics of education, there is a growing body of research that elucidates the racial subtexts embedded in the discourse reformers articulate to advance charters and CMOs. Some researchers have examined how racial equity is broadly conceptualized in the rhetoric of prominent charter advocates, often interrogating their invocation of civil rights. For instance, Scott (2013a, 2013b) described the marketized reconceptualization of civil rights, arguing that it stressed individual empowerment while deemphasizing communitarian goals that were central to the Civil Rights Movement. Drawing from historical, sociological, and policy literatures, her critical policy analyses suggested that these references and their accompanying policy solutions did little to address structural impediments that continue to limit opportunities for communities of color. In a second example,

⁴ It is important to note that while scholars document the onset of these negative and racialized practices, they frequently expose community resistance to these efforts (Buras, 2011; Henry & Dixson, 2016; Scott, 2011). In doing so, they reveal how marginalized groups unite and mobilize to counteract these policy initiatives.

Hernández (2016) used Critical Discourse Analysis to examine the linguistic practices of CMOs. In her qualitative study of the web-based marketing materials of two prominent CMOs, she revealed how CMOs subtly invoked race and deficit-laden characterizations of their student populations and suggested that the minimization of race could affect how leaders imagined educational solutions. Collectively, these qualitative studies expose how discourse and rhetoric undergird the racial politics surrounding charters and CMOs.

Strengths and Limitations of the Research Base on the Politics of Charters and CMOs

Researchers examining charter and CMO politics have employed multiple frameworks and methodological approaches to elucidate the manner in which power, influence, and relationships work in the charter and CMO sector. Methodologically, scholars have employed both quantitative and qualitative analyses that have enabled an understanding of macrolevel political patterns and more localized manifestations of charter and CMO politics. Topically, the literature on charter and CMO politics has provided key insights into the networks that bolster the movement and the political factors that constrain or facilitate charter proliferation. Researchers who center race in their political analyses have also made important contributions. In addition to pushing against the colorblind tendency of the field, scholars examining the racial politics of charters and CMOs have uncovered racialized patterns surrounding governance, decision making, and interest advancement in this sector and begun to delineate how discourse and racial representation is implicated in policy development and implementation.

While this scholarship advances our theoretical and practical knowledge of the racial politics of charters and CMOs, more inquiries are still needed. On one level, the research base has rarely focused on CMOs as an organizational unit, which makes it challenging to distinguish if these organizations have unique political behaviors. In addition, while the literature is composed of scholars who used interviews, observations, and document analysis in their methodological approaches, the research on charter and CMO racial politics has tended to advance broad assessments of CMO political behaviors. Though critical to the knowledge base, the research is limited in that it has yet to capture the microlevel, racial politics surrounding CMO sustainability efforts. Furthermore, few scholars have theorized and empirically investigated how racial discourse is deployed in the context of charter and CMO politics. These localized political and racial dynamics can reveal how power and influence operate in CMO processes and how racial inequities are reified or mitigated in this reform context. In this study, I use interview, observational, and document-based data to capture the multifaceted way that race intersects with CMO political efforts on the ground level.

Answered Questions & New Research Directions

In the past two decades, researchers have generated important insights on CMOs. Through research reports and other quantitative analyses, researchers have depicted and questioned the sector's geographic and numeric growth, its enrollment patterns, and its ability to facilitate increased student performance. Other qualitative and mixed-methods studies have elucidated their growth practices and approaches and exposed the sector's dependency on philanthropic funding. Other scholars have employed political frameworks to examine the ideological networks bolstering the sector and interrogated how structures and actors enable charter-friendly contexts. In these studies, racialized patterns of CMO practices have been delineated, suggesting how CMOs may engage in practices that negatively affect students and families of color despite their claims of redressing inequity.

Still, CMOs remain an underexamined feature of the charter landscape as they are often investigated within the broader frame of charter school reform. The inclusion of CMOs in broader research on charter schools prevents an examination of the sector's unique organizational characteristics and the manner in which racial dynamics intersect with their sustainability efforts. Furthermore, their distinct theory of action necessarily means that CMOs engage in strategic political behaviors to secure resources and to create coalitions that intersect with racial and political dynamics that can affect how power and influence operate. While the research base on CMOs has made important contributions, these localized racial and political dynamics remain underexplored.

This study aims to fill these gaps in the research base. It focuses exclusively on CMOs to elucidate their distinct political and racialized behaviors. It also focuses on the relational and political practices CMOs employ to engage disparate stakeholders in their sustainability practices. Furthermore, it methodologically extends the scholarship on CMO and charter politics by deploying observational, interview, and document-based data to understand how these organizations operate politically and racially at the local level. It does so through an interdisciplinary framework that synthesizes the central tenets of urban regime theory with sociological understandings of race and racial formation, which I describe in the next chapter.

Chapter 3: Conceptual Framework

Scholars investigating CMOs have quantitatively demonstrated the sector's impact on communities of color, yet their approaches fail to capture how race influences and circumscribes their daily efforts to sustain their organizations. Furthermore, the subset of researchers who do examine how race intersects with CMO behaviors have provided broad assessments of CMO politics or described how these efforts interact with other policies aiming to restructure urban spaces. With these foci, critical CMO practices remain underexamined. Specifically, the manner in which race informs and shapes the strategies CMOs employ to politically and relationally engage stakeholders on the ground level is less understood. Given these limitations, I employ an interdisciplinary framework that addresses these conceptual and empirical gaps in the field. I synthesize political concepts from urban regime theory with sociological understandings of race and racial formation to capture the comprehensive array of racial politics that undergird CMO behaviors. In doing so, I also examine discourse and its role in conveying racialized ideas in efforts to secure supporting coalitions. The following chapter describes the framework's components and suggests that this theory synthesis exposes the complexity of racial dynamics in CMOs' relational politics and engagement approaches.

Urban Regime Theory

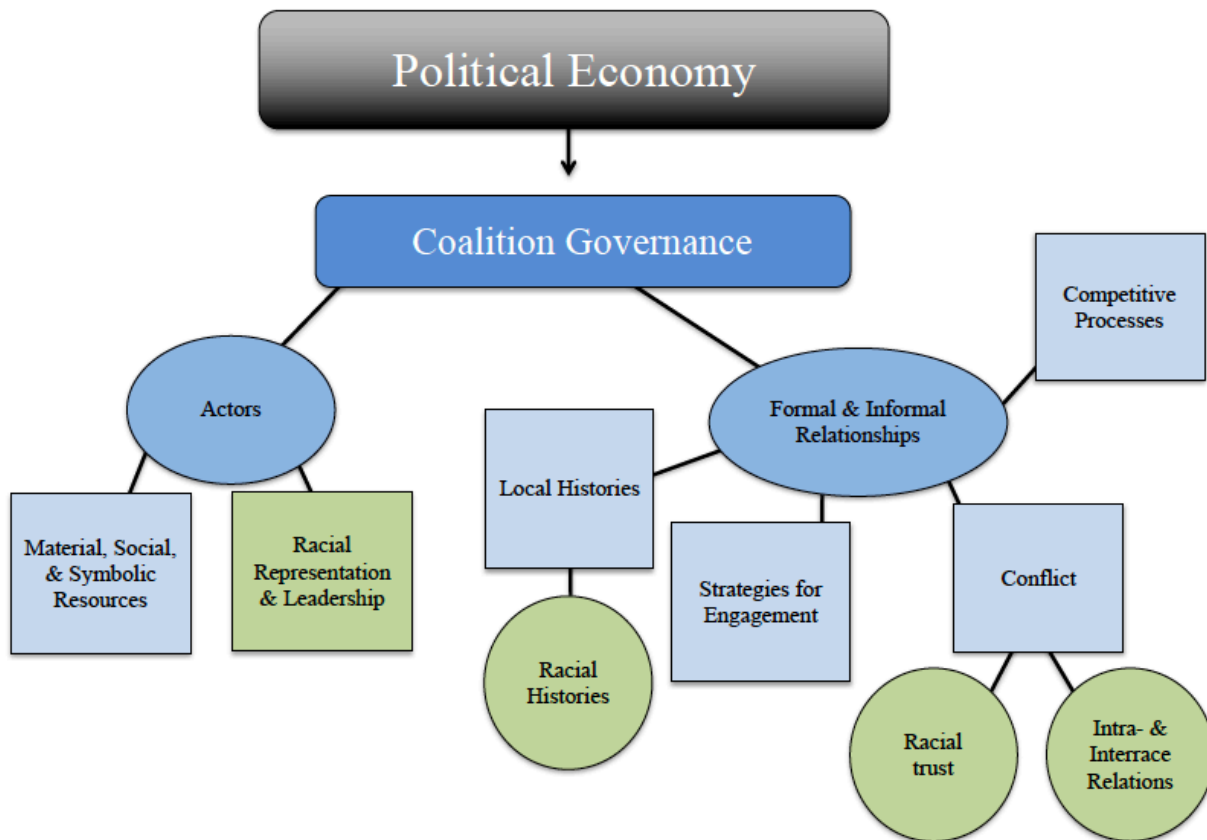
Over the past century, scholars have expanded our understanding of what politics are and what constitutes a political sphere by utilizing diverse political frameworks in their investigations. Early on, political studies emphasized macrolevel politics and sought to answer the seminal question, "Who governs?" (Dahl, 2005). For instance, researchers exposed a seemingly democratic shift in U.S. politics, demonstrating how politics had shifted from an arena driven by federalist elites in the 1800s to a pluralist "system dominated by many different sets of leaders, each having access to a different combination of political resources" (Dahl & Rae, 2005, p. 86). In this pluralistic tradition, researchers focused on the state and its constitutionally guaranteed practices. Through quantitative methods, scholars considered how new leaders affected the voting behaviors of an increasingly heterogeneous populace through the mobilization of resources to obtain power and influence (Stone, 2008a).

Over time, scholars in political science began to question the explanatory power of macrolevel and electoral politics in understanding the realities of urban politics. They also questioned the centrality of government officials in political efforts as they observed how social and economic shifts facilitated the inclusion of various constituencies in political processes at the local level. In one departure from early disciplinary tradition, researchers reconceptualized politics from a concept that emphasized voting and preference aggregation to one of preference formation wherein both governmental and nongovernmental actors mobilized their resources to influence other citizens (Mossberger, 2009; Stone, 2008a). Through this lens, scholars emphasized the role of relationships, exposed how power was enacted in daily exchanges, and elucidated the volatility of urban governance (Stone, 2008a). In doing so, these scholars pushed the discipline to expand its understanding of who engages in political behaviors, where politics occur, and how to methodologically examine political phenomena.

This dissertation is partially guided by one such political framework, which emphasizes the relational dynamics that affect how reforms are enacted, implemented, and sustained. Specifically, I use the central tenets of *urban regime theory*—a framework that illuminates local

political processes and coalition-building efforts within urban centers. This theory maintains a keen analytical eye to the formal and informal interactions surrounding governance and the strategies leaders employ to secure and sustain coalitions among a diverse set of actors. Figure 1 provides a visual model of urban regime theory. In the following sections, I provide an overview of its theoretical tenets and describe how researchers have examined race in regime analyses.

Figure 1. Coalition Governance and Relational Dynamics in Urban Regime Theory



Connecting Politics and the Economy

Urban regime theorists posit that city politics are fundamentally shaped by the relationship between the popularly controlled government and the private control of key resources (Elkin, 1985; Stone, 1989). In developing this framework in his investigation of Atlanta’s redevelopment projects, Stone (1989) observed that the government was “constrained by the need to promote investment activity in an economic arena dominated by private ownership” (p. 7). To overcome this barrier, government officials actively sought to secure resources and cooperation from the city’s business sector to sustain action. At the same time, Stone found that Atlanta’s racially and economically diverse constituents were also actors whose cooperation was necessary to the enactment of redevelopment projects, revealing how government leaders had to politically engage an array of stakeholders to enable their initiatives. By showing how local leaders attend to various actors in their efforts, regime theorists advance a *political economic* approach to investigating local politics that differs from traditional political frameworks that view the political and economic spheres as independent (Stone, 2008a). Regime

theorists blur would-be distinctions between the spheres and envision politics as a two-way relationship between the state (i.e., public officials, local constituencies) and the market (i.e., private ownership, business). In foregrounding political economy, scholars investigate how shifting economic orders require local officials to engage with the private and public sector in enacting city policies.

This political economic approach to investigating local politics is particularly relevant to a study of education in urban sectors. Over the past four decades, neoliberalism has been the driving ideology behind economic, political, and social policies, yielding significant shifts in the political economy of cities and their school systems. Characterized by the advancement of market values alongside the strategic dismantling of the welfarist policies, this ideological force has resulted in the institutionalization of policies that promote accountability and privatization, minimize educational costs, and increase school choice (Ross, 2006; Scott, 2011). The proliferation of CMOs—the focus of this study—is another byproduct of this movement. As market-oriented reformers successfully advocate for the transfer of school governance to CMOs, it is critical to investigate how leaders in these decentralized contexts secure support from stakeholders amid the challenges created by the neoliberal environment.

Coalition Governance

Because regime scholars assume that politics and the economy are interconnected, they suggest that local politics should be analyzed through the lens of *coalition governance*. They argue that political and civic mobilization is no longer the sole purview of government officials and institutions (Stone, 2008a). Instead, they show how leaders must secure informal yet relatively stable arrangements with various actors to facilitate the formal workings of public agencies (Stone, 1989). Through his research, Stone (2008a) generated a typology of these arrangements or “regimes,” noting the degree of cross-sector coordination required to generate change. For example, Stone described “development regimes,” which are the arrangements necessary to change urban land usage to promote reinvestment. In this case, the policy aims necessitated the participation of private investors, urban developers, and legal authorities, yet it also required that public officials engage and incentivize local communities that were targeted for reinvestment to quell opposition. A more challenging regime to maintain is what Stone called a “lower-class opportunity expansion regime.” This reform agenda, which includes initiatives related to job creation, transportation improvements, and education, required leaders to secure support from a wider array of actors, who may hold conflicting views and priorities. In these instances, leaders had to maintain the delicate balance of requiring the private sector to alter their practices while generating and sustaining public involvement and support for the cause.

In analyzing Stone’s original typology, Shipps (2003) adapted his concepts and described a typology of the regimes that were required to enact and sustain education reforms, including pedagogical or performance improvements and governance alterations. Of particular relevance to this study is her description of “entrepreneurial market regimes,” which are the coalitions necessary to restructure schooling in the image of the marketplace to facilitate school choice. In this context, Shipps argued that leaders must secure and mobilize support from business elites, their political allies, and local parents who were willing to enroll their children in start-up schools, like charters. She noted that parents and families most susceptible to entrepreneurial market arguments were working-class communities of color, who had been historically underserved by traditional public schools. While securing support from these stakeholders, leaders acting within this regime also sought to quell opposition from community members and

education groups (e.g., unions, district officials) to enable the institutionalization of their policies.

Overall, regime theorists expose how leaders and public officials require the cooperation of governmental and nongovernmental actors to enact reform and highlight how leaders maintain these coalitions across institutional sectors and actors (Stone, 2008a). In conceptualizing governance in this way, the notion of power is also redefined. The theory proposes a movement away from conceptualizing power in the Weberian sense as something that involves the imposition of an actor's ideas and agenda onto others. Instead, regime theorists assert a dispersed notion of power, which emphasizes the "power to" accomplish a particular reform through collaboration among disparate actors (Stone, 2006). As Stone (2006) argues, "[T]his is not a matter of a dominant actor lessening resistance to domination by manipulating the consciousness of the subordinate actor. Instead it is a matter of some connections or shared capacities to act, overriding others and altering the intention of actors in the process" (p. 27). Within education regimes, leaders actively engage, convince, and mobilize disparate actors to utilize their collective power to sustain a reform platform and curb political opposition. Furthermore, the stakeholders themselves are not passive participants but rather active agents who must exhibit "a significant degree of loyalty to the effort to see it realized" (Stone, 1998, p. 263).

Actors

Conceptualizing governance in this way enables an analysis of coalition and noncoalition *actors*. At a basic level, this framework asks who is a member of the governing coalition and who is left out. As theorized in the aforementioned typologies, the reform agenda itself often dictates the primary and secondary actors who are necessary to the enactment and implementation of the initiative. For instance, in an entrepreneurial market regime, parents, business elites, and political allies are essential coalition members in sustaining a school choice environment. Conversely, in performance regimes, or policies intended to change schools' pedagogical and cultural practices, coalitions must be composed of designated school officials, teachers, and parents. In each instance, there are noncoalition actors who pose challenges to the reform's institutionalization and must be strategically considered in policy efforts.

Participation or marginalization in coalition governance is also dependent on the resources needed to sustain a given policy. In her research on reform waves in Chicago, Shippo (2003) described how the resources required for educational initiatives dictated the stakeholders who were mobilized or neglected in governance processes. For instance, with performance regimes, Shippo noted that education-related expertise, teacher and parent commitment, public and private funding, and political legitimacy were necessary resources that coalitions needed in their efforts. In entrepreneurial market regimes, reforms could only be sustained when coalitions secured market sector approval, financing, a deregulated policy context, political legitimacy, and public support. Actors who could provide one or more of these resources to coalitions were typically identified as key coalition members. Thus, the composition of a coalition depends on how essential actors' *material, social, and symbolic resources* are to the coalition and its goals. As Shippo (2003) theorized, these assets include material resources like financial investment and social resources like political or community connections. They also include symbolic benefits, including those generated by individuals who hold a particular status or provide a level of credibility to reform efforts. In this study, I employ regime theory's notion of coalition governance to identify the actors involved in CMO efforts and the social, economic, and symbolic assets they bring to bear on CMO legitimacy and sustainability.

Informal and Formal Relationships

This framework also facilitates an examination of the *informal and formal relationships* that surround policy efforts. To govern by coalition, leaders must commit to fostering a wide array of relationships (Stone, 1989). Some of these relationships are formal, meaning they are contractually or politically codified. In the case of CMOs, these formal relationships include those maintained with school board members, district officials, and the charter authorizing body. Alternatively, informal relationships are those that are not institutionally required but are nonetheless necessary in facilitating cooperation and reform success (Stone, 1989). For CMOs, this includes relationships with community groups, prospective parents and teachers, and funders. In highlighting formal and informal relationships, regime theory captures the relational processes surrounding the facilitation of cooperation and the *strategies for engagement* that are used to secure it. Regime theory's attention to relational processes also elucidates instances of *conflict* that arise amid coalition governance. In sustaining reform coalitions, leaders can be confronted with changes in the sociopolitical environment, the influx and outflow of supporters and opponents, or decreasing levels of commitment from their supporters (Stone, 1989). When faced with these challenges, leaders also deploy strategies for engagement to address conflict and maintain coalition support.

An emphasis on relationships also exposes the *competitive processes* that affect reform. Because coalitions are composed of diverse stakeholders, there is rarely consensus over reform priorities or its core values despite their convergence in support of the particular cause (Mossberger & Stoker, 2001). Leaders have finite capacity to attend to the multiple priorities stakeholders maintain. In the case of CMOs, funders and political allies may emphasize growing the organization or “going to scale” while families and communities prioritize school quality and nurturing a community-responsive school culture. While the goals may be advanced simultaneously, the distribution of resources among stakeholders affects the degree to which coalition members exert influence in coalitions. Coalition members bring a variety of resources to policy efforts, but these resources can be unequally valued by leaders given their priorities and constraints. For CMOs, limited access to public funds and facilities makes the resources secured from political elites and the business sector critical to organizational survival, enabling them to wield significant power (Bulkley, 2007; Shipps, 2003; Stone, 1989, 2008b). Thus, it is critical to examine how leaders attend to organizational priorities while grappling with the resource differences stakeholders provide.

Competitive, relational processes also surface as one considers the competition among groups operating within a local marketplace. In the case of CMOs, several organizations operate within a local entrepreneurial market regime. Each engages in its own coalition-building efforts to secure its position while also advancing the goals of the broader agenda—to provide increased choice to students and families. Because they operate in the same environment and seek the same pool of finite resources, they compete for facilities and funding opportunities and recruit families from generally the same geographical areas. Thus, even though CMOs are members of the broader coalition advancing charter schools, their organizational efforts are segmented and can affect the broader initiative. For example, regime analyses in education have suggested that reform sustainability is negatively affected when there is a large degree of independent scattered reform activity because it counteracts the development of community synergy (Stone, 2008b). Thus, in this study, I examine the competitive politics that arise among and between CMOs as they vie to maintain their niche in the marketplace.

Regime theory's emphasis on relational politics also sheds light on the impact of *local histories* on coalition relationships. As Shipps (2003) explains, regime theory:

[A]ssumes that every city has a historically contingent set of institutional structures, resource inequalities, group interests, and political alliances that explain variations in the broader patterns of economic, cultural, and social forces at work in the region, the nation, and the international context. Such local variations account for differences in the ways that reform is manifested. (p. 842)

In analyzing coalition governance, regime theorists must understand the local historical context as it helps to explain the unique relational politics arising in reform efforts. It exposes the city's social, political, and economic characteristics while delineating how alliances and conflict have evolved against its backdrop (Stone, 1989). For instance, in cities like Chicago, education reform has historically been driven by business leaders because of local traditions and institutional structures that privilege their resources and expertise, often leaving the voices and interests of other constituents outside of governing coalitions (Shipps, 2003). In other cities like Philadelphia and Newark, state politicians have directly intervened in local reforms, generating conflict with local leaders and directly affecting how reformers engage in coalition-building efforts (Bulkley, 2007; Burns, 2003). In other instances, local characteristics have enabled greater influence of community groups in driving reform efforts (Portz, Stein, & Jones, 1999).

Providing a rich description of local histories also helps explain stakeholders' willingness to engage in governing coalitions. For example, in one study of coalition-building efforts around an urban district reform, researchers found that individuals' experiences with previous policy waves informed their decision to support or oppose the city's unprecedented community-based reform regardless of their value alignment with its equity-oriented, democratic character (Trujillo et al., 2014). Specifically, stakeholders who were traditionally underserved by the city's varied reform history expressed deep mistrust of the district's ability to enact or sustain its vision. Overall, in examining the local context, regime theorists consider how class, race, and neighborhood affiliation intersect with relational politics. They examine patterns of intra- and intergroup trust and how they facilitate or impede reform efforts. In this study, I consider how local histories interact with CMOs' engagement patterns.

In emphasizing the formal and informal relationships that surround coalitions, regime theorists suggest that relation-building practices are affected by multiple dynamics, including local histories, competitive processes, and previous conflicts. Developing and enacting strategies to engage stakeholders while contending with these factors presents a challenge for leaders, especially when advancing equity-oriented reforms. For the CMOs in my study, this challenging political process was eased or confounded by an additional element—the organization's legitimacy. Organizational theorists define legitimacy as the “generalized perception or assumption that the actions of an entity are desirable, proper, or appropriate within some socially constructed system of norms, values, beliefs, and definitions” (Suchman, 1995, p. 574). Researchers posit that leaders act strategically to foster organizational legitimacy because it provides them with resources, public trust, and stability (Ashforth & Gibbs, 1990; Dowling & Pfeffer, 1975; Pfeffer & Salancik, 1978). Traditional organizational theorists refer to these behaviors as “legitimacy management,” or the “wide range of meaning-laden actions and nonverbal displays” (Suchman, 1995, p. 586) that are strategically deployed for different audiences to overcome challenges. Suchman (1995) argued that organizations engage in three

forms of legitimacy management—*gaining legitimacy*, *repairing legitimacy*, and *maintaining legitimacy*. Suchman (1995) suggested that those gaining legitimacy were organizations entering or expanding their presence in a particular sector. In their efforts to increase their statuses, they conformed to pre-existing norms or engaged audiences that were amenable to their organization. Organizations seeking to repair legitimacy typically did so in response to a critical incident that generated a loss of public trust. To rebuild their reputation, leaders engaged in restructuring, dissociation, the creation of accountability mechanisms, and the generation of new narratives to re-establish connections with key audiences. Finally, Suchman described well-established organizations as those maintaining legitimacy and detailed the challenges they face. While noting how efforts were typically enacted with greater ease, he suggested that established organizations actively addressed issues related to the maintenance of heterogeneous coalitions, the rigidity of their organizational model, and the development of opposition groups. Birchwood CMOs ranged in their legitimacy status, which in turn influenced the strategies of engagement they deployed to gain, maintain, or repair their brand reputations.

Because organizations like CMOs compete for resources within a given environment, legitimacy can be challenging to establish and maintain (DiMaggio & Powell, 1983). In deciding what entities to support, stakeholders evaluate organizations to assess the consequences they may accrue in supporting it and the moral and normative import the organization reflects (Suchman, 1995). In this process, stakeholders consider an organization's history, established record, and reputation in their decisions. In the case of Birchwood CMO, key stakeholders, including funders, families, and policymakers, interpret and evaluate the strategically deployed legitimation tactics CMOs utilize and often select among the various organizations. Because of Birchwood's saturated charter environment, CMO positioning in the marketplace served as an additional factor that undergirded the already challenging process of coalition building.⁵

Racial Politics of Coalition Governance

As scholars investigate the coalition-building efforts surrounding education reforms, some regime theorists explicitly interrogate the role of race as a “confounding factor” in coalition governance (Henig et al., 2001, p. 7). Regime scholars who examine race do so with an analytic eye to how racial groups and their interests have been included and advanced. For example, Stone's (2008b) comparative case study of civic mobilization around various education reforms described the role of local, *racial histories* in coalition governance. In one of his focal cases, he described the Black community's long struggle to obtain leadership and opportunities in Atlanta schools and suggested that this racial history made the Black community reluctant to align with predominantly white business elites, ultimately giving way to weak reform outcomes and coalition instability. Henig et al. (2001) also illustrate the importance of race in coalition building in their comparative study of cities with Black mayoral leadership. While theorizing that *minority leadership* holds important symbolic and relational capital in coalitions, they found that Black leadership did not always lead to more civic mobilization or the inclusion of marginalized racial groups in coalitions. They noted, “In each city, racial factors have made long-term collaboration on school reform more difficult . . . obviously, tradition makes it difficult to develop and sustain relationships” (Henig et al., 2001, p. 291). In this way, they suggest that

⁵ Organizational legitimacy is the criterion upon which I compare and contrast three embedded CMOs in my study. While political and sociological concepts drive this investigation of the racial politics surrounding CMO sustainability efforts, this study is also an examination of organizational behavior, making the utilization of this concept from organizational theory applicable and relevant.

racial tension and distrust may inhibit community outreach and prevent the development and maintenance of multiracial coalitions. Orr (1996) extends this argument in his examination of intragroup relations among Baltimore's Black community amid the city's effort to allow a for-profit organization to operate local schools. He demonstrated how intragroup relations promoted solidarity and power for marginalized racial groups while simultaneously encouraging "norms of exclusion and intergroup conflict" (p. 10). Collectively, these analyses explore the impact of local racial histories and minority representation in coalition-building efforts, noting if or how racial group interests are advanced and how *intra- and intergroup relations* operate. In this study, I use these concepts to explore how local, racial politics complicate CMO efforts to sustain their organizations.

Summary

The composition of governing coalitions and their surrounding interpersonal and racial dynamics shape reform priorities and determine the degree to which the reform can be successfully maintained. Over the years, researchers have considered the composition of these coalitions in the context of large-scale education policy, highlighting the influence and conflict among disparate actors and the challenges posed in maintaining progressive equity-oriented coalitions (Bulkley, 2007; Henig et al., 2001; Mossberger, 2009; Orr, 1996; Shipps, 2003, 2012; Stone, 2008b). This body of work has helped to expand thinking in the politics of education beyond instrumentalist visions of implementation and evaluation to more complex interactions between and within networks and racial groups. In this study, I utilize regime theory's concept of coalition governance to examine the actors who CMOs engaged, the relational dynamics that arose in maintaining their support, and the differing degrees of influence groups had. I also consider the role of race by examining the impact of local racial histories, racial group representation, and intra- and intergroup racial dynamics that surrounded CMO efforts.

Race and Racial Formation

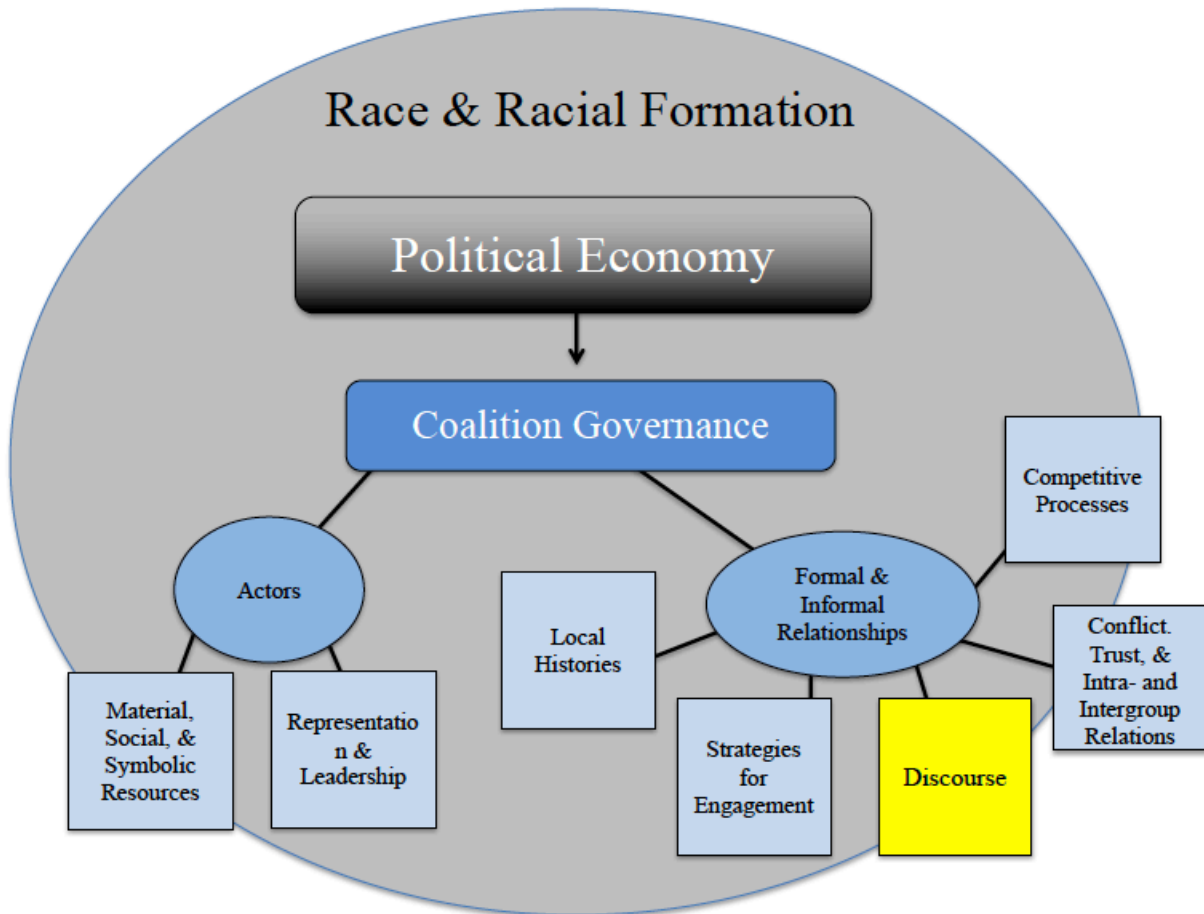
While regime theorists shed light on the complex interactions between and within networks and racial groups, their approaches have some limitations, particularly in regard to race. These limitations stem from regime theorists' tendency to neglect the manner in which race remains a central organizing principle in our society (Omi & Winant, 1994) and in turn, continuously affects coalition governance and relations. To address this limitation, I synthesize regime concepts with tenets derived from sociological understandings of race and racial formation to draw attention to the lesser examined racial dynamics that affect coalition processes. Figure 2 is a conceptual model of this theory synthesis.

Race as Central Organizing Structure

In assuming a political, economic approach, regime scholars investigate how these two interconnected systems necessitate the formation of coalitions to advance policy. While this emphasis generates important insights, regime scholars have undertheorized another foundational system that undergirds economic and political action: race. Edwards (1996) argued that political frameworks, including regime theory, are "in need of revision to reflect the centrality of race and to understand race as an irreducible social phenomenon with distinctive power dynamics" (p.1). In expanding upon Edwards' argument, Horan (2002) explained how scholars examining racial politics have focused on "the behaviors or attitudes of racially identified political actors without paying sufficient attention to the structures, informal practices, and political discourses that make

race a power relationship” (p. 20). As evidence, she pointed to the tendency of regime scholars to neglect how racial structures impede marginalized racial groups from acquiring key resources that would enable entrance and power within coalitions. She argued that regime theorists must conceptualize race as a constraint on the entire political process rather than explicating how politics and coalition governance affect racial actors and the advancement of their interests.

Figure 2. Centering Race in Urban Regime Analysis: A Theory Synthesis



These critiques of urban regime theory suggest that while some regime scholars do expose the racial dynamics surrounding reforms, they do so in a manner that does not theoretically or holistically account for the varied ways in which race works in U.S. society. To address this limitation, I synthesize regime concepts with sociological understandings of race and racial formation (Omi & Winant, 1994) to more comprehensively grasp how race operates in coalition-building efforts. In this theory of race, race is defined as a social construction, or one “resulting from human interaction and [the] amalgamation of societal forces, giving rise to racial groups and [their] constant reification in social thought” (Haney López, 1994, pp. 27–28). While being a social construction, race has material consequences. Social, political, and economic structures have historically and continually affected the resources racial groups amass and the influence they exert (Mills, 1999; Omi & Winant, 1994). For example, researchers have demonstrated how the current racial hierarchy resulted from whites’ coercive accumulation and

systemic maintenance of resources, which have generated negative ramifications for communities of color to this day (Bernal, 2002; Cox, 2000; Ladson-Billings & Tate, 1995; Mills, 1999; Omi & Winant, 1994; Parker & Lynn, 2002; Tate, 1997). Moreover, the socialization of citizens into racialized roles and identities has supplemented this resource accumulation and dispossession (Appiah, 2000; Mills, 1999), making race a form of ““common sense”—a way of comprehending, explaining, and acting in the world” (Omi & Winant, 2009, p. 4). Overall, race fundamentally shapes societal structures and individuals’ way of knowing and thinking. Because of its impact on the public and the personal, one can understand race as a “central axis of social relations which cannot be subsumed under or reduced to some broader category or conception” (Brayboy et al., 2007, p. 3).

Because race remains a central organizing principle in our society, this sociological approach suggests that race continuously affects all aspects of coalition governance. First, racialized sociopolitical and economic structures affect the resources racial groups accumulate and in turn, the demographic composition of coalitions. Because of systemic marginalization, communities of color have amassed less wealth and secured fewer professional and political positions, which are typically leveraged by leaders in reform efforts. In regards to CMOs, the effects of this historical and ongoing subjugation are visible in the overrepresentation of whites among its donor base (Scott, 2008) and the underrepresentation of people of color on charter boards, charter authorizing bodies, and other elected positions. At the same time, evolving social dynamics have shifted the symbolic resources that various racial groups bring. With the emphasis on equity in education and public discourse in the post-*Brown* and civil rights era, people of color are frequently the face of education reform efforts. As Scott (2011) explains, parents, policymakers, and advocates of color are frequently leaders and spokespeople for initiatives like charter schools, and their perspectives are foregrounded in widely circulated documentaries and advocacy materials as reformers advocate for the restructuring of the public school system. Because market reforms are typically enacted in urban communities of color, showcasing the voices of marginalized racial groups adds legitimacy to their effort by suggesting that the community or professionals of color support the reform. Thus, along with others whose support provides credibility to a movement, the inclusion of people of color in reform coalitions can be understood as having symbolic benefits. Overall, as organizations like CMOs foster alliances, they evaluate the material, social, and symbolic benefits that coalition members bring in relation to their organizational priorities and their surrounding context. In understanding race as inextricably tied to these coalition elements, I analyze stakeholder resources and coalition representation with an eye to how broader racial structures shaped these characteristics.

Interactions and Race

Sociological understandings of race and racial formation also assert that race is continuously acted upon, negotiated, and reconstructed in social exchanges (Haney López, 1994; Omi & Winant, 1994). Because of its omnipresence in social interactions, this theory synthesis suggests that race fundamentally shapes the formal and informal relationships that surround coalition governance. On one level, the structural forces that affect resource attainment influence the competitive processes within coalitions. The resources that racial groups bring and leaders’ evaluations of these assets are necessarily informed by racialized structures that characterize U.S. society. In addition to race’s centrality to competitive processes, understanding race as a central axis of coalition governance also suggests that intra- and intergroup race relations are quintessential characteristics of relationships and local histories, serving at times as the sources

of conflict, trust, and distrust. While some scholars have highlighted these racialized dynamics in their regime analyses (Henig et al., 2001; Orr, 1996; Stone, 2008b; Trujillo et al., 2014), their studies typically lack an explicit theory of race, making race a fringe or marginal factor that confounds coalition politics. In elucidating race's central role, this interdisciplinary approach moves race from a concept that is peripherally examined to one that is centrally engaged and more comprehensively understood. In this study, I examine each element of coalition governance with regard to the broader racial structures and patterns that influenced it.

Understandings of race and racial groups are also revealed in strategies of engagement as individuals recruit different racial groups onto their coalitions or quell potential conflicts along the way. In engaging various groups, leaders enact approaches and craft messages around their target populations to legitimate their reforms and affect audiences' orientations to the work (Schneider & Ingram, 1993). In one study employing regime theory, Henig et al. (2001) explored this phenomenon by examining how Black mayors in four cities utilized explicit racial agendas in promoting education reforms. In their findings, they suggested that Black leaders were reluctant to foreground racial issues when engaging members of the private sector because many white, economic elites were fearful of being thrust into racial conflicts or being "cast as white colonists" (p. 246). In addition, while leaders invoked race when engaging local communities, Black leaders who sought to sustain multiracial alliances tended to frame their battles in terms of class rather than race, affecting their ability to garner support from marginalized communities of color. Overall, this study suggests that leaders strategically deploy or forego racial frames when engaging racial groups, thus conforming to different race-based expectations depending on their target audience. This strategic foregrounding or minimization of race in coalition-building efforts has implications for the form of legitimacy leaders advance. This evidence suggests that leaders seek to legitimate their efforts in ways that go beyond the race and power-neutral definition of legitimacy that was previously stated (Lawrence, 2008; Nkomo, 1992). Instead, we can understand leaders as actively managing their racial legitimacy, or the perception that their actions are desirable, proper, or appropriate within the socially constructed norms, values, and beliefs of racialized power structures. This form of legitimacy suggests that organizations and their personnel build coalitions by using engagement strategies that conform to social norms regarding race in addition to other organizational norms and expectations.

While providing insights into the strategic use of race in coalition efforts, regime scholarship has rarely considered the content of these racial frames. While they have called attention to how racial issues are variably featured in reform efforts, they have not thoroughly considered how messages convey understandings of racial groups to mobilize constituents. Because the strategies CMOs deploy to engage stakeholders are shaped by and necessarily expose understandings of racial groups, I examine the degree to which race and racial issues are foregrounded in CMO efforts and the racial subtexts of the messages and strategies themselves.

Racial Discourse

Discourse is instrumental in conveying racialized ideas, thus providing an important data source to understand the often-subtle ways that understandings of racial groups are conveyed through messaging (Bonilla-Silva, 2006). At a fundamental level, race and racial structures involve discourse, or the manner in which language, texts, and imagery create social understandings of race and racial hierarchy (Jiwani & Richardson, 2011, p. 242). Race and racialized identities are largely formulated by texts and language. They are learned, acquired, and legitimated in discourse and representation practices (Hall, 1997; van Dijk, 2002). In this way,

discourse involves symbolic power— or “the power to mark, assign, and classify” (Hall, 1997, p. 259). For instance, researchers have delineated how the onset of European colonialism and the exploitation of the “Third World” necessitated the fabrication of race and racial hierarchy, which was partially accomplished by the circulation of depictions of racial groups as innately inferior to inform the public imaginary (Hall, 1997; Mills, 1999; Omi & Winant, 1994). Even today, researchers present evidence of how this practice is maintained in recent political and social discourse (Haney López, 2014; Lipsitz, 1995). While many have mobilized to reverse harmful racial narratives, the exercise of symbolic power in portraying racial groups nonetheless remains a powerful constraint on social and discursive patterns. Racial discourse remains a powerful ideological tool that informs policy formation and implementation and “ultimately, the public imagination of what is deemed ‘effective’ or ‘good’ policy, and what counts as ‘fair’ or ‘just’ in the distribution of educational resources” (Dumas et al., 2016, p. 4).⁶ In investigating CMOs, I consider how race is discursively conveyed in CMO efforts to analyze how it reified, deviated, or adapted common sense understandings of racial groups and in turn, contributed to or mitigated the reification of racial hierarchy and its material consequences (Crichlow, 2013).

The impact of colorblindness. Race relations are influenced by broader ideologies that affect how race is discussed and how groups interact. Since the Civil Rights era, researchers have elucidated a paradoxical pattern in regards to race and racism in the U.S. Specifically, researchers have noted the decreasing number of whites subscribing to overtly stereotypical views of racial groups (Schuman, 1997) alongside the maintenance of racial disparities in numerous aspects of life (Massey, 2008). While Schuman and other researchers suggest that the normative trend reflects a positive transition in America’s racial psyche, others are more skeptical, suggesting that racism have taken on forms while continuing to stratify. For instance, Kinder and Sears (1981) characterized this shift as the rise of “symbolic racism,” or the confluence of racist ideas and the American Protestant ethic that allow for racist ideas to be masked with arguments based on virtue, individualism, and hard work. Others have suggested that white prejudice stems from a desire to maintain one’s social and economic position. Most notably, Bobo, Kluegel, and Smith (1997) characterized this as “laissez-faire racism,” or the tendency to utilize cultural inferiority arguments to explain the poor economic standing of Blacks and other nondominant groups. While helpful in distilling racism’s new form, these frameworks emphasize individual or psychological dispositions to explain racism. That is, while both symbolic and laissez-faire racism explain how racism is related to broader socioeconomic shifts, racist acts are nonetheless manifested and enacted at the individual level.

Alternatively, researchers have defined and popularized the term “colorblindness,” which asserts the systemic nature of racism while still attending to the manner in which individuals reproduce it (Bonilla-Silva, 2003; Haney López, 1996, 2014; Omi & Winant, 1994; powell & Roediger, 2012; Wells, 2014). This dominant racial ideology constrains understandings of racial dynamics, interactions among racial groups, and racial discourse. It does so by eschewing direct references to race, theoretically extending equal opportunity to all racial groups, and emphasizing the meritocratic ideal in explaining inequity. While researchers have documented how proponents of the colorblind perspective defend its merits as progressive and representative

⁶ While a discursive analysis of race and racism is integral given its role in producing racial understandings, this is not to say that race and racism can be reduced to a language or communication problem. Race operates structurally and generates material and detrimental ramifications for nondominant groups. Thus, an examination of racial discourse can call attention how discourse reproduces systematic racial advantages and disadvantages that are codified in societal structures (van Dijk, 1993a).

of the post-racial state (Haney López, 1996; powell, 2012), this racial outlook nonetheless assumes an ahistorical framework that obscures continued patterns of institutionalized racism, thus serving to naturalize racial patterns of inequity. Colorblindness also serves as a way to deflect responsibility or discomfort when one considers one's own racial positioning. As Brayboy et al. (2007) argue, "colorblindness can be a defense mechanism used by those in power because of the direct connection between race relations (historical, present, and future) and conflict and shame" (p. 175). With a colorblind stance, individuals can deny that they hold negative racial ideas by avoiding explicit racial language, asserting that race is no longer salient, and identifying racism in overt discriminatory acts. With these assertions, individuals maintain a positive self-concept even as they espouse deficit-laden narratives and cultural arguments of racial difference in a de-racialized manner (van Dijk, 2002).

Colorblindness & its discursive frames. Racial ideologies like colorblindness are composed of frames that help individuals make sense of race relations and existing racial inequities (Omi & Winant, 2009). These frames serve as ways of understanding, predicting, and explaining the causes and solutions to personal and social problems occurring along racial lines (Lewis, 2004, p. 632). For the purposes of this study, I draw upon research that delineates the linguistic devices and rhetorical themes of colorblindness to examine the racial discourse CMOs employ in coalition building. While many have investigated the linguistic mechanics of colorblindness (Leonardo, 2004; Lewis, 2004; Schofield, 1986), the discursive devices identified by Eduardo Bonilla-Silva and Tuen A. van Dijk guide this analysis.

Bonilla-Silva's discursive framework. Bonilla-Silva (2002, 2006) investigated the manner in which colorblindness, or *color-blind racism* as he terms it, manifested itself discursively. On one level, Bonilla-Silva described its central frames, or the ideas and narratives that are circulated about marginalized racial groups amid colorblind language. He argued that colorblindness minimizes the significance of racial discrimination in the current context by alluding to improved conditions. He also suggested that this discourse emphasized the concepts of equal opportunity and choice to rationalize opposition to approaches that can mitigate *de facto* racial inequity (Bonilla-Silva, 2003). In doing so, those espousing colorblindness 'extend' egalitarian values to marginalized racial groups, and any challenge or inability for individuals of color to achieve success is rooted in their cultural or individual deficiency, not in 'egalitarian,' race-neutral societal institutions (Bonilla-Silva, 2003).

In addition to its central frames, Bonilla-Silva identified the stylistic components of colorblind language, delineating the microlevel linguistic devices whites used in a series of interviews to safely express their prejudicial views. These devices included an avoidance of direct racial language (i.e., code language) when speaking about people of color and the increased presence of verbal incoherence when communicating ideas that could be perceived as racial. Moreover, he noted the semantic moves that whites made to safely express racial views, using claims of ignorance or phrases like "I'm not racist, but..." to save face amid comments that advanced negative racial subtexts. Finally, he noted the role of projection, or the placement of racial motivations unto individual racists or homophobic tendencies among communities of color. This discursive move included statements that pointed to other whites as harboring racist sentiments or blamed African Americans for perpetuating segregation.

Bonilla-Silva (2006) also suggested that those espousing colorblindness crafted racialized stories to solidify their viewpoints. Through his study, he suggested that interviewees built upon commonly held justifications for the racial status quo in their narratives, which he defined as "socially shared tales that are fable-like and incorporate a common scheme and wording"

(p.124). To illustrate, he demonstrated how many of his participants sought to minimize the presence of current discriminatory practices by presenting anecdotes that emphasized the theme of “The past is the past” (p. 125). Through this narrative, interviewees suggested that U.S. citizens must put the past behind them and avoid race-based policies like affirmative action which keeps racial tension alive. Another commonly espoused storyline in his study was what he called, “I didn’t own slaves” (p. 127). Here, Bonilla-Silva suggested that individuals articulated this storyline to distance themselves from the enduring effects of institutional racism to oppose redistributive policies. Overall, these racial stories worked in conjunction with colorblind frames and linguistic devices to minimize race’s salience in the U.S. context and reify negative characterizations of marginalized racial groups.

Van Dijk’s discursive framework. While Bonilla-Silva’s framework provides a strong overarching categorization of colorblind discursive tactics, his work focuses on how individuals communicate racial constructions in conversation-based, interview settings. Given that this study draws upon interview, observational, and documentary data, I supplement Bonilla-Silva’s categorization with van Dijk’s extensive research into the linguistic devices used to verbally and textually express racial views.⁷ Van Dijk’s approach more specifically names linguistic and nonverbal moves, which add specificity to Bonilla-Silva’s framework. To illustrate, when analyzing discourse, van Dijk (2002) complements Bonilla-Silva’s discussion of verbal incoherence by naming hesitations and filler language as linguistic devices that accomplish this unintelligibility. He also calls attention to local semantics and syntax, which details the ways that speakers avoid direct racial language through distancing moves. For instance, van Dijk identified euphemisms and pronouns as discursive tools that “other” nondominant groups and the selective use of active and passive voice when articulating racialized comments.

Van Dijk’s canon of work also showed how racial discourse operates in various genres. He analyzed different forums (e.g., media, news reports, advertisements, speeches, day-to-day conversations) and described how each maintained differing structures that influenced the semiotic and linguistic devices utilized in its discourse (van Dijk, 1993a, 1998, 2000). For instance, he identified the surface structures (e.g., visual positioning, pictures, bolded phrases) in news media texts that subtly *indexed* (van Dijk, 1997) or signaled race in the context of their commentary. He also exposed the syntactic moves (e.g., passive voice, agentless sentences) employed in political speeches and public documents when describing negative occurrences associated with communities of color (van Dijk, 1993a, 2000).⁸ In these analyses, van Dijk also examined the content that is most associated with instances of explicit racial messaging, demonstrating that topics that reproduce dominant stereotypes (e.g., crime, immigration, deviance) were most frequently mentioned (van Dijk, Ting-Toomey, Smitherman, & Troutman, 1997). Through this work, van Dijk builds upon Bonilla-Silva’s framework by naming the varied moves used to express racial views in forums that involve more strategic messaging.

While identifying microlevel discursive moves across various communication genres, van Dijk also argued that researchers should interpret discourse based on the overall argumentation presented in a given text. In an overview of the research on media, textual, and political

⁷ While he does not use the term colorblind to name the sociopolitical context, van Dijk (1992) alludes to many features of the colorblind context, including the tendency of individuals to deny the ongoing existence of racism and speaker’s efforts to save face amid racialized comments. In this way, his framework complements Bonilla-Silva’s.

⁸ Media discourse surrounding police violence is one case in point. Media reports often include phrases like “officer-involved shooting” or “shots were fired” to describe incidents of violence against Black and Latino individuals, which obscure the actors responsible for negative events and leave the cause of harm indeterminate.

discourse, van Dijk et al. (1997) explained that analyzing texts holistically can demonstrate how actors craft polished texts that maintain positive self-characterization while simultaneously derogating racial groups. They argued that analyzing the racial arch of the presented discourse reveals the strategically deployed stories about marginalized racial groups that can only be captured in analysis of the text's overall argumentation (van Dijk et al., 1997). Like Bonilla-Silva, van Dijk identifies the critical role of storytelling in conveying racialized notions.

Table 1. Bonilla-Silva and van Dijk's Racial Discourse Devices: A Framework

Bonilla-Silva (2002, 2006)	van Dijk (1997, 2000, 2002)
Avoidance of direct racial language	<ul style="list-style-type: none"> • Euphemisms (<i>e.g., urban, income-related descriptors, at-risk, underserved</i>) • Use of pronouns (<i>to signal Other</i>) • Imagery (<i>invoking racial images</i>) • Surrounding content in rare instances of explicit references
Semantic Moves	<ul style="list-style-type: none"> • Disclaimers <ul style="list-style-type: none"> ◦ <i>Empathy: Of course, refugees have had problems, but ...</i> ◦ <i>Ignorance: I don't know, but ...</i> • Passive vs. active voice (<i>de-emphasizing agency with racially charged statements</i>) • Nominalization (<i>use of noun phrases that make sentences lack agency</i>)
Role of projection	<ul style="list-style-type: none"> • Disclaimer: (<i>e.g., Transfer: "I don't mind, but my clients..."</i>) • Passive vs. active voice (<i>de-emphasizing agency with racially charged statements</i>) • Nominalization (<i>use of noun phrases that make sentences lack agency [e.g. the harassment experienced by protestors]</i>)
Incoherence	<ul style="list-style-type: none"> • Hesitations/false starts/errors • Filler language • Textual or verbal incoherence (<i>e.g., mixed messages; unclear statements</i>)
Racial Stories	<ul style="list-style-type: none"> • Instances of storytelling • Overall argumentation (<i>story arch that conveys a racialized message</i>)

Overall, colorblindness constrains how individuals and organizations discuss race. The dominance of colorblindness suggests that references to race and the characterization of racial groups will be subtle and disguised by race-neutral language. The synthesis of Bonilla-Silva and van Dijk's discursive devices exposes the nuanced manner in which colorblind racial discourse is conveyed in various textual forms. In this study, I use these devices to uncover how race is acknowledged and articulated by CMOs in their coalition-building efforts. I analyze the degree to which CMOs embraced colorblind discourse and how their discursive moves maintain positive organizational-presentation and/or derogate the racial groups. Table 1 provides an overview of

the structural and linguistic elements described by van Dijk and how they extend Bonilla-Silva's constructs.⁹

Conclusion

By synthesizing urban regime theory with sociological understandings of race and racial formation, this study captures a broad array of political and racial dynamics in CMO coalition-building efforts. Urban regime theory enables an investigation of the actors, relationships, competitive processes, and engagement strategies that characterize CMO efforts. It also facilitates a racialized examination of the composition of CMO coalitions, stakeholders' interest advancement, and evolving inter- and intragroup relations. In applying sociological understandings of race and racial formation, my analysis acknowledges how race structures coalition composition, resource differentials, interactions between racial groups, and the racialized messages conveyed. Overall, this conceptualization facilitates a comprehensive examination of racial politics and shifts the idea of race from a static notion that could be measured by the presence or interest advancement of marginalized racial groups to a dynamic one that acknowledges how race operates and evolves in relational microlevel dynamics.

This conceptual approach to investigating CMOs addresses critical gaps in the research base regarding these growing actors in public education sphere. Beyond drawing more attention to these underexamined entities and how they operate at the local level, this framework enables an investigation of the relational and discursive strategies CMOs employ to engage disparate economic, social, and racial groups to consider how relationships may advance or impede equity within charter school reform. In foregrounding racialized discourse and racial structures, this study maintains race as a central axis of analysis, which pushes against the often-colorblind tendency of the politics of education field. It also advances the research base on charter schools and studies of their political behaviors by theoretically and methodologically capturing the dynamic ways race is invoked and acted upon in reform efforts. In the next chapter, I describe how I operationalize these concepts in my qualitative research design.

⁹ In their work, Bonilla-Silva and van Dijk describe a variety of discursive devices that one can use when analyzing text-based or verbal race discourse. The constructs described in this chapter and presented in this table are the structural tools that are relevant to this particular study.

Chapter 4: Qualitative Research Design and Methodology

Through quantitative approaches, researchers have demonstrated the impact of CMOs on communities of color by delineating the racialized patterns of the sector's growth, competitive effects, and academic achievement. At this same time, these statistical analyses fail to ascertain how race influences and surrounds the daily practices of CMO leaders as they manage their organizations. Scholars have begun to examine these racialized processes through qualitative means. They have examined interviews, observations, and documents to investigate CMO political behaviors, but in doing so, have advanced broad assessments that are limited in the degree to which they capture the microlevel racial politics that surround CMO sustainability efforts. Furthermore, the manner in which racialized messages are deployed in political processes remains an underexamined component of political analyses. In this study, I use a qualitative embedded case study approach to capture the multifaceted way that race intersects with CMO political efforts on the ground level.

This study examined the material, relational, and discursive strategies CMOs employed to secure support for or quell resistance to their organizations amid a unique political, educational, and racial context. It asks four primary, interconnected research questions. The subsidiary questions represent some of the ideas I explored in data collection and analysis to answer the overarching questions.

- 1. How do racial politics interact with CMO efforts to sustain their organizational position in the local CMO marketplace?**
 - a. How have racial politics and racial discourse surrounded educational reform efforts in the post-*Brown* era?
 - b. How do actors describe the political, economic, racial, and/or educational landscape of the locale (historically and currently)?
 - c. How, if at all, have these local dynamics affected CMOs' ability to establish their organizational presence and to secure a coalition of supporters?
- 2. How do CMO leaders engage and recruit various stakeholders to support their organizations?**
 - a. Who is identified as key actors in CMO governing coalitions? Who is excluded?
 - b. What material, relational, and discursive strategies do CMOs use to 'bring them' into their coalitions?
 - c. How, if at all, do approaches, interactions, or materials differ as they engage with different coalition members?
- 3. How do competitive pressures in the marketplace affect CMO coalition-building practices?**
 - a. What are the priorities and interests of CMO personnel and their coalition members?
 - b. How do material, social, or symbolic resources affect the interests that are advanced in CMO efforts?
- 4. How are race and racial groups' interests considered and addressed throughout the process?**
 - a. How, if at all, has race been an issue in CMO sustainability efforts?
 - b. How does race affect coalition composition and the relational processes of coalition governance?
 - c. What messages (e.g., race-based or other) are invoked in CMO strategies?

Data sources for this study included 57 semi-structured interviews, 573 organizational documents, and approximately 60 hours of observations, which were analyzed via deductive and inductive coding (Miles & Huberman, 1994), document analysis (Bowen, 2009), and Critical Discourse Analysis (van Dijk, 1993b). This dissertation built upon a larger, two-year study in which I worked as the lead Graduate Student Researcher with Principal Investigators Drs. Tina Trujillo, Na'ilah Suad Nasir, and John A. Powell. That study explored the enactment and implementation of a districtwide community schools initiative that aimed to address structural race-based inequities through "targeted universal" strategies (Powell, 2008).

In this chapter, I describe the study's qualitative research design. With its embedded case study approach, I define the case, the embedded units identified for in-depth analysis, and the criteria upon which these units were selected. I also specify data collection procedures, noting the interview, observational, and documentary data sources I amassed, before turning to a discussion of my analytical approaches. The chapter concludes with a discussion of the contributions and limitations of this methodological approach. Before explaining the study's design, I also discuss my own positionality to situate myself as a researcher in the study.

The Self in the Research

LeCompte and Schensul (2010) argue that in interpretive research there is no "conceptual separation between the influence of the researcher and the people or events under study" (p. 42). Part of carrying out a rigorous study, therefore, requires me to consider how my positionality and epistemological worldview informs my approach and interpretations of the research.

My Positionality and Epistemological Orientation

A central motivation behind my professional and intellectual pursuits has been the advancement of educational opportunity for communities of color. This commitment arose from my undergraduate study of political science, where I learned of the complex connections between politics, education, and opportunities for marginalized groups. At the time, these emerging understandings helped me make sense of my own experiences as a Latina growing up in a middle-class household in Orange County, a historically conservative area of California. As a child, both of my parents had advanced degrees, and thus, were able to maintain stable income. I had access to good schools and lived in stable communities. Yet, I typically was the only person of color in the social and academic spaces I inhabited. In a sense, my life was characterized by intersecting privilege and marginalization. On one hand, I reaped privileges from sociopolitical forces that had shaped my own experiences, including the favorable immigration status awarded to my family as Cuban refugees and our fair skin that enabled us to "pass" in many instances. Conversely, I understood the alienation that derives from not seeing oneself reflected in the community around her. I also experienced the pain resulting from innumerable microaggressions and the frequent public derogation for speaking Spanish in public, particularly in Pete Wilson's California of the 1990s. My consciousness regarding systemic privilege and marginalization opened my eyes to the political, economic, and social forces that shaped my own experiences and those of nondominant communities. Because of this understanding, I maintain a keen sensitivity to race and power relations and their manifestations in daily life.

Given my experiences and worldview, I characterize my research orientation as one that is both critical and interpretivist. In maintaining a critical eye, I examine how power structures "exert direct and indirect domination over the political, economic, social, and cultural expression of citizens" (LeCompte & Schensul, 2010, p. 45). I attend to how macrolevel processes manifest themselves in meso- and microlevel interactions. Thus, my interpretation of patterns among

organizational documents, stakeholder engagements, and interviews in this study is informed by my recognition of racialized power structures and how those are relationally and discursively reflected in the data. As a critical theorist, I also believe that research should be used in ways that are intended to bring about transformative social change (LeCompte & Schensul, 2010).

I am also an interpretivist, or a researcher that seeks to uncover “what people know and believe to be true about the world” (LeCompte & Schensul, 2010, p. 48). Guba and Lincoln (1994) assert that interpretivist researchers aim to understand their participants’ voices and beliefs rather than impart ideas and analyses onto their research subjects. Therefore, I am cautious not to inadvertently convey my own analytic voice onto my participants and am sensitive to the potential incongruence between my worldview and theirs. In practice, this means that I seek to understand what my participants believe and how they make sense of their experiences rather than try to explain their experiences for them.

My Professional Experiences and my Scholarship

My professional experiences as an educator motivate my intellectual curiosities. Before entering the doctoral program, I worked as a classroom educator for nine years in New York City and Los Angeles, teaching in both traditional public and charter school settings. During this time, I developed insights into the inner-workings of urban schools and the daily politics of improving students’ academic trajectories. For instance, during my five years at a traditional public school in New York City, I witnessed the school-level politics surrounding the adoption of new pedagogical approaches. These dynamics revealed entrenched beliefs about minority students’ academic ability and behavioral dispositions and ultimately impeded the adoption of a progressive instructional approach that could enrich students’ learning opportunities.

Yet, it was my time as a teacher and department head in a prominent CMO that deeply influences the questions driving this research. I accepted a position as a teacher at Knowledge Is Power Program (KIPP) because I was attracted to its espoused commitment to advancing educational equity for marginalized youth. I witnessed various racial and political dynamics, however, that seemed to undermine its outward equity orientation. For example, the CMO’s “No Excuses” approach to student performance and discipline generally meant that CMO staff, school leaders, and teachers rarely engaged in deep discussions of how power structures related to race, gender, or class affected our students’ daily lives. This is because a “no excuses” philosophy focuses solely on an individual’s agency and emphasizes behavioral conformity and rote practices in the name of academic achievement. This, in turn, often led to the prescription of misguided, counterproductive, or culturally unresponsive school and classroom level practices.

My experience also exposed how KIPP practices often had racial subtexts, including the harsh disciplining of Black students who were deemed noncompliant or the frequent recitations of “beating-the-odds” narratives for funders or other school visitors. These practices and narratives seemed to touch upon negative understandings of racial groups and how this educational setting amended that trajectory. The CMO also engaged in racialized marketing practices where teachers and principals of color were often prominently showcased in their materials. During my tenure there, my image was utilized in marketing materials and was even displayed on the organizational website as the face of “Teach at KIPP” for a two-year period. Taken collectively, my experiences as an educator led me to inquire about how politics and understandings about race and racial groups can shape equity-oriented reforms.

Methodology

To understand CMO coalition-building efforts, I employed a case study design. Case studies enable researchers to investigate a real-life phenomenon *within* its current context,

allowing researchers to gain a holistic understanding of the phenomenon and its interplay with a complex social environment (Yin, 2013). This design is also best suited to studying phenomena that require an analysis of multiple sources of data and when the researcher has little or no control over what is studied (Yin, 2013). With its sensitivity to context and its ability to capture a multitude of processes, case studies are also the preferred method for regime theorists who explore sociopolitical and economic dynamics within urban areas (Mossberger & Stoker, 2001).

More specifically, this research follows an *embedded case study design* (Yin, 2013). An embedded case study explores a single unit of a given phenomenon coupled with an in-depth analysis of nested subunits that provides additional insights and description. In this dissertation, I analyzed a population of 10 CMOs operating in one urban sector—the case—as well as three CMOs—the embedded subunits of analysis—to more extensively detail the strategic and racialized behaviors these organizations display. This approach yields significant advantages when compared to holistic single case studies. An analysis of embedded subunits within a single case counteracts the abstraction that is often generated when analyzing a case holistically (Yin, 2013). In addition, analyzing nested cases allows researchers to explore similarities, differences, and patterns within and across embedded cases, providing more opportunity to corroborate evidence and illuminate specific case dynamics (Baxter & Jack, 2008; Yin, 2013).

This methodological approach enhances the empirical research on CMO politics. In advancing broad assessments of the policy networks bolstering CMO growth or CMO efforts in the context of city-wide restructuring, researchers have rarely investigated how a population of CMOs operating in an urban area engages in political behaviors to sustain their organizations. While my holistic assessment of CMO efforts provides an empirical contribution, my analysis of three CMO subunits also elucidates key differences among these heterogeneous organizations that can explain the distribution of patterns in the overall CMO population. Because I was unable to obtain full access to CMOs for comparative study, the embedded case analysis provided a way to elucidate critical differences and similarities among these institutions outside the scope of organizational access.

Case Selection and Description

This case study is both descriptive (Yin, 2013) and instrumental (Stake, 1995). In presenting a descriptive case, I aimed to delineate the politics surrounding CMO reform and the material, relational, and discursive strategies that a population of CMOs utilized as its leaders navigated the local competitive CMO marketplace and the evolving racial and political context. At the same time, this embedded case study described the microlevel manifestations of CMO racial politics in one region, which refines the political theory base on urban regimes, which is incompletely conceptualized in regards to race as I argued in the last chapter. In this way, this study is an instrumental case study (Stake, 1995) in that its findings offer theoretical insights into racial politics that can be examined in other contexts.

With its descriptive and instrumental purposes, I conducted research in Birchwood, California¹⁰ because it was an exemplar case (Patton, 2001) that could generate descriptive and theoretical insights into CMO racial politics. In the sections below, I describe the exemplary dimensions of Birchwood that made it an ideal setting. I also describe the CMO population and the sampling techniques I utilized to select embedded subunits for deeper analysis.

¹⁰ I use pseudonyms for the city and the CMOs operating within its boundaries to maintain the confidentiality of the study's participants.

Birchwood: Its Distinctive Racial and Educational Politics

The CMO population investigated in this study operated schools in Birchwood, a mid-size, racially diverse urban area in California with a rich history of political activism and racial politics around a variety of social issues including education. As the citizens of Birchwood experienced many of the socioeconomic shifts characteristic of urban areas during the post-WWII era (e.g., white flight, suburbanization, deindustrialization), many of its most marginalized citizens organized to combat the urban decline they were experiencing, making the city a central hub of the Civil Rights Movement. This community and race-based activism has continued to characterize Birchwood in the past decades as citizens remain actively engaged in grassroots efforts to advance remedies to the detrimental effects on the new political economy, which have been felt sharply along racial lines. For instance, Birchwood residents have engaged in local campaigns that have created systems to include more citizen-based policy-making and successfully lobbied for economic reforms to increase employment for local residents and to restructure land-use policy. The city has also remained actively engaged in national protests including those related to the Occupy Movement and the recent instances of police brutality.

Birchwood's robust local and racial politics have occurred within a diverse city context. While the city's population is composed of an array of racial, ethnic, and linguistic groups and reflects a degree of demographic balance, Birchwood remains a racially and economically segregated city. The city's tree-lined, sparsely populated hills are composed of more affluent and white families in comparison to the concentration of low-income communities of color in the city's densely populated flatlands.

Birchwood schools. The concentration of Birchwood's most marginalized groups has generated challenges for district officials and reformers who have worked to improve the educational outcomes for Birchwood's low-income, minority communities. Over the past four decades, district officials have enacted reforms intended to counteract persistent inequities in school quality, including at times, reforms that attended to the pervasive effects of poverty and structural racism. For instance, like other urban districts across the country, district officials launched personalized and autonomous "small schools" throughout the city in the early 2000s—an effort that was initially mobilized by an alliance of religious and community leaders that was heavily supported by large philanthropic foundations. District officials also instituted central office restructuring, site-based school management, and the implementation of full-service community schools across the district. Birchwood schools have also been the target of punitive state and federal sanctions for fiscal insolvency and disproportionate suspension and expulsion rates of marginalized youth.

Birchwood reformers have frequently advocated for increased school autonomy and local control to increase community responsiveness and improve educational outcomes. While this advocacy undergirded the city's small schools movement in the early 2000s, it also bolstered the proliferation of charter schools in the region. Since the opening of the first charter school in the early 1990s, the number of charters in Birchwood has increased annually. As of 2015-2016 school year, Birchwood charters operated over 40 schools and served approximately 25 percent of the city's school-aged youth. Many point to the almost decade-long period under state sanctions for fiscal insolvency as a large driver in the growth of charter schools in the region. Because charter school enrollment grew exponentially during that prolonged period, some argued that state officials were more interested in advancing and securing a choice environment than addressing fiscal insolvency. These growing numbers along with the presence of strong philanthropic support for charters in the area have led many to characterize Birchwood as a "choice-friendly environment" (Wohlstetter & Zeelandelaar, 2015). Furthermore, the proliferation of charter schools in Birchwood has been accompanied by efforts to secure the

sector’s sustainability. These efforts include litigation that would enable access to facilities and public funding.

The political and advocacy efforts underway to secure resources for Birchwood charters have not gone unchallenged as parent groups and community based organizations actively voice their opposition to the seemingly charter-friendly stance the city and the district have assumed. While these opponents have advanced arguments related to the outflow of resources from district schools in the wake of charter proliferation, they most often refer to the sector’s enrollment practices that have concentrated students with the highest needs (e.g., English Learners) in the city’s public schools. (See Table 2 for enrollment data.) In their argumentation, opponents also point to the disproportionately high number of Latino students in comparison to the district and city populations and disproportionately lower numbers of African Americans. For opponents, these statistics suggest that charters selectively engage particular racial groups.

*Table 2. Demographic Profile of Birchwood, its charters, and its district-run schools.**

	Charter-Run Schools	District-Run Schools	Birchwood [^]
African American	20%	30%	25%
Asian	10%	10%	20%
Latino	55%	40%	25%
White	5%	10%	25%
Other	10%	5%	5%
Low-Income	80%	75%	30%
Special Needs Students	10%	10%	-
English Learners	25%	30%	-

*Demographic percentages where rounded to maintain confidentiality.

Case significance. As a city, Birchwood is characterized by many of the critical dimensions that are conceptually investigated in this study. It has a storied history of community activism to mitigate broader sociopolitical shifts that have been acutely felt along racial lines in the city limits. These community-based political efforts, which continue today, are frequently motivated by the need to advance racial equity and thus provide descriptive and theoretical insights into the racial and political dynamics explored in this study. In addition to the city’s racial politics, Birchwood has a charter-rich educational context that has prompted many to engage in political efforts to oppose or bolster the sector and to confront the racial dynamics undergirding charter growth. In this way, Birchwood represents an exemplary case of the intersection between charter and CMO reform, race, and local politics.

Birchwood’s CMO Population

Within this complex city and educational ecology are Birchwood CMOs, who operate the market share (i.e., 60 percent) of the city’s charter schools. In total, there are 10 CMOs operating schools in Birchwood. Table 3 contains a description of each of the organizations. Each organization has been given an alphanumeric name that represents its organizational legitimacy status, which is the criterion upon which the embedded case analysis is based. Labeling all of the CMOs in this manner reveals how legitimacy status intersects with the engagement and racialized patterns displayed by the entire CMO population. In the following sections, I discuss patterns related to CMO size and growth, enrollment trends, and programmatic designs.

Table 3. Birchwood’s CMOs: General Description

		CMOs Repairing Legitimacy (RL)			CMOs Gaining Legitimacy (GL)					CMOs Maintaining Legitimacy (ML)		Averages
		RL1	RL2	RL3	GL1	GL2	GL3	GL4	GL5	M1	M2	
Number of Schools	Birchwood	3	3	2	6	3	2	1	1	7	1	2.9
	Others in CA	0	3	0	0	0	0	2	2	28	10	4.5
	National Presence	No	No	No	No	No	No	No	No	Yes	Yes	-
Student Demographics (%)*	FRL	77	89	54	95	86	91	67	97	91	71	82
	AA	18	5	57	10	10	94	40	8	21	62	33
	L	13	44	25	82	83	4	49	87	74	23	48
	A	58	48	4	3	3	0	2	0	1	3	12
	W	3	2	11	1	2	0	3	0	0	3	3
	O	8	2	12	5	3	2	6	5	4	9	6
	ELL	22	25	1	58	45	6	12	28	37	10	24
Grades Served		K-12	6-12	K-12	K-8	K-12	K-1, 5-6	9-12	9-12	K-12	K-8	-

*Enrollment Abbreviation Key: FRL= Free & Reduced Lunch; AA=African American; L=Latino; A=Asian; W=White; O=Other; ELL=English Language Learner

Network size and growth approaches. As a whole, the CMO population is composed of small or medium-sized charter networks¹¹ that exclusively operate schools in Birchwood and/or its surrounding cities. Six of the 10 organizations (e.g., RL1, RL2, RL3, GL2, GL2, GL3) were founded in Birchwood, and five of these organizations continue to exclusively operate schools within the city boundaries. Only two of the organizations (ML1, ML2) maintain a national presence and operate schools in multiple states or across the various regions of California. Even so, these national organizations maintain home offices in Birchwood.

The size of Birchwood CMOs suggests that these organizations have engaged in tempered expansion efforts in Birchwood to date. While the 10 Birchwood-based CMOs operate the market share of charters, few have enacted an aggressive growth plan based upon predetermined strategic objectives within the city limits (Farrell et al., 2013). Even the two CMOs with national reputes have engaged in slow or minimal growth in the region over the last fifteen years while expanding the number of schools they operate in surrounding municipalities and other regions. Instead, the organizations appear to have engaged in organic or opportunistic growth approaches, resulting from community and stakeholder demand and the availability of resources (e.g., facilities, school leadership, funding) essential for scaling up the number of schools (Farrell et al., 2013). This orientation to growth has resulted in a slow increase of CMO-operated schools. Yet, it is important to note that data in this study suggests that CMOs are actively engaging in conversations about impact. In an effort to increase their local and national brand recognition, several CMOs are generating strategic plans and discussing the creation of new school sites. In addition, three of the ten CMOs are developing or expanding branches of their organization that would allow them to share their pedagogical approaches via professional development opportunities to extend their organizational impact.

CMO demographic composition. The CMO population is characterized by demographic patterns similar to those present in the city's broader charter school sector. (See Table 2 for overall charter school demographics.) CMOs disproportionately serve students who qualify for free and reduced lunch (82 percent) when compared to the local school district. CMO-operated schools are also disproportionately composed of students of color when compared to Birchwood schools and the broader city population. Yet, a close examination of CMO student populations also reveals that CMOs follow suit in serving larger numbers of Latino students when compared to other racial groups. In addition, with the exception of GL3, ML2, RL3, and GL4, the majority of CMOs disproportionately underserve African-American students when compared to the local population and school district enrollment. Two-thirds of CMO-operated schools are located in neighborhoods where a significant number of Latinos and African Americans reside, yet CMO school enrollment does not reflect neighborhood demographic balance. Furthermore, only one CMO school (ML2) was located in the flatland region of the city that has historically been characterized by an African-American majority.

CMO programming. All Birchwood CMOs espouse a commitment to enacting a quality educational experience that enables students to enter and persist through college and career. While sharing this core focus, the CMOs programmatically approach this effort in distinct ways. For example, two CMOs (e.g., R1, R2) emphasize high expectations and the importance of a strict academic environment in their efforts to support students on this journey. Others employ more holistic, student-centered approaches, including an emphasis on experiential learning

¹¹ Small-sized charter networks are defined as CMOs that operate three or fewer schools. Medium-sized networks are those managing between four and nine schools, and large CMOs are those operating 10 or more schools. (Miron & Gulosino, 2013)

(GL2), performance assessments (GL4), blended learning (ML1, GL1, GL3, GL5), and arts education (RL3). One CMO (ML2) combines a strict and rigorous academic environment with socioemotional supports and restorative practices in their programmatic approach.

Several Birchwood CMOs align their college and career focus with an emphasis on community transformation. Of the 10 CMOs, five organizations emphasize college and academic success as a foundation for empowering their students to be community leaders that address critical issues facing Birchwood and its residents. To illustrate, GL1 and GL3 include references to change and transformation in their organizational names while GL2, ML2 and GL5 make references to community transformation and leadership in their mission statements. For these organizations, references to transformation, social justice, and community are consistently mentioned alongside descriptions of their college preparatory academic programming.

Embedded Case Analysis

Within this CMO population, I used *continuum* (Patton, 2001) sampling to identify three embedded cases for in-depth examination. Through this sampling approach, researchers identify and utilize a relevant theoretical concept that distinguishes people, organizations, or communities along a particular criterion and compares cases along this dimension of interest (Patton, 2001). In this research project, the concept of *legitimacy* emerged as a key criterion upon which the CMOs differed, which in turn influenced their efforts to establish or maintain support among a variety of stakeholders. While the concept was not originally included in this study's framework, it emerged organically from patterns in my data through iterative data collection and analysis processes (Miles & Huberman, 1994).

Legitimacy refers to the perception that CMOs act in ways that are desirable or appropriate within a socially constructed system of norms, values, and beliefs. CMOs have differing levels of legitimacy and in turn, enact strategies to manage it to sustain their organizations (Suchman, 1995). Suchman (1995) identified three forms of legitimacy management—repairing legitimacy, gaining legitimacy, and maintaining legitimacy—which affect the actions CMOs enact to overcome external challenges. While many organizational theorists analyze legitimation behaviors within power-neutral socially constructed systems (Lawrence, 2008; Nkomo, 1992), this concept is interpreted through the critical sociological framework that guides this research, exposing how CMOs can perform proper or desirable behaviors that conform to racialized systems of power. To gain, repair, or maintain legitimacy, CMOs enact strategies that conform to social norms on race and racial discourse to legitimate their organizations and secure support from various stakeholders.

In selecting embedded cases, I identified CMOs that varied in their approach to legitimacy management. Legitimacy management styles were determined after the initial phase of data analysis. Data sources used to categorize CMOs included webpages, interviews, charter petition hearings, and charter school board meetings. Early analyses yielded thick descriptions of organizational histories, public perceptions of CMOs, and organizational priorities, which I triangulated to identify the CMOs that exemplified each approach. Those identified as CMOs repairing legitimacy were those who experienced one or more critical incidents that generated a loss of public trust and disrepute. CMOs gaining legitimacy were either recent entrants into the Birchwood charter landscape or those seeking to build their established reputation by expanding their local and national impact. CMOs seeking to maintain their legitimacy were those who displayed a strong state or national presence and a well-established brand and reputation.

After determining each CMO's legitimacy status, I selected RL1, GL2, and ML1 for in-

depth analysis. Each CMO exemplifies its respective form of legitimacy. RL1 is a long-standing Birchwood CMO that is known for its strict school environments and strong academic results. At the same time, the organization's history is controversial, and its leaders are actively working to rebuild stakeholder trust and formulate a new organizational brand. GL2 is also a well-established Birchwood CMO, yet unlike RL1, GL2 maintains a strong reputation within the city limits. To build upon their success, GL2 leaders are seeking to expand the CMO's local and national brand by expanding the number of schools it operates and growing its professional development model. ML1 is one of the largest CMOs in the country, operating over 30 schools in multiple states. With its established track record, ML1 maintains a recognizable and reputable brand, which has enabled it to become one of the larger charter operators in Birchwood. Through the data collection efforts I describe below, I was able to amass evidence on these organizations to investigate their coalition-building efforts in detail. (More specific descriptions of each of the nested cases are presented in Chapter 8.)

Data Collection and Analysis

Data sources for this dissertation included interviews, organizational documents, and observations. Table 4 below provides a comprehensive overview of the data sources and the corresponding analytical approaches that were used to answer each of the overarching research questions. I triangulated my data using multiple sources of evidence and analytic techniques, thereby increasing the internal validity of my research findings.

Data Sources

Interviews. I conducted two waves of interviews over the data collection period. For consistency across interview phases, I developed semi-structured protocols based on Patton's (1990) framework, using a combination of informal, open-ended prompts along with more formulated questions. Pilot research, previous studies, and theory informed the development these protocols. (See Appendix A for the interview protocols for each interview phase.)

Interview phase 1. The first set of interviews investigated the intersection of Birchwood's history, local politics, and educational reform waves (research question 1). Building from interviews ($n=26$) amassed during the multiyear study of the city's political and racial landscape and its impact on educational reform coalitions, I conducted 12 additional interviews with individuals who were positioned differently within Birchwood's educational landscape, including those identified as charter advocates (e.g., philanthropies, community organizations, advocacy groups) and opponents (e.g., district office personnel, union officials) in the literature (Vergari, 2007). Using insights and prompts from the interview protocols developed in the larger two-year study, these semi-structured interviews attended to the respondent's experiences in the city and its educational landscape and their perspectives on the politics surrounding educational reforms, including the proliferation of charter networks. Participants in this interview phase were identified via snowball strategy as a means of securing information-rich sources (Miles & Huberman, 1994). Interviews were approximately 60-90 minutes in length and were audio-recorded for transcription.

Table 4. Data Collection & Analysis Matrix

Research Questions	Data Sources	Where or From Whom Data will be Collected	Data Analysis Approaches	Analytical Concepts to be Applied
1. How do racial politics interact with CMO efforts to sustain their organizational position in the local CMO marketplace?	38 interviews	<i>Interviews:</i> philanthropists, community organizers, market-oriented advocates, students, district office personnel, school administrators, union officials, board members, teachers, parents, local policy makers	Deductive & Inductive Coding	<i>Descriptive codes:</i> political/ racial characteristics of Birchwood's city and educational landscape and macrolevel trends in educational politics <i>Deductive codes:</i> coalition inclusion and exclusion, racial representation in coalitions, intra- & interracial relations, power, trust
2. How do CMO leaders engage and recruit various stakeholders to support their organizations?	15 interviews Internal & external documents (n=573) Observations (60 hrs)	<i>-Interviews:</i> CMO senior leaders (e.g., CEOs, COOs), school leaders, CMO board members <i>-Internal documents:</i> strategic plans, board-meeting minutes and materials <i>-External documents:</i> webpages, social media feeds, most recent charter petitions, outreach documents, marketing materials and videos <i>-Observations:</i> charter petition hearings, CMO board meetings, community events, fundraisers	Deductive & Inductive Coding Document Analysis	<i>Descriptive codes:</i> actors engaged, CMO engagement strategies (relational, discursive, material), organizational history <i>Deductive codes:</i> coalition members, non-members, racial representation in coalitions, resources (needed by CMO and those coalition members bring)
3. How do competitive pressures in the marketplace affect CMO coalition-building practices?	31 interviews Internal & external documents (n=573) Observations (60 hrs)	<i>-Interviews</i> with CMO senior leaders and those identified as CMO coalition members: funders, parents, local policymakers, board members, community leaders, and district staff in charter departments <i>-External & internal documents and observations</i> noted above	Deductive & Inductive Coding Document Analysis	<i>Descriptive codes:</i> CMO engagement strategies (relational, discursive, material), strategy development, CMO priorities <i>Deductive codes:</i> stakeholder interests, stakeholder resources, level of engagement
4. How are race and racial group interests considered and addressed throughout the process?	57 interviews Internal & external documents (n=573) Observations (60 hrs)	<i>-Interviews</i> with CMO leaders, CMO affiliates, and various Birchwood stakeholders <i>-External & internal documents, interviews and observations</i> noted above	Deductive Coding Document Analysis Discourse analysis	<i>Deductive codes:</i> intra and intergroup mistrust/conflict; race-based resource and influence differentials <i>Critical Discourse Analysis:</i> explicit racial references, implicit racial references, racial images, characterizations (assets/deficiencies) of racial groups

* Data collection and analysis matrix adapted from models presented by LeCompte and Schensul (2010).

Interview phase 2. The second interview phase investigated two elements: 1) the strategies Birchwood charter leaders employed to build or sustain supporting coalitions and 2) general stakeholder responses to CMO efforts. During this phase, I interviewed CMO leaders (e.g., CEOs, superintendents, central office personnel) to delineate organizational histories, the strategies charter leaders employed in engaging various stakeholders, and any challenges or conflicts arising in their efforts (research questions 2 & 3). These interviews also engaged leaders in a discussion of the racial demographics of their coalition members, race-related assets or challenges among coalition members and across Birchwood, and the role of CMOs in alleviating racial inequities (research question 4). Charter leaders were purposively identified via an online search of the CMOs operating in the Birchwood district. CMO directors and personnel were contacted, and a total of 15 CMO leaders and central office personnel representing nine of the 10 CMOs were interviewed. Interviews ranged between 45-75 minutes in length and were audio-recorded for transcription purposes.

I supplemented CMO leader interviews with those related to stakeholder perceptions of the population of CMOs operating in the city. I used snowball sampling to identify and interview key coalition members, including parents, community organizations, local policymakers, district officials, and funders, who articulated a range of opinions on CMOs and charter schools ($n=16$). Interviewees were asked about their experiences working with or in opposition to various CMOs, their rationales for supporting or opposing Birchwood CMOs, the manner in which they had been engaged by CMOs, and how the local CMO sector advanced or impeded educational and race-based equity (research question 3 & 4). Interviews ranged from 45-75 minutes in length and were audio-recorded for transcription purposes.

Organizational documents. I supplemented interview data with internal and external documents, totaling 573 in number, to investigate how each CMO implemented their coalition-building efforts and the degree to which race was implicitly or explicitly addressed within the various documents. These internal and external documents allowed me to corroborate interview data and to identify instances of divergent evidence to further investigate (Bowen, 2009). Internal documents included strategic plans and board-meeting materials. External documents included marketing materials, webpages, social media feeds, promotional videos, and informational flyers that targeted a variety of audiences. The documents amassed included those produced during the 2014-2015 and 2015-2016 academic year, but some documents, including strategic plans, were written prior to the study's initiation.

Observations. Observations were my third qualitative source of data. I observed CMO board meetings, public hearings on CMO charter petitions, and other public efforts to engage stakeholders (e.g., fundraisers, community meetings), generating detailed field notes describing the events. (See Appendix B for observation guide.) Field notes were composed of handwritten, low-inference notes (Lofland, Snow, Anderson, & Lofland, 2005) taken during the events followed by reflections on the observations in the evening to capture emerging themes (Glesne, 2015). These observations, totaling 60 hours, provided an additional opportunity to observe organizational strategy development and the implementation of engagement techniques. They also provided an opportunity to directly observe the relationships and interactions among coalition members and racial groups described in interviews.

Data Analysis

Qualitative Coding. Interview data was transcribed and then coded using a hybrid coding method (Miles & Huberman, 1994). While I generated a codebook before beginning my

analysis, I refined code definition and defined boundaries through a constant-comparative method (Kolb, 2012) during the coding process. Through dialogue between the literature, conceptual framework, and the amassed data, I altered or deleted deductive codes as necessary.

Both deductive and inductive codes were applied to the interview phases to generate a “thick description” (Eisenhardt, 1989) of the political and racial dynamics surrounding CMO efforts. Descriptive codes were applied to capture Birchwood education reform waves and charter-specific issues that characterized the city landscape. Other inductively generated codes pertained to CMOs. These codes included those related to CMO characteristics (e.g., history, student composition, mission), the persuasive tactics they deployed (e.g., data, testimonial, student performance), and the non-racial messages they invoked in their efforts (e.g., college, professional learning, economy).

In addition to these inductive codes, I applied deductive codes from the study’s conceptual framework. The interviews were coded for concepts from urban regime theory, including the following: coalitions, stakeholder power/nonpower, collaborative vs. competitive relationships, engagement strategies, material/social/symbolic resources. (See Appendix C for full codebook.) The application of these deductive codes allowed me to understand coalition-building patterns and how stakeholder group interests were advanced among the city’s varied reforms waves. To investigate racial politics, I applied deductive codes from urban regime theory (e.g., intra- and interracial relations, conflict/cooperation, trust, racial representation, race/class landscape) to elucidate the racial dynamics of Birchwood’s shifting political economy and how these factors intersected with the local education landscape. I complemented this analysis by applying deductive codes related to colorblind racial discourse, which I describe in more detail in the section below on Critical Discourse Analysis.

Serving as an important source of triangulation, field notes were also analyzed using a hybrid coding method. Notes were coded with inductive and deductive codes to corroborate the CMOs’ approach to stakeholder engagement and the relational and discursive strategies the CMOs used. In addition, field notes were analyzed to triangulate coalition membership, informal and formal relationship patterns, and any instances of conflict that arose in CMOs efforts. This analysis assessed how and to what degree stakeholders were attended to in CMO efforts. Codes delineating racial dynamics (e.g., presence of racial groups, messaging used during or in discussion of coalition efforts, intra- and interracial dynamics) were also applied. (See Appendix C for full codebook.)

Document Analysis. Organizational documents were analyzed as an additional means of triangulation to identify patterns in CMO engagement strategies. As Bowen (2009) describes, “Document analysis is a systematic procedure for reviewing or evaluating documents—both printed and electronic (computer-based and Internet-transmitted) material” (p. 27). To systematically analyze the various internal and external documents, I engaged in an iterative process, which included “skimming (superficial examination), reading (thorough examination), and interpretation” (Bowen, 2009, p. 32), to generate a content and thematic analysis of the various texts. Both descriptive and deductive codes (e.g., strategies for coalition building, coalition-members) were applied to corroborate interview and observational data on CMO strategies. These documents were also inductively coded to elicit the themes and messages conveyed in CMO efforts to persuade particular groups. Both internal and external documents were also analyzed with discourse analysis techniques to consider if and how race or messages about racial groups are explicitly or implicitly invoked.

In analyzing organizational documents, I also determined each document's intended audience to investigate if and how CMO politics and engagement strategies varied along this criterion. Target audiences included teachers, parents, donors/funders, policymakers, students, and general public.¹² These audiences were determined in several ways. In most instances, CMOs named their audiences in the title of their organizational materials, social media posts, or webpage titles. In the case of charter petitions, local policymakers were assigned as the target audience since they were the primary reviewers as the local charter authorizing body. When no stakeholder was named, which typically coincided with documents that provided a basic overview of the organizations, I assigned the document the label of "general public."

Critical Discourse Analysis. Because discussions of race are typically subtle and avoided in our current context (Bonilla-Silva, 2006; van Dijk, 1993a), I employed the methods of Critical Discourse Analysis (CDA) to explore how race was discussed and if racial messaging was employed in interviews, organizational documents, and observations. CDA can be defined as an investigation of "the properties of what people say or write to accomplish social, political, or cultural acts in various local contexts as well as within broader frameworks of societal structure and culture" (van Dijk, 1997, p. 1). This analytic approach enables an examination of how microlevel discourse reproduces, challenges, or reformulates broader discourse patterns that systematically influence text or talk (van Dijk, 1997). Researchers using CDA analyze linguistic or textual features (e.g., word choice, sentence structure, semantics, or visuals) and how these features coalesce to reflect or resist broader patterns of racial thinking. Overall, CDA elucidates how individual instances of communication reify, adapt, or resist broader power structures (Fairclough, 1992).

As previously discussed, colorblindness is the dominant racial ideology through which individuals understand race. To make sense of race relations, individuals adhering to this perspective utilize particular discursive frames, including the avoidance of explicit racial language, the increasing use of euphemisms, indirect references, or coded language to refer to racial groups, and semantic moves that distance actors from racialized views (Bonilla-Silva, 2006; van Dijk, 1993, 2000). To illustrate, an analysis of external documents may demonstrate how text features, including the visual placement of ideas, pictures, and bolded phrases, can indirectly refer to racial groups without explicitly naming race in a particular document. Furthermore, the use of coded racial references is done in conjunction with the circulation of colorblind ideals, including the elevation of individual merit, the obscuring of structural inequity, and the subtle derogation of marginalized racial groups. In my analysis, I sought to delineate CMOs' linguistic and semiotic patterns and the narratives they constructed about race in their stakeholder engagement.

To analyze the racial discourse in the data sources, I used a three-step analytical process (Søreide, 2007). In the first step of data analysis, I applied a set of deductive codes described in Table 1 to capture explicit and implicit racial references. (See p. 39 for discourse features.) These codes included those related to explicit racial language (e.g., race, minorities, Latino, African American), deracialized euphemisms (e.g., urban, underserved, low-income), and the visual representation of racial groups in organizational materials and public engagements.¹³ After this

¹² No designation was made in regards to if the stakeholder was a current or prospective supporter.

¹³ In analyzing visual images, I identified someone as a racial minority based on phenotypical markers and cross-referenced this when possible with patterns in surnames and any available data. In most cases, I made these inferences based on my own knowledge and assumptions of various racial groups. While my inferences may not align with how one racially identifies himself/herself, my acculturation within the U.S. racial context makes me

initial step, I engaged in a second analysis of the coded excerpts, identifying if other discursive features operated as implicit or explicit racial cues. During this phase, I identified references to civil rights, restorative justice, culturally relevant practices, and diversification efforts as additional ways in which race was invoked in CMO engagement. The final step of analysis assessed the overall patterns and lines of argumentation related to race that were present in the data. I analyzed if or how patterns reflected, adapted, or deviated from the underlying principles of colorblindness (e.g., eschewing of racial references, extension of egalitarian values, individualization or meritocracy, cultural deficiency) and how patterns varied depending on the target audience for CMO efforts. Because an interpretative analysis of discursive patterns can generate issues related to internal validity (Jaipal-Jamani, 2014; Tonkiss, 2004), I drew my conclusions based on the convergence of evidence with the Bonilla-Silva and van Dijk's constructs and the consistency in which the ideas were conveyed.

Data matrices and findings verification. I combined holistic and cross-case analysis to synthesize findings and to elicit the characteristics of the individual cases, particularly related to the three embedded cases. Using the coded data, I created case memos for each of the 10 CMOs, which captured each organization's individual characteristics and key themes related to engagement strategies and racial politics. These memos informed the data matrices I created to examine the study's central questions related to CMO engagement patterns and racial politics.

In total, I created five data matrices to analyze the coded material. Four matrices focused on CMO engagement patterns for the primary stakeholder groups identified in this study—teachers, policymakers, parents, and funders. Each matrix was a cross-case data display (Miles & Huberman, 1994) that delineated engagement strategies, broad themes in the respective stakeholder engagement, and racial discourse features for each CMO. Once the data was organized and reduced in data cells, I noted patterns and themes in CMO engagement and verified my findings by using counts to check for representativeness (Miles & Huberman, 1994). Moreover, I identified examples of outliers and negative evidence to consider the proportion of convergent to deviating information in my findings. In drawing my conclusions, I considered something a finding if the conclusion was triangulated and more positive evidence was presented despite the presence of negative information. At the same time, I explored and presented negative data to depict the complexity of CMO political and racial processes.

The final data display was a descriptive conceptually-clustered matrix (Miles & Huberman, 1994) to identify the dynamics surrounding Birchwood reforms and their racial politics. The reform waves I explored included Birchwood's period under state sanctions, its small schools movement, charter schools, and initiatives under the current superintendent. For each reform wave, I entered data regarding the reform's central issues, coalition members, intra- and interracial dynamics, and broader city factors that intersected with the policy initiative. In drawing conclusions, I made comparisons and contrasts between the waves to generate a description of Birchwood's educational and sociopolitical landscape.

believe that I made these inferences within the broader, shared understanding of race and the phenotypical markers implicated within that social categorization. While inferential in nature, the inclusion of visual text is necessary as visual images signal that race is being invoked, particular in a colorblind context which de-emphasizes explicit references to race. In addition, the multimodal form of marketing materials, which increasingly use text and images together, requires that text and image be considered as functioning as a unified whole. Words and images no longer make sense in isolation but rather work together to communicate a message (van Leeuwen & Kress, 2011).

Strengths of Study Design

The embedded case study methodology employed in this study enabled an investigation of the complex and multifaceted racial politics that circumscribe market-based educational reform efforts. As reforms are enacted in cities with unique sociopolitical dynamics, analyzing multiple data sources to holistically and qualitatively explore these local politics provides an important complement to other research that has captured broad patterns and racialized outcomes related to charter schools and CMOs.

This study investigated process, not product. This study's qualitative case study design captured the evolving and fluid manner in which race affects relational politics and how broader conceptualizations of race are acted upon at the local and organizational level. Its use of embedded case study methodology allowed for an analysis of how these political processes unfold across a local CMO population while presenting how these findings varied depending on CMOs' legitimacy status. Furthermore, my examination of discourse provides a unique contribution as discourse has been underexamined in political processes and sheds lights on how the often-subtle invocation of race-based frames may undermine the ability to garner support. Overall, the qualitative embedded case design advances methodological contributions, particularly around how race is analyzed in political analyses.

This study also draws upon unique data sources that can enable researchers to gain insights into CMOs—a sector that has remained relatively closed to the academic research community. In addition to interviews with CMO personnel and stakeholders, this study primarily drew upon publicly available data to understand how CMOs engaged in racial politics to sustain their organizations. Charter petition hearings—both in person and recorded—and CMO board meetings are infrequently tapped public spaces wherein organizational decision making is revealed and public debate is held among a variety of stakeholders. Publicly available documents and web-based marketing materials reveal the strategic manner and messaging that CMOs employ as they seek to garner support from various stakeholders. As the public and prominent agencies increasingly demand greater transparency and responsiveness from the charter school sector (NAACP, 2016), governance spaces and publicly available data are critical sources of evidence for understanding CMO practices and their equitable and democratic implications.

Limitations of Study Design

While advancing methodological contributions, the research design has limitations. First, despite this study's contribution to theory enhancement, its case study design prevents its findings from being generalizable. The study's focus on a single population of CMOs operating in a unique sociopolitical context prevents comparison to other CMO populations in other locales. Future research should use comparative or multi-site case study approaches of CMO racial politics to elucidate similarities and differences within and across these growing actors in different geographic regions to generate stronger analytical and theoretical conclusions.

Access to CMOs also affected the study's research design. This study was originally conceptualized as a comparative case study of two Birchwood-based CMOs who engaged in different approaches to organizational growth. I engaged in efforts to gain access to the various organizations for over seven months, yet no organization was willing to participate in the study. As a result, I reconceptualized the study to be one that drew primarily from publicly available data to examine all of the CMOs operating in the city. While the use of publicly available data has methodological contributions, it is limited in providing insight into the creation of documents, marketing materials, and other engagement strategies. Charter board meetings were

the one space where decision making could be observed, but a discussion on strategic engagement and messaging depended on the meeting agenda. Furthermore, there was no access to one-on-one engagement meetings with stakeholders like policymakers and funders and minimal access to fundraisers and parent recruitment efforts, which would have required organizational permission to shadow and document the events. Overall, the inability to obtain full access to CMOs limited the gathering of evidence on stakeholder engagement practices that were beyond the scope of what was publicly shared by the organizations in documents and public governance spaces.

Chapter 5: Racial Politics and U.S. Education Reform in the Post-*Brown* Era

Many scholars have critiqued education research's inattentiveness to the role of context in shaping educational processes (Anderson & Scott, 2012; Berliner, 2002; Maxwell, 2004). While a growing number of qualitative and mixed methods studies draw connections between broader structures and school systems, the research base remains primarily composed of scholarship that insufficiently theorizes and examines how macrolevel forces influence meso- and microlevel phenomena (Anderson & Scott, 2012). Because broad political and normative factors influence the strategies they enact and affect stakeholders' willingness to support their causes, a central aim of this study is to elucidate how CMOs' coalition-building efforts intersect with racial and political climates.

This chapter focuses on delineating these contextual features at the national level. Drawing upon previous research and primary sources, I provide an historical overview that traces the racial politics surrounding four education reform waves implemented since the pivotal case of *Brown vs. Board of Education* (1954) to redress race-based inequity. I find that contentious racial politics have consistently accompanied education reform waves, yet over time, policymakers have increasingly sought to secure multiracial coalitions with competing and often incompatible racially coded appeals. While enabling a broader political support, these political and discursive strategies have not been accompanied by systemic change, thus undermining leaders' and advocates' claims that a given policy advances racial and educational equity.

Post-*Brown* Education Reform Waves: A National Perspective

Racial inequity has remained a central concern for education reformers since the *Brown* decision. While many engaged in efforts to address racial inequities in schools before the landmark case, *Brown* represented a moment in which the U.S. "erased the contradiction between the freedom and justice for all that America proclaimed, and the subordination by race permitted by our highest law" (Bell, 2005, p. 2). Despite *Brown*'s symbolism and the sense of hope it inspired, the goal of alleviating race-based educational inequities has remained elusive for policymakers and reformers. Because of the decision's unfulfilled promise, various policies have been instituted to address the inequities that have persisted.

In the following sections, I describe four waves of education reform that have been enacted to address racial disparities in the 60 years since *Brown*. These waves include desegregation, school finance reform, marketization, and school choice. While these reforms necessarily co-existed and competed with other initiatives, researchers have shown how these policies gained significant political and public attention and led to the proliferation of federal and state legislation reflecting the reform's theory of action (Moran, 2004; Superfine, 2013). For each policy, I describe the reform, the context for its development and enactment,¹⁴ and the racial politics that accompanied the reform wave to elucidate patterns at the national level.

To capture macrolevel patterns of racial politics, I reviewed primary and secondary sources to identify coalitions associated with policy waves and the manner in which racial discourse was employed in political efforts. For discursive patterns, I analyzed the discourse of prominent political figures because of its wide-reaching impact on collective understandings of race and education (Cohen-Vogel & Hunt, 2007). The evidence I amassed included the discourse

¹⁴ In describing the sociopolitical context surrounding reform waves, I draw upon Haney López's in-depth analysis (2014) of U.S. racial politics and the role of racially coded appeals in national political discourse.

employed by presidential candidates, sitting presidents and governors, secretaries of education, and other key government officials. When relevant, I also included excerpts from party platforms and policy documents to supplement my analysis. The discourse that prominent figures employ in public statements or embed within policy documents relies on persuasive strategies to make particular constructions of reality more appealing than others (Suspitsyna, 2010, citing Edwards & Nicoll, 2001). In addition, political rhetoric¹⁵ and its accompanying narratives convey the “common sense” within which a proposed reform appears as an appropriate solution to an identified problem (Ball, 2007). Thus, examining this line of discourse helps us understand how social reality is being constructed and how power is being maintained (van Dijk, 1993a).

Phase 1: Initial Desegregation Efforts Post-*Brown* (1955-1965)¹⁶

Despite the promise of racial equity signaled by the *Brown* decision, the decade that followed *Brown I* (1954) and *Brown II* (1955) was characterized by efforts to evade integration across the South. Enabled by the Court’s ambiguous call to integrate schools “with all deliberate speed” (*Brown II*) and its decision to leave the details of desegregation compliance to lower courts (Bell, 2005; Orfield & Eaton, 1997), various Southern states implemented measures that blocked integration, facilitated the exit of white families from school systems, or engaged in a superficial degree of integration to deflect charges of noncompliance (Bell, 2005; Frankenberg et al., 2010; Levin, 1999). As a result of these evasion tactics, school integration remained elusive. By 1964, only one-fiftieth of Black children attended integrated schools in the South while segregation in the North remained relatively intact (Orfield & Eaton, 1997).

As these evasive measures were enacted, opponents of school desegregation justified their resistance through rhetorical moves that enabled them to advance policies that reified racial antipathy. While some opponents did frame their resistance in overtly racist arguments that alluded to the innate inferiority of African Americans (Rountree, 2005), the more pervasive tactic was to use racially coded language, or discourse that did not explicitly mention race but triggered white anxieties around the dismantling of race relations. Labeling these rhetorical moves as “dog whistles,” Haney López (2014) described how many segregationists invoked the anti-federalist argument of “states rights” to impede school integration. He detailed how Governor George Wallace invoked this frame as he stood in front of the schoolhouse door barring the U.S. Deputy Attorney General from desegregating the University of Alabama. In addition, the Southern Manifesto, a document issued for congressional record in 1956 that was created by anti-integrationist senators and signed by 82 of the 96 representatives from the South, denounced integration as an encroachment “upon the reserved rights of the states and people” (Aucoin, 1996). As Haney López (2014) argues, the strategic avoidance of white supremacist language in favor of the language of federalism “was enough of a fig leaf to allow a person queasy about Black equality to oppose integration without having to admit, to others or perhaps even to themselves, their racial attitude” (p.16). In this way, the rhetoric served to stimulate strong reactions from whites through implicit and deniable references to white supremacy.

Often accompanying “states rights” arguments were references to the maintenance of local customs and the integrity of neighborhood schools, which contained a palpable racial subtext. For instance, in his speech denouncing the Civil Rights Act of 1964, Wallace criticized the federal law for “destroy[ing] neighborhood schools,” for its design to “make federal crimes

¹⁵ In this study, I use the terms discourse and rhetoric interchangeably.

¹⁶ The time frames I present are intended to provide a general sense of the years in which the reform wave occurred. Specific end dates for the reform waves are generally ambiguous, leading the waves to overlap and co-exist.

of *our* customs, beliefs, and traditions,” and to “regulate *our* most intimate aspects of *our* lives by injunction [emphasis added]” (Wallace, 1964). Arkansas Governor Faubus, infamous for his resistance to the integration of Central High School, utilized similar language in his denouncement of school desegregation in 1958. He argued that the Supreme Court decision amounted to “integration at any price, even if it means the destruction of *our* school system, *our* educational processes, and the risk of disorder and violence that could result in the loss of life—perhaps yours [emphasis added]” (Faubus, 1958). While an undiscerning eye could interpret “our” as a reference to the Southern collective, the use of this pronoun in the defense of segregated schools in both statements suggests that the political figures aimed to stoke racial anxieties for white audiences. The attack on “*our* customs, traditions, and beliefs” was really an attack on white preferences to restrain and disassociate from the Black population, two characteristic features of the South’s segregated regime.

Overall, the racial politics surrounding initial desegregation efforts was characterized by overt tensions between Southern whites and African Americans. These conflicts were facilitated and exacerbated by political figures who sought to mobilize opposition to desegregation through coded racial appeals like “states rights” and deniable references to local ways of life.

Phase 2: School Finance Reform and the Move to Desegregate Dollars (1971-1978)

After almost a decade of evasive tactics to avoid integration, federal legislation and Supreme Court decisions facilitated a momentary period in which integration began to take hold in the South and gain traction in the North. Despite this period of momentary success from about 1965-1973, increasing resistance to desegregation from various factions stifled progress. For one, President Nixon, whose political campaign for the presidency signaled the solidification of the Southern Strategy and its use of race pandering to garner electoral votes (Haney López, 2014), was firmly in office. Once in office, he appointed conservative justices to the Supreme Court who stifled desegregation, used Congress to limit urban integration efforts, and replaced members of the Cabinet who had enforced desegregation efforts during their tenure (Graham, 1996; Orfield & Eaton, 1997; Panetta & Gall, 1971). These presidential decisions resulted in restraints on how integration plans could be designed and enacted and thus thwarted much of the progress that had been made.

Beyond the conservative, anti-integrationist sentiment of the three branches of government, resistance to desegregation was growing within and among marginalized racial groups. The integrationist aspiration that had predominated the Civil Rights Movement was now being challenged by the rise of Black nationalism, thus dividing the African-American community on its approach to education reform (Bell, 1976, 2005; Peller, 2012). Pointing to mounting evidence of racial discrimination experienced by Black students attending schools under desegregation plans (Rist, 1978), many critics argued that a sole focus on integration missed what integration was supposed to enable: equitable learning environments for Black students (Bell, 1976). These divisions within the Black community were exacerbated by the shifting racial politics of other marginalized groups who sought to see their own needs reflected in policy. Specifically, immigrant and Latino groups increasingly advocated for bilingual education, an initiative that competed with desegregation in policy discourse and whose implementation required that students be concentrated rather than dispersed across schools (Brilliant, 2012a). Overall, the evolving racial politics within and among minority groups reflected the growing disillusion with integration and undermined its momentary advancement.

In light of growing resistance to integration, education policy became less about desegregating students and more about “desegregating dollars” (Brilliant, 2012a). While the ruling in *Rodriguez v. San Antonio* (1973) suggested that the federal government would not intervene to ensure equitable school funding, litigation seeking the redistribution of resources proliferated and succeeded at the state level (Rebell, 2009). What ensued in the mid-1970s was an emphasis on school finance reform as a favorable redistributive alternative to desegregation.

Rhetorically, the eclipse of desegregation for school finance reform was enabled by the continued use of racially coded phrases. Political figures, including Nixon, commonly invoked the phrase “forced busing,” which referred to the transport of students across school or district boundaries to facilitate integration (Haney López, 2014; Orfield & Eaton, 1997). Forced busing served as a euphemism for desegregation, and with its deracialized language, became a coded appeal that obfuscated one’s race-based motivation for opposing integration. References to forced busing often co-existed with Nixon’s appeals for law and order, which incited fears over the racial order (Haney López, 2014). Nixon disparaged racial activists as “lawbreakers,” a discursive frame that indexed Southern resistance to civil rights and the unlawful acts of protesters resisting segregation in the 1950s (Haney López, 2014, p. 23). Haney López (2014) argued, “Dismissing these protesters as criminal shifted the issue from a defense of white supremacy to a more neutral-seeming concern with ‘order,’ while simultaneously stripping the activists of moral stature” (p. 23-24). Thus, even though busing was legal practice, the discursive coalescing of busing, law and order, and racial activism elevated white anxiety surrounding this practice and in turn, elicited continued white resistance.

While “forced busing” appealed to whites, it also served as a powerful appeal to marginalized racial groups. The rhetorical frame capitalized on the increasing disappointment nonwhites expressed in regards to desegregation efforts. Many prominent, Black leaders, holding a range of political and ideological positions, spoke out against busing. For instance, in the wake of the *Milliken* decision in 1974, Detroit Mayor Coleman Young stated, “I shed no tears for cross-district busing” (Patterson & Freehling, 2001, p. 180). Similarly, Roy Innis, the national director of the Congress for Racial Equality, expressed, “The best approach to providing quality education for Black children lies in equalizing the money spent on the education of all children... No one ever learned anything on a bus” (cited in Brilliant, 2012a, p. 234). Thus, the busing frame tapped into growing, Black opposition to this practice and its inability to generate significant improvements in educational opportunity (Orfield & Eaton, 1997). To further convince racial groups to oppose desegregation, political figures complemented the forced busing appeal with rhetoric that suggested that all individuals would benefit from a different policy approach. For example, during his tenure as California governor, Ronald Reagan argued for school finance reform by claiming, “No single issue has produced a greater overall expression of concern—from every ethnic segment of our citizenry—than that of forced busing of school children” (cited in Brilliant, 2012b, p. 236). While still speaking to white audiences through the reference “every ethnic segment,” his comments also were an effort to acknowledge how various racial groups expressed concern over desegregation efforts and would benefit more significantly from finance reform to meet their education needs.

In employing “forced busing” as a euphemism for race-conscious desegregation, Nixon and other policymakers appealed to both white and nonwhite interests surrounding this controversial practice. While serving to rebuff continued desegregation efforts, Nixon and others used this rhetoric to advance the idea of improving neighborhood schools through fiscal equity

(Brilliant, 2012a), suggesting increased school funding could enhance educational opportunity for all racial groups with the added benefit of maintaining segregated learning environments.

Phase 3: Marketization of the Education Sector (1978-2005)

While school finance reform narrowed fiscal disparities across districts (Rebell, 2009), this progress was stunted by the onset of the market-based policies. Beginning in the late 1970s, market reformers sought to restructure the education system by injecting business models and market principles like competition, deregulation, and decentralization into public schools (Bartlett, Frederick, Gulbrandsen, & Murillo, 2002; Clark & Amiot, 1981). This corporate turn was first signaled by the tax revolts of the 1970s and later epitomized by policies instituted during the Reagan administration that resulted in the disinvestment and deregulation of public schools. Reagan's policies also significantly affected school integration by decreasing federal oversight and financial support for these efforts (Bell, 2005; Orfield & Eaton, 1997; Orfield et al., 2012) while resurrecting federal advocacy for school vouchers and tuition tax credits, mechanisms that had impeded integration post-*Brown* (O'Brien, 1996).

By the 1990s, the marketization of public schools had become *modus operandi* as policymakers from both sides of the aisle embraced market reforms (DeBray-Pelot, 2007; Wong & Sunderman, 2007). At the same time, there was growing public concern about resegregation and the retrenchment of performance and funding gaps (Hess and McGuinn, 2002; Orfield & Eaton, 1997). Policymakers needed to respond to critics with a revised policy approach that maintained its market orientation while addressing these visible disparities. High stakes accountability policies would be that compromise. Accountability policies called for states to establish shared content standards and annually measure student performance on those standards with mandated assessments. In holding schools to common standards, the theory of action suggested that educators would be motivated to work harder and employ more effective, pedagogical approaches to increase student achievement. This approach, which emulated successful business practices in its keen focus on outcomes (Newmann, King, & Rigdon, 1997), was originally discussed among policymakers at a convention of the nation's governors in 1989. It was later codified in various waves of federal education legislation but its most forceful application came with the 2001 No Child Left Behind (NCLB) (Wong & Sunderman, 2007).

Central to the advancement of market reforms was rhetoric that tied redistributive or welfarist policies to race. In other words, politicians had to persuade citizens that expensive social welfare policies were at the root of societal problems. To do so, they employed racially coded statements to suggest that the populace "think about government help in terms of race," and in turn, reject "the lessons of the New Deal in favor of the nostrums promoted by corporate titans and loaded insiders" (Haney López, 2014, p. 74). Haney López (2014) demonstrated how Reagan made this link. He showed how Reagan peppered his critiques of redistributive policies with comments conjuring images and stereotypes of nonwhites, like the "Chicago welfare queens" receiving innumerable benefits with "eight names, thirty addresses, [and] twelve Social Security cards" and young fellows buying T-bone steaks with food stamps. In contrast, Reagan would characterize whites as hard-working taxpayers, playing by the rules but struggling to get by. Future presidents also utilized these racial cues to further codify market-oriented policies. For example, George W. Bush aggressively attacked affirmative action initiatives and advanced economic policies benefiting corporate elites, often reverting to dog whistles like "entitlement spending" to cover up the deficiencies of his economic policies (Haney López, 2014, p. 116). Through this rhetoric, policymakers associated welfarist policies with nonwhites, suggesting that

government support enabled marginalized racial groups to behave in unproductive and pathological ways. This link, which triggered white concerns over the maintenance of social and economic advantage, appealed to white audiences and successfully garnered support for the dismantling of redistributive policies in favor of market-oriented ones.

This discursive racialization of the welfare state translated to education reform as politicians frequently suggested that significant government investment had not improved U.S. schools. For instance, Reagan attacked government oversight and investment in the education sector and described public schools as an expensive social service, situating them squarely within the welfare state. For example, in a response to the highly publicized commissioned report *A Nation at Risk* (1983), Reagan opined, “We spend more money per child for education than any other country in the world. We just haven't been getting our money's worth. And we won't until we reverse some of the dangerous trends of recent years” (Reagan, 1983). In his comments, Reagan expressed concern over the fiscal investment in America's public schools and the minimal return it had generated. Beyond these market references, these comments can be interpreted within the broader rhetoric linking race with welfare policies. Reagan's references to large government investment alongside words like “dangerous” signal the racialized welfare state that he so frequently discussed. Overall, as market policies were advanced, government investment and social services, including education, were discursively associated with marginalized racial groups, thus triggering racial animus and facilitating white support for market reforms.

While Reagan-era rhetoric was characterized by the disparagement of marginalized racial groups, the racial appeals deployed with accountability policies in the 1990s and early 2000s were more inclusive or amicable toward minority groups. Rhetorically, political figures invoked the idea of racial equality¹⁷ as they promoted accountability policies like NCLB. President Bush famously argued that its keen focus on the racial achievement gap worked to combat “the soft bigotry of low expectations” (Bush, 2000), a phrase that does not specifically name race but signals racial animus through the use of the word “bigotry.” In other comments on NCLB, Bush used racially coded discourse to refer to the students who would most benefit from the law, identifying “inner-city kids, or those whose parents don't speak English as a first language” as the target populations of the federal bill (Bush, 2009). Bush's Secretary of Education Rod Paige also alluded to how the bill advanced racial equity. He stated that the racial achievement gap was the “civil rights issue of our time” and suggested that NCLB could provide the substantive change that the *Brown* decision paved the way for (Paige, 2004). In using racially coded appeals that signal notions of racial equality and the continued fight against discrimination, accountability advocates advanced a powerful racial appeal that aimed to garner the political support of marginalized racial groups and progressive audiences.

Overall, policymakers enabled the institutionalization of market-based reforms by discursively tying race to redistributive policies and welfare programs. In doing so, they provided a racialized justification for the dismantling of big government in favor of systems that embodied market principles and practices. Public officials implicated education in this neoliberal

¹⁷ Accountability advocates embraced the goal of racial equity but operationalized it in terms of the erasure of the racial achievement gap and the prescription of a minimum standard of content for all students (Orfield, 2001). Instead of attending to the systemic disenfranchisement of communities of color or the increasing resegregation of U.S. schools, accountability as a ‘race conscious’ policy meant that the academic performance of racial groups would be measured, tracked, and publicized (Leonardo, 2007; Losen, 2003; Orfield, 2001).

project, using racial cues that both disparaged communities of color and claimed an equity orientation.

Phase 4: The Proliferation of School Choice via Charter Schools (2000 to present)

As NCLB codified the accountability regime, it also enabled the proliferation of school choice options, including charter schools which arose as a widely lauded and supported iteration of this market initiative. While charter schools became institutional players in the education landscape in the early and mid-1990s (Lubienski & Weitzel, 2010; Sugarman & Kemerer, 1999), accountability policies provided incentives for private-sector involvement in schools failing to meet performance standards (Burch, 2006). Most relevant to the growth of charters were the law's stipulations that students in schools failing to meet Annual Yearly Progress (AYP) could opt into a school of choice or the school itself could be restructured by a charter operator (Lubienski & Weitzel, 2010). During the NCLB era, the number of students enrolled in charters rose from 0.3 to 2.1 million as charters grew to represent 5.8 percent of the public school landscape (National Center for Education Statistics, 2015). Disaggregated state and district level data suggested even greater growth (Furgeson et al., 2012; Wells et al., 2000), particularly in low-income, communities of color that were most affected by NCLB sanctions.

Much of the early rhetoric around charter schools in the 1990s emphasized market themes, including those related to choice, competition, and efficiency (Kolderie, 1990). Because the charter concept was first popularized by educators (i.e., Al Shanker and Ray Budde), rhetoric used to advance the charter platform also suggested that charters could enable innovative teaching practices to better meet students' needs in a way that its "bureaucratic, hierarchical, and factory-like" counterpart could not (Shanker, 1988, p. 92). In doing so, the rhetoric appealed to market-oriented reformers who sought to move oversight away from government hands, but also to whites who continue to hear the dog whistle associating nonwhites with big government.

Coded appeals emphasizing racial equity also accompanied the market language associated with early charterization. Like advocates of accountability policies, charters became discursively tied to the "unfinished business of the Civil Rights Movement" (Scott, 2013a, p. 9). For example, in his response to the widely circulated documentary *Waiting for Superman*, former Secretary of Education Arne Duncan claimed that efforts to expand school choice represented "a Rosa Parks moment" (Scott, 2013a). While never explicitly mentioning race, his references to Rosa Parks and the nonwhite students and families in the film conjured images of the race-focused Civil Rights Movement and evidence of racial inequity within our school system. These verbal cues served as strong appeals for progressives who continue to seek racial justice, and communities of color who rightfully seek better opportunities for their children (Pedroni, 2006).

Working in conjunction with these civil rights invocations were explicit calls for parental empowerment within charter school rhetoric. Charter advocates made empowerment an individual aspiration that all racial groups should engage in equally. To illustrate, in his final days in office, President Bush commented:

...[S]chool choice was only open to rich people up until No Child Left Behind. It's hard for a lot of parents to be able to afford to go to any other kind of school but their neighborhood school. Now, under this system, if your public school is failing, you'll have the option of transferring to another public school or charter school. And it's—I view that as liberation. I view that as empowerment. (Bush, 2009)

These references to empowerment were also codified in the titles of various legislation like the federal Empowering Parents through Quality Charter Schools Act (2011) that enabled the expansion of school choice and charter schools, thus saturating this legislation in rhetorical cues to a strongly connoted term (Scott, 2013b). Overall, these appeals to racial equity and empowerment served as strong appeals for communities of color and progressives to join the charter coalition.

The movement's two-decade lifespan suggests that it has incorporated an array of discursive appeals, which have facilitated the broad coalitions of actors supporting charter schools. As Bulkley (2005) states, "Charter schools could easily be called the 'all things to all people' reform as the rhetoric of charter advocates can appeal to people with varied political viewpoints" (p. 1). This assessment suggests that charters can also appeal to varied racial and ideological groups. As charter advocates espouse references to civil rights, empowerment, and increased educational opportunity, they appeal to nonwhites and progressives who critique the continued mistreatment of marginalized communities by traditional public schools. Conversely, charter rhetoric holds strong appeal for whites and market-oriented individuals who continue to associate the public sector with Black and Brown communities. By supporting a market reform that is enshrouded in the language of social justice, whites can argue that "they are attacking public education because they care so deeply about protecting nonwhite kids" (Haney López, 2014, p. 213) while obscuring motivations that stem from maintaining their own social and economic capital.

Patterns in National Racial Politics & Educational Rhetoric

What does this 60-year history suggest about the racial politics surrounding education reform? What do these patterns reveal about the racial, political context in which CMOs have arisen and proliferated? In the following sections, I discuss the characteristics of the racial politics surrounding predominant education policies in the post-*Brown* era and consider its implications for schools.

Growing Attempt to Secure Diverse and Multiracial Coalitions

Over the past 60 years, prominent figures have increasingly used political tactics and messaging to secure more expansive and multiracial coalitions in support of education policies. In contrast to the tactics and rhetoric employed to move white, segregationist audiences in the wake of *Brown*, subsequent waves of reform were characterized by messaging that could appeal to a wide range of actors who came to oppose or support a reform from different philosophical or pragmatic reasons. In the era of school finance reform, the effort to "desegregate dollars" and the invocation of "forced busing" appealed to many whites who continued to oppose integration efforts and communities of color who bore the day-to-day challenges of these initiatives. Within efforts to institute high-stakes accountability and charter schools, politicians deployed rhetorical cues that would garner support from white and nonwhite audiences and the business community. Simultaneously, the discursive attention to the racial achievement gap and the attack on the "soft bigotry of low expectations" appealed to marginalized, racial groups, signaling that policymakers acknowledged the continued presence of discrimination and were showcasing its persistence on a public stage. Most recently, references to civil rights and empowerment, which continued to be espoused alongside business-friendly rhetoric, were intended to elicit reactions from marginalized communities who continue to seek remedies for persistent inequities. In employing

these appeals, policymakers sought to garner support or at least, quell resistance to policies from various racial groups.

Consistently Colorblind Rhetoric for Expanding Audiences

The rhetoric surrounding education reform in the post-*Brown* era suggests that policymakers have employed racialized patterns in their discourse. First and foremost, the rhetoric has consistently been comprised of implicit racial language. From the espousal of “states rights” and “forced busing” to the more recent appropriation of justice-oriented language, policymakers have employed language that does not explicitly name race in the context of education reform. Instead, they opt for key words or phrases that signal the racial dynamics at the center of the respective reform effort, subtly implicating ideas of race and racial hierarchy in education discussions.

While occasionally utilizing racially coded appeals that are more positively connoted (e.g., empowerment, civil rights), this rhetoric has more frequently included implicit references to racial groups that pathologize or stereotype nonwhites. In the era of school finance reform, Nixon did this by discursively tying forced busing to notions of law and order. With the onset of market-based policies, political figures advanced pathological narratives of marginalized racial groups to implicate people of color in the dysfunction of big government and redistributive practices. In these instances, policymakers reified negative social understandings of racial groups. By doing so through implicit racial references, they reified colorblindness, the dominant racial ideology through which individuals make sense of race relations and existing racial inequalities (Haney López, 1996, 2014; Omi & Winant, 1994). Overall, the strategic use of colorblind frames to secure diverse coalitions has resulted in the presence of conflicting and incompatible discursive frames surrounding education reform that index negative perceptions of racial groups while elevating equity claims.

Equity as a Central Yet Elusive Goal

Shifting racial politics and racial appeals have characterized the educational, political landscape for decades. Yet, what have these politics and appeals been in service of? How have these dynamics affected reforms intended to mitigate persistent racial inequity in U.S. schools?

First, the use of racially coded appeals in the 60-year period after *Brown* has enabled the persistence of segregated schooling environments. Invocations of “states rights” and “forced busing” directly aimed to maintain segregation. Rhetoric employed by market reformers in their support of decentralization, choice, and performance assessment enabled the resegregation that characterizes the education landscape today. Reformers advancing market-based policies also ignore integration as a critical aspect of racial equity, instead calling for more individualistic forms of empowerment that are to be enacted in segregated settings. In short, educational leaders have used coded racial appeals to resist explicit desegregation efforts or to advance reforms that promise to enhance school quality while not requiring the integration of white and nonwhite students.

Beyond maintaining segregated learning spaces, the reforms advanced through these appeals have not significantly increased educational opportunities for marginalized racial groups. As marginalized groups are persuaded to abandon the goals of desegregation in favor of choice initiatives or school finance reform, the reality has not lived up to the rhetorical promise. The abandonment of “forced busing” in favor of school finance reform resulted in only the momentary mitigation of fiscal and racial inequities. The promise of accountability policies in

improving educational opportunities has yet to be fulfilled as majority-minority schools are disproportionately sanctioned for low performance (Novak & Fuller, 2003) and thus pushed to employ ineffective pedagogical practices that deter the development of robust learning environments (Booher-Jennings, 2005; Darling-Hammond, 2004; Lipman, 2003). The evidence on charter schools also suggests that they, too, have not consistently enhanced educational opportunities for students of color (Carnoy et al., 2005; Miron et al., 2011; Welner, 2013). Thus, while racially coded appeals are intended to persuade nonwhites and progressives to support various policies that further racial equity, the reforms have provided short-lived, inconsistent relief and in turn, maintained inequitable learning environments.

Examining the Evolution of Racial Politics Through CMOs

The reforms instituted in the 60 years since *Brown* have been surrounded by political and rhetorical efforts to secure diverse and multiracial coalitions in support of a reform's theory of action. Because stakeholders draw upon different values and interests to inform their support or opposition to a given policy, political figures and policymakers have invoked multiple and varied discursive frames that appeal to a variety of audiences and racial groups. Yet, the invocation of a multiple frames for disparate audiences in the post-*Brown* era has resulted in the circulation of incompatible and even contradictory messages that can undermine a reform's equity orientation. In targeting various audiences and racial groups, political figures have deployed racially coded appeals that elevate social justice and equity frames alongside references that advance negative perceptions and stereotypes of marginalized racial groups. While this political discourse has often facilitated the development of diverse coalitions, the reforms themselves have generated little systemic change for the U.S.'s most marginalized racial groups, calling leader motivation and equity claims into question.

Given their likely expansion under the Trump administration's education platform, CMOs represent a timely and critical case of how these racial politics and tactics evolve amid the broader social and political context. As they seek to sustain or grow their reform efforts in the pursuit of mitigating inequity, CMOs and their advocates engage in political and racial tactics to foster supporting coalitions. They solicit support from diverse stakeholders and in doing so, mimic these political tactics and draw upon many of the same rhetorical frames. At the same time, CMOs exist in an evolving racial and political climate, which can influence their coalition-building strategies and how race operates in their strategic efforts.

Chapter 6: Opportunities and Challenges in Birchwood’s Local Context

In addition to the national political and racial climate surrounding education reforms, CMOs contend with local dynamics that influence their approach to garnering support for their organizations. In this chapter, I describe the salient features of Birchwood’s political, economic, racial, and education landscape to elucidate the challenges and opportunities CMOs faced in their local context. Drawing upon interviews with Birchwood stakeholders and CMO affiliates, I find that city characteristics and Birchwood’s education reform history influenced how stakeholders perceive charter schools. Issues related to the legacy of community activism, the presence of interracial tension, the distrust of outside governance, and the consistent marginalization of the city’s Black community from educational benefits informed stakeholders’ assessment of local charters. On one hand, the city’s political and social history provided opportunities to build support for CMOs that were perceived as community-based. At the same time, interracial dynamics and reform legacies were challenges in coalition building as many perceived charter leaders as complicit in exacerbating negative circumstances for many of the city’s most marginalized groups.

Birchwood’s Activist Past and its Changing Political Economy

In discussing Birchwood’s education politics, interviewees cited the city’s storied history of community activism and its changing sociopolitical landscape as central contextual features that intersected with reform efforts. I describe each of these dynamics in the sections below, illustrating how they informed governance and coalition-building processes.

The Legacy of Birchwood’s Social Movements

Birchwood’s rich history of political and social activism emerged as a salient feature of the local context that affected education governance. (See pp. 45-46 in Chapter 4 for a description of Birchwood history.) Study participants frequently alluded to the city’s role in the Civil Rights Movement to describe community engagement around education issues. For example, a former city official and community organizer stated, “People are conscious, they have a history. You can’t find anybody here who doesn’t know about the history of the Civil Rights Movement. They know people have a right to be engaged.” Similarly, a community organizer in one of Birchwood’s historically Black neighborhoods described how the legacy of social movements generated an expectation for community involvement: “I think it really comes down to the protest movements because it’s an ownership... You’ll find that there is this intense feeling of ownership around the streets.” In these statements, the stakeholders argued that the city’s legacy of social movements and civil rights generated an environment in which citizens remained actively engaged and demanded a voice and presence in decision-making practices.

Several interviewees described the impact of Birchwood’s activist culture on educational governance, often citing community responses to the top-down decision-making patterns that BUSD’s superintendent had exhibited during the initial months of his tenure. For instance, the aforementioned community organizer stated, “He [*superintendent*] thinks there’s a one-size-fits-all, and in Birchwood, you can’t ever come around like that because of our history in the movement. People are used to Birchwood residents getting up and saying something and being heard.” A BUSD school board member shared a similar assessment of the superintendent’s early efforts to restructure schools: “[T]he superintendent sent out a bunch of letters and didn’t even

talk with the board first...They didn't even think that they needed to talk to the school community. So, he learned fast that he could not do those kinds of things in Birchwood." Through their descriptions of the community's response to centralized decision making, the interviewees demonstrated how an expectation for community input and engagement was embedded in the local culture. In building support for their organizations at local level, CMO leaders would grapple with the challenges and opportunities that this expectation generated. On one hand, CMOs could capitalize on the city's activist tradition and seek community input when managing their organizations. Conversely, the expectation for community input could pose challenges if CMOs were perceived as engaging in top-down management.

Shifting Political Economy and Demographic Composition

While interviewees described the democratic impact of residents' political activism, they acknowledged economic and social factors that affected the community's ability to redress inequities. Of note was Birchwood's shifting demographics resulting from gentrification. A high-ranking union official described one aspect of the city-altering practice:

[W]hen the gentrification started happening about 10 years ago, what happened is that people were living in the houses their parents or grandparents had bought, and those houses were paid off. In 2003. They were offered \$400,000 for a house that was paid off. They took the money, and they didn't stay in Birchwood. They went other places, so that's a lot of what happened all over the city.

In her statement, the union official described how the increasing property values associated with gentrification incentivized long-time Birchwood residents to leave the city. As a result of these practices, Birchwood's Black population decreased significantly, particularly in its historically Black neighborhoods that were the hub of political activity. A state union official stated that Birchwood's community focus was in jeopardy because of these demographic shifts. He stated, "There's a strong sense of community and connectedness here; or there was until the recent gentrification." A BUSD board member representing the historically Black neighborhood that was experiencing the most gentrification described its racial and political impact: "There's a lot of power being wielded right now by middle class white people with the gentrification wave...All the advocacy is coming from like 2% of the people that are actually being served in the district." While the board member's comments understate the percentage of white, middle class students attending BUSD schools (i.e., white students=10.5 percent; middle/upper class=27 percent), her comments suggest how gentrification is amplifying the political voice of the district's most resourced residents.

Many interviewees described how political and racial tensions surrounding gentrification were exacerbated by the growing number of immigrants and newcomers in the city. One BUSD board member noted how the growing immigrant population affected the city's historic Black base:

It's a city that welcomes a lot of refugees and immigrants...I think that the history of Birchwood as a city that is primarily African American has been completely changed by the fact that there aren't just African-American minorities. They are now a minority of minorities.

In this statement, the board member illustrated how the influx of immigrants coincided with the emigration of Birchwood's Black community. Shifting demographics among the city's communities of color heightened interracial distrust. A senior leader with a Birchwood-based CMO (GL1) described these dynamics: "There was a ton of tension around African-American families feeling like they were being displaced. At the same time, there was a lot of fear among the Southeast Asian and Latino families, looking at the African-American families as threatening." Her colleague at GL1 described these perceptions of Black families as resulting from the "politics of poverty and oppression." She explained, "Many of us come from countries where there is a politics of skin color...Everybody wants to be light skinned, and so there is a dismissal and disregard of African-American people because of the color of their skin." A BUSD district official elaborated upon the perceived anti-Blackness of other communities of color:

I think that the political talk about Black and Brown—meaning joined effort, common interest—is not the experience of Black and Brown people, day to day, who rub up against each other. It's really clear to me that Latino immigrant, working class parents have chosen not to have their children in schools where there are large Black populations.... Latino parents, immigrant parents, all they know about Black people is what they've read in the newspaper and it's completely unflattering. They look around their neighborhoods, and that seems to be reinforced.

Through their statements, stakeholders demonstrated how Birchwood's shifting demographics were accompanied by underlying tensions among racial groups.

Racial and economic segregation heightened tensions among Birchwood's diverse constituency. Geographically, Birchwood is composed of sparsely populated hills, which are inhabited by affluent and largely white families in comparison to the concentration of low-income communities of color in the city's flatlands. Interviewees identified race and class-based patterns of power that corresponded with the city's spatial and socioeconomic landscape. For instance, the executive director of a local CMO described Birchwood as "a city where power defies gravity and rolls up the hill." In her discussion of BUSD's decision to close a school in the city's flatlands and to leave a similarly underenrolled school open in the Hills, she stated, "White people in this city always win because they're empowered and organized." Several stakeholders specifically described how Hills parents wielded their capital to secure educational advantages. A BUSD board member discussed how these parents deployed political resources to funnel assets to their schools. Citing national trends surrounding Donald Trump's presidential candidacy and the vilification of the "other," she suggested that Hills parents spewed animosity toward those in BUSD who are perceived to be draining resources and mobilized to ensure that resources were not redirected from their schools. A CEO of a prominent community-based organization echoed the previous sentiment and suggested that Hills residents were arguing for equality versus equity:

Active white parents feel like they should not be forced to, I quote, invest in the failure of black culture, end quote. When you have active parents who feel like, I want equality, and that giving more money to places with more need, which would be equitable, is a disadvantage to me, and they have more political power to fight that, it's hard to have an equitable system.

While agreeing with the disproportionate power Hills parents exhibited, a board member representing a portion of this region provided a less racialized interpretation. She argued that this parental group had the “know-how to navigate the system and advocate for their interests,” but unlike other interviewees, refrained from grounding her comment in a racial or economic frame.

Overall, interracial tensions between Birchwood’s more affluent, white, and politically savvy constituency and other marginalized groups added a compounding layer of complexity to the existing racial tensions that permeated the city landscape. In this way, the Birchwood context reflects national trends in the racial politics surrounding education policy waves. In Birchwood, marginalized racial groups sought to advance their own interests and agendas while competing with whites who sought to maintain their systemic advantages. In this process, deficit-laden understandings of marginalized racial groups, particularly the Black community, were often at the center of interracial tensions. When engaging in coalition-building efforts, CMOs would grapple with these racial tensions and the disproportionate advantages that whites and racial groups garnered.

The Legacy of Birchwood’s Educational Reforms

Tensions arising from Birchwood’s broader sociopolitical context presented challenges in maintaining multiracial coalitions in support of the city’s education reform waves. Over the past three decades, Birchwood residents had experienced the institution of community-based and market-oriented education policies, which had generated little systemic improvement and disproportionately benefited portions of Birchwood’s population. With these dynamics, stakeholders described an underlying distrust among the city’s constituents that inhibited public support from various groups.

State Administration and the Small Schools Movement

Like many urban districts, Birchwood reformers had instituted a range of initiatives to address persistent inequities and poor district management. Interviewees suggested that the churn of reforms had generated mixed results for Birchwood students and communities. Specifically, stakeholders described the state takeover as a decisive and controversial era in the district’s history. Birchwood schools had operated under state receivership for almost a decade in the recent past, which was justified on the grounds of fiscal insolvency.¹⁸ During this time, state administrators instituted a variety of reforms that aimed to improve Birchwood’s central office processes and spur academic achievement among district schools.

One prominent reform instituted during this era was the proliferation of small schools. Several stakeholders who were deeply engaged in the small schools movement provided a favorable assessment of Birchwood schools under state administration. A founding school leader of one of the small schools cited “seven years of academic growth” as evidence of the era’s positive impact. A senior official at GL1 and a former small school leader also shared a positive assessment: “Because of the work they were doing with the new small autonomous schools, there was this huge influx of very reform-minded people, and it was a very exciting time.” For this reformer, state administration facilitated the proliferation of small schools and school-based decision making, which inspired a cohort of leaders with new perspectives on school operation. A leader of a Birchwood-based education fund also noted “kernels” and “nuggets” from this era

¹⁸ I provide an estimate of BUSD’s time under state receivership and forego naming the years or decades in which it occurred to protect the identity of study participants.

that were now bearing fruit. In referring to the reform-minded leaders, he expressed that their legacy was “putting kids first.” He noted how central office restructuring and site-based management put kids at the center and minimized resistant factions who emphasized adult rights. Overall, reform-minded stakeholders, many of whom played integral roles in the small schools movement, identified favorable educational outcomes resulting from this controversial era in Birchwood education history.

While several interviewees described the positive effects of the reforms instituted under state administration, others pointed to a more negative legacy. For instance, some interviewees cited decreased civic engagement when discussing this era’s impact. A sitting BUSD board member stated, “Activism dissipated because the elected school board had no power. What’s the point of being mobilized when the school board doesn’t have any impact on the decisions made in the district? The district has never recovered from that.” A more frequently cited negative effect of state administration was a growing mistrust of outside governance. Another sitting BUSD board member said that state administration generated a “major trauma” that resulted in a “history of mistrust about how the city’s been governed.” Echoing these sentiments, a reformer who recruits leaders from varied career fields into the education sector described the distrust emanating from this policy wave: “It was very much a more authoritarian system that shaped perceptions about outsiders coming in doing unto Birchwood. I think, depending on where you sit, perceptions or misperceptions about outsiders in Birchwood factor into the divisiveness here.” Overall, stakeholders noted how state receivership had fostered the distrust of community outsiders while quelling the city’s tradition of community involvement.

Interviewees also described the interracial tensions generated by the proliferation of small schools in Birchwood’s Latino neighborhoods during state administration. A community organizer in one of the city’s historically Black neighborhoods acknowledged that the small schools had fueled seven years of academic gains, but these educational benefits had not been equally felt: “The reform was heavy in Latino communities where overcrowding was ridiculous, but it didn’t touch the traditionally Black communities.” A GL1 senior leader described the historical roots of the small schools movement to explain this demographic imbalance. She stated that Birchwood Community Alliance (BCA), a community based organization, had mobilized small schools efforts primarily in Birchwood’s Vista neighborhood, where many Latino families resided. She explained:

There was an equal need for reform in East and West Birchwood, but there was a dwindling population there [*West Birchwood*] so you didn’t have that same pressure for small schools. I think BCA’s work wasn’t as focused in that area, so there was definitely a perception that African-American families’ needs weren’t being met.

In her statement, the GL1 leader suggests that BCA strategically engaged the city’s Latino population because of the density of students and schools in that area, generating a “perception” that the Black community was excluded from their efforts. While most interviewees named the racial imbalance generated by the small schools movement as problematic, one former district official provided a more in-depth analysis of the inequity resulting from the exclusion of Birchwood’s Black community from the small schools coalition. He discussed the creation of “inequity among the have-nots” in his comments:

If you are a have-not that fits into a type of profile and organizing that can really take advantage of starting a small school, those are probably some amazing times for education for those families and those kids, and yet...if you still have a fixed pie of resources someone's going lose if someone's going win.

In his comments, he suggests that a scarcity of resources resulted in some nondominant communities securing benefits at the expense of others. Overall, interviewees suggested that the reforms instituted under state administration had disproportionately benefited the city's growing Latino population and contributed to interracial tensions. In doing so, they provided a racialized critique that suggested that Birchwood's Black population had remained on the margins of this reform coalition.

Birchwood stakeholders provided mixed assessments of the state administration era and its accompanying reforms. While some alluded to the influx of reform-minded leaders and a sustained period of academic growth, others pointed to its negative impact on community engagement and interracial disparities. Others also suggested that the era resulted in a growing mistrust of community outsiders who sought to govern Birchwood schools and dictate education policy. As independent operators in the Birchwood context, CMOs would contend with the city's disdain for outside governance and the racial inequities that previous waves of reform generated.

Charter Schools: Continuing the Legacy of State Receivership?

Birchwood charter schools were perceived as continuing the complicated legacy of the city's small schools movement and the era of state receivership. On one level, interviewees expressed this sentiment because of the proliferation of charter schools under state administration. While charter schools had been present in Birchwood since the mid-1990s, a former superintendent stated that the state takeover was characterized by a "flood of charter schools," with about 30 opening their doors in Birchwood during this period.

Beyond the temporal association between charter proliferation and the state takeover, interviewees expressed similar mixed assessments of Birchwood charters. Like those celebrating the small schools movement, stakeholders pointed to improved academic achievement as positive evidence of charter impact. For example, the CEO of a Birchwood-based advocacy group stated that Birchwood was "the most improved urban district in California" during the years that coincided with charter proliferation and small schools transformation. He argued, "That trajectory, driven by the entrepreneurial spirit, and intropreneurial spirit, of school leaders and teachers is really instructive. It should be really instructive to a city if this was a reform that actually worked." In addition to naming academic achievement, the speaker also alluded to the influx of reform-minded leadership with charter school proliferation, which was named as a positive feature of the small schools movement by other education reformers. While less frequently cited, some interviewees described the creation of diverse school options as a positive effect of charter growth. To illustrate, a prominent education reformer argued that charters "provided extraordinary programmatic diversity and options for kids and for families that the district could provide, but hasn't had the kind of vision or intention." Overall, reform-minded interviewees cited many of the same arguments they put forth in support of the small schools movement to advance their positive assessment of charter impact.

As charter advocates highlighted performance and programmatic contributions, they also positively characterized Birchwood charters as being "homegrown" or community-based. A representative of the state charter advocacy agency explained, "A number of founders of charter

schools are Birchwood residents—we don't have outside charter groups coming in to fix Birchwood. We have people from Birchwood that said it needs to be fixed.” A local education reformer echoed this sentiment: “Charters are not being created by white millionaires from out of town. Birchwood charters are generally being created, and demanded, by educators or families here who are dissatisfied.” Similarly, a leader of a Birchwood-based advocacy group described how Birchwood CMOs embodied this homegrown orientation:

There's the interesting thing about Birchwood as a charter sector as opposed to other cities. We don't have Achievement First or Uncommon schools operating schools here that have parachuted in from elsewhere. ML2, serving schools all over the area, has its headquarters here in Birchwood. GL5 are here in Birchwood. GL4 is here in Birchwood... When I think about the criticism of charters in other places and other cities, it's like "Oh these charters are carpetbaggers," but that's actually much less the case here.

Through their comments, charter advocates characterized Birchwood charters as local organizations that emerged from the community or maintained strong connections to the city. Through this characterization, advocates distanced the sector from perceptions of charters and CMOs as community outsiders. Emphasizing the sector's homegrown orientation counteracted the distrust of outside governance that had been fostered in earlier reform waves.

While charter advocates lauded the sector's community roots, others provided critiques of charter and CMO leadership that complicated this homegrown narrative. For example, a community organizer stated, “There's just mistrust in charters in general and that's because they are seen as white-ran... It's almost this feeling of another attempt at oppression for you to bring a school into my community and we didn't ask for it.” While acknowledging her pro-charter stance, a BUSD board member also interrogated charter leadership along racial lines: “It's a perpetuation of racism and institutional racism. These schools are coming out of whiteness culture and a paradigm of we're going to be the savior.” In their comments, these stakeholders suggest that one's “homegrown” status had more to do with race than Birchwood residency. The speakers suggested that white leadership made Birchwood charters outsiders to many residents of color. An independent charter school leader also questioned the homegrown label that many ascribed to Birchwood charter leaders. He stated:

To me, homegrown means that you can walk through my hood at night and walk up to people and talk to them. I don't know how many of those people could actually do that... What I do know is, is that when I look at who they're serving, and when I look at who they're not serving, I have a lot of questions about them using the idea of being homegrown because homegrown people do what civil rights leaders did. They find out who needs us the most, and then they actively recruit them in. That's the tradition of the city.

Unlike the previous speakers who tied outsider status to whiteness, this stakeholder based his assessment of homegrown leadership on their willingness to engage with communities in culturally responsive ways.

The independent charter leader's comments also reflect another point of contention among Birchwood stakeholders in regard to charter impact—the exclusion of high-need

populations from their schools. In discussing the prospect of a common enrollment system, a BUSD official described the multiple exclusionary practices charters maintained:

The fact that a charter school cannot serve lunch, that's a creaming mechanism. The fact that they do not have programs for the blind and for kids with cerebral palsy and they're not serving their fair share, that's not fair. The fact that a charter school could be full on day one and have a waiting list and never have to accept the mid-year entry student or a kid in foster care doesn't get placed in February for their August school start date... That's not a real school.

In addition to these enrollment impediments, her colleague at the district noted the sector's underenrollment of English learners and students with special needs. She argued, "We're creating two systems. We're creating a system that is responsible for educating the kids with the most needs and a system that takes the cream of the crop, if you will, or kids that 'follow the rules' and are 'easy' to educate." While most who advanced this critique were unassociated with the charter sector, a few charter leaders acknowledged enrollment challenges, particularly with regard to students with special needs. For example, one independent charter school operator stated, "It's a bunch of autonomous schools, and it's really not set up to do anything innovative. Naturally, it is going to lend itself to having fewer students with more challenging disabilities." This leader's candid discussion of enrollment discrepancies was an outlier when compared to other charter managers, who tended to respond to these claims with critiques of the district's poor service to these same high-need populations.

While several critiqued Birchwood charters for underserving English learners or students with special needs, most interviewees identified the disproportionately low number of Black students enrolled in charters as a central criticism. Several interviewees attributed this marginalization to the history of coalition-building efforts by BCA. One local market reformer stated, "The community organization that was most active in helping to create charter schools was BCA, and BCA's strongest base is with Latino churches. What that means is even to this day, if you look at the enrollment of charter schools, it's not comparable in terms of percentage of African Americans." A school leader with the local CMO GL2 explained how these early organizing efforts led to a concentration of Latino students in Birchwood charters: "What we've learned is that who has seats on Day 1 for a couple of years impacts who you are going to be because of sibling presence." Through the mechanism of sibling enrollment preferences, the GL2 leader described how early recruitment affected charter waitlists and the racial groups most likely to be served.

While stakeholders cited early charter outreach and enrollment priorities as contributing factors to the exclusion of Black families, others attributed this phenomenon to strategy. A leader of an independent charter school stated:

There are fewer proof points around how to do it well. So, I think frankly, there's some strategy involved in that. If you are going into it, you want to be successful, and I think some of the bigger operators, especially, have shied away from going more heavily into areas that have a heavier African-American population because they are afraid they are not going to be successful.

In her comments, the speaker suggested that other charter leaders strategically avoided Birchwood's Black community because of their lack of understanding of how to serve African Americans well. A CEO of a local leadership development nonprofit made a similar argument: "Because Black children have been so difficult to reach, the charter sector has forsaken them because they can't operate without proof points of success. Their funders demand success and want to see results, so they feel the pressure to deliver." While naming "proof points" like the previous charter leader, this CEO also alluded to the results-based pressure that charter leaders receive from donors, which can discourage them from enrolling higher numbers of Black students.

Others framed the marginalization of Black families in charter coalitions as a product of Black resistance. For instance, a CMO staff member and parent organizer stated, "Parents who send their kids to charter schools don't have strong connections like African-American parents that were born and raised here and went to the original schools." In his statement, the speaker suggested that Black families maintained a strong loyalty to Birchwood public schools that other racial groups did not share, making others more willing to enroll in charters. The leader of a local education fund also described the Black community's connection to place as contributing to Black resistance to charters, but explained how economic factors intersected this stance:

BUSD is the 4th largest employer in Birchwood. There are 5000 employees. 2000-3000 of them aren't teachers. So, when you come in and say we want to take over or close this school, you do realize that there are custodians who will not work at your new charter...If you say we are going to blow up the system and destroy it, people are like I've been a janitor for 20 years. What am I going to do?

For this speaker and two others interviewed in this study, the employment opportunities available in traditional public schools provided Birchwood's Black community a disincentive from supporting charter school presence. Others described Black reluctance to join charter efforts through the lens of cultural responsiveness. In expressing how charter faculty created an unwelcoming environment for the Black community, a BUSD district official stated that Black families "want to see some people who are teaching their kids who look like them. They want to see some cultural acknowledgement." A founder of GL3 shared similar sentiments in her description of the charter sector's culturally insensitive leadership practices:

It's not a welcoming space. It's not a culturally competent space. It's not an inclusive space. It's not a space that's open to the depth of dialogue that's necessary to really hash out the nuts and bolts of what you have to do to serve communities and children of color in a way that they deserve to be served, in a way that honors who they are, and honors their heritage, their people, their legacy, and their very being.

Through their comments, these stakeholders suggest that the underrepresentation of Black teachers and leaders in charter schools fostered a sense of alienation for Black families.

Given these dynamics, interviewees cited distrust as a critical impediment preventing Black families from enrolling in charters. In discussing the inability of charter leaders to recruit Black families, a local education nonprofit leader stated, "Black families have struggled so much. The dysfunction is so deep. The mistrust is so strong. It's harder to move us. It can be

done, but most of the people doing it don't have the right grip." The CEO of the CMO GL4 contrasted the trust felt by Birchwood's Black and Latino communities:

African-American communities have been so underserved for generations and generations. There's a lot more distrust in school and the impact it can have, and it's harder to serve a student who doesn't have the family members that are in line with the school's philosophy and things like that. Whereas a lot of our Latino families especially in Birchwood are first generation themselves. They don't have the inherent mistrust.

While these interviewees focused on the lack of trust that Black families have toward charter schools, an independent charter school leader explained how this mistrust had resulted from decades of systemic inequities within BUSD. He described, "Charters' decision to cherry pick the students that fit most cleanly into the model of education they want to use is simply a school systematizing something that's already been endemic to this system." Thus, while many factors contributed to the distrust Birchwood's Black community maintained for charter schools, the speaker explained how this distrust was born of decades of educational mistreatment.

While many reform-minded interviewees provided evidence of charters' positive impact and its community-based orientation, others complicated these assessments by citing issues of racial incongruence among charter leaders and communities and the exclusion of high-need populations from their schools. For those who maintained critical perspectives, they perceived charters as continuing the negative legacy of the reform waves that had preceded it. In seeking stakeholder support, CMO leaders would contend with these charter critiques and deploy strategies to counteract these negative dynamics.

Patterns in Birchwood's Sociopolitical Context

Birchwood's sociopolitical context presents both opportunities and challenges with which CMOs must contend in securing coalitions. At the city level, Birchwood's legacy of social activism nurtured an environment of community engagement that motivated its constituents to demand transparency and collective decision making. At the same time, this democratic expectation generated instances of tension and conflict for education officials in regards to accountability and governance that CMOs would grapple with in advancing their agendas. In addition, gentrification was changing Birchwood's populace and in turn, eroding its tradition of activism and exacerbating interracial tensions. In legitimizing their organization and their equity claims, CMOs would contend with issues of segregation and the disproportionate power exerted by both privileged and marginalized groups in the city.

Birchwood CMOs seeking to sustain their organizations are also doing so in a context with distinct political and racial dynamics. Politically, the era of state administration fostered a sense of distrust of Birchwood outsiders—an orientation that was bolstered by the city's grassroots activism and demand for community input. Given the variation in CMO ties to the local context and the national narrative surrounding CMOs' corporate operation, leaders would grapple with this tension. Furthermore, the prominent reform instituted under state receivership—small schools—had disproportionately benefited the city's Latino population, thus heightening interracial tensions. Growing Black and Brown tensions within the reform landscape also occurred against a larger sociopolitical backdrop that prioritized the needs and interests of its growing affluent and white base.

Stakeholders described several ways in which charter proliferation had contributed to or exacerbated the racial and material inequities generated by previous waves of reform and city dynamics. Many interviewees expressed critiques of the differential recruitment and inclusion of particular racial groups in charter efforts. With their assessments, stakeholders included racialized critiques of the predominance of white leadership within the sector, its strategic avoidance of Black communities, and its lack of cultural competency. The resulting mistrust of the charter sector by many of the city's marginalized communities was a prominent issue that CMOs would contend with in the local environment as they sought to engage and secure support from a variety of stakeholders in the local context.

In the next chapter, I describe the various engagement strategies CMOs employed in coalition building and examine if or how these strategies were deployed in response to the sociopolitical context. I also attend to how race and racial messages were utilized in CMO efforts to secure support and buffer critiques from the broader context.

Chapter 7: Coalition-Building Strategies & Strategic Messaging in Birchwood CMO Efforts

National trends in education politics suggest that reformers have increasingly sought to secure multiracial coalitions with the use of racially coded appeals. In Birchwood, local dynamics, including interracial tensions, a distrust of outside governance, and democratic expectations, intersected with these broader patterns, creating the unique context in which Birchwood CMOs crafted and enacted strategies to create coalitions in support of their organizations. In this chapter, I draw upon observations, interviews, and organizational documents to describe these coalition-building strategies and how Birchwood's 10 CMOs foregrounded race in the process. First, I discuss how CMOs developed engagement strategies. I, then, investigate and compare the relational and discursive strategies CMO deployed as they engaged four key stakeholder groups—policymakers, teachers, parents, and funders.

I find that CMOs generated a range of formal and informal strategies to engage stakeholders, but varied in the degree to which they considered race in developing these tactics. In implementing their coalition-building efforts, CMOs emphasized disparate organizational features and advanced distinct rhetorical themes that would resonate with their target audiences. Despite this variation, CMOs typically employed colorblind language when engaging different audiences, yet the accompanying narratives were either positively or negatively connoted depending upon the perceived values and beliefs of their target group. The strategic use of race in CMO coalition building suggests that race operated as a form of political currency. As CMOs competed for resources and legitimacy, they used distinct racial frames to garner support and conformed to the racial norms and preferences of their stakeholders.

CMO Engagement Strategy Development

To identify patterns in CMO strategy development, I analyzed 15 interviews with CMO leaders, 467 documents (e.g., charter petitions, webpages), and field notes from 34 hours of CMO board meeting observation. Through this analysis, four groups emerged as critical CMO constituencies: policymakers, parents, funders, and teachers.¹⁹ In interviews, eight leaders identified local policymakers as fundamental to CMOs because of their gatekeeping role in charter authorization or facilities access. Each of the interviewed CMO leaders also discussed the importance of parents, noting their motivational role in the work while suggesting that parents affected CMO stability in regards to enrollment and fiscal solvency. In addition, data revealed that donors were important stakeholders that supported school operations, facilities development, and CMO growth. In addition to operating webpages dedicated to donors, CMO leaders identified funders as key stakeholders in ten interviews, and donor engagement was discussed at nine of the 11 observed board meetings. While rarely mentioned in interviews or board meetings, document analysis suggested that teachers were another critical stakeholder group as CMOs detailed teacher recruitment plans in their charter petitions and over one fifth of CMO webpages were dedicated to teacher audiences. In the following sections, I describe how CMOs developed

¹⁹ Three CMO leaders, each of whom worked at organizations that disseminated technological products or pedagogical models, also discussed external partners as critical stakeholders. In their comments, leaders emphasized the importance of securing external partners for financial investment and for the expansion of product markets.

strategies for three²⁰ of these stakeholder groups and how race was acknowledged in that process.

Foregrounding Race in Parent and Teacher Engagement

CMOs developed race-based strategies to recruit parents and teachers. With regard to parents, CMOs described how they would recruit a diverse family population in each charter petition. The most frequently cited strategy in service of diversification was the use of translated materials and presentations for Spanish and Chinese-speaking audiences, which was named in each of the 31 CMO charter petitions. In addition, three CMOs mentioned using staff of color or diverse community organizers in recruitment to leverage their cultural capital. Four CMOs also cited the circulation of materials in “appropriate cultural contexts.” In one illustrative example, GL5 described its efforts to “tailor its program to align with the priorities and needs of the [African-American] community.” Noting research the CMO had conducted to understand the paucity of Black students in its schools, GL5 detailed its decision to recruit in Black churches and to include references to programmatic components like athletics and access to health services, which they concluded were things that “the African-American community prioritizes in a school environment.” While occurring infrequently, CMO leaders discussed the issue of diverse parent recruitment at two of the 11 observed CMO board meetings. In one instance, GL2 staff described efforts to increase the number of African-American families attending their schools. Because Black families were underrepresented in Birchwood charters, the board wanted details of how staff were working to counteract this external threat to their organizational brand.

Data sources also suggested that half of the CMO population foregrounded race in developing strategies for teacher outreach. At governance meetings of four CMOs, board leaders discussed the recruitment and retention of staff of color as a way to build relationships. To illustrate, CMO leaders at GL5 discussed ways of increasing racial representation among staff and board leaders to “increase connectivity” to the communities they served. Similarly, a board leader at RL1 grappled with the lack of teachers of color in their discussion of culturally responsive pedagogy. She argued that RL1 should hire more teachers who “represent the villages our children are from” as a strategy to enhance this responsive orientation. In interviews, CMO leaders from GL2 and ML1 also discussed tactics their organizations used to recruit teachers of color. These strategies ranged from posting job openings in online networks that teachers of color frequented, recruiting at local social justice conferences, and creating teacher pathway programs for their diverse pool of school support staff. While these five organizations foregrounded race in developing teacher outreach, a minority of CMOs discussed teacher recruitment through a deracialized lens. For instance, leaders at ML2 and GL1 discussed the possibility of partnering with external organizations that would subsidize homeownership in the Bay Area’s competitive housing market to “attract the best teaching talent” amid the state’s ongoing teacher shortage and saturated charter school market.

Despite the variation among Birchwood CMOs, each tended to consider race through an analysis of demographic composition. In doing so, each CMO generated racialized engagement strategies to diversify their family populations in response to critiques of the charter sector’s exclusionary enrollment practices. Five of these CMOs also considered diversity in the context of teacher engagement to make their organizations more racially aligned with local constituencies. In considering race through a demographic lens, CMOs used race-based

²⁰ The data sources in this study did not reveal how CMOs developed strategies to engage policymakers. In turn, this stakeholder group is not discussed in this portion of the chapter.

strategies that would mitigate external critiques, allowing them to enhance or maintain their legitimacy through the appearance of a diverse population.

Maintaining a Race Neutral Approach for Funders and External Marketing

Strategies for donor outreach were primarily discussed at CMO board meetings. In these settings, leaders grappled with issues that had system wide implications, including facilities, finance, enrollment, and the expansion of the CMO's local and national impact. In prioritizing these issues, nine of the ten CMOs discussed fundraising goals at each of their monthly or bimonthly meetings and emphasized the need to secure funder support through individual solicitation, formal events, and capital campaigns. Five of these CMOs dedicated portions of their meetings to training board members to leverage their professional and personal networks to expand their funder base. In one representative example, leaders at ML1 discussed the strategies board members might employ to solicit investment, including hosting informational events at their home, office, or business association meetings. In addition, four CMOs planned donor events at governance meetings, discussing guest recruitment and the event's formal programming. For instance, GL4 engaged in this process with an event planner that led the board in a discussion of their annual gala. In discussing "audience development," the planner asked the board to think about their first and second level connections who could "ramp up the money, influence, and resources" they amassed before discussing the event's activities. Overall, in emphasizing facilities, budgets, and impact, CMO leaders typically emphasized funder engagement as a means to meet these priorities at board meetings.

While CMO leaders explicitly considered race in the development of parent and teacher outreach, race was infrequently foregrounded in the development of funder engagement strategies. Of the nine CMOs observed in governance settings, only two—ML2 and GL4—discussed race in the context of donor solicitation. They did so as board members and CMO leaders sought to hone their messaging or "elevator pitch." To illustrate, GL4 personnel led board members in a conversation about developing their key messages, which were intended to "provide talking points to the board" and "clarify a compelling brand" to potential donors. In developing their pitch, CMO leaders were asked to convey the following message in some form:

We fundamentally believe that the educational inequity experienced by low-income, first generation students stems from systemic bias around race, class, and language. We also believe it is possible to interrupt that inequity, and we have a system to do exactly that.

In critiquing the proposed key messages, several board members mentioned that emphasizing the systemic piece discounted the student story or "seeing how a life on that trajectory can be adjusted." Upon this suggestion, several board members suggested that the CEO develop a folder of student stories that could be shared. While the question of naming racial or systemic oppression was not resolved in this discussion, the board members' responses suggested a greater willingness to share individual stories of hardship as part of GL4 messaging and in doing so, have the marginalized students themselves convey oppressive narratives. Similarly, CMO leaders at ML2 engaged their board in a discussion of messaging shifts that sought to "promote a positive perception of the communities they serve." In their desire to sound "less missionary," ML2 suggested that board members describe the organization without modifying students with phrases like "low-income" or "students of color." While some board members argued that discussing the racial and economic composition of students was a "selling point" for donors, the

CMO leader ultimately stated that this language would be reflected in their organizational materials and listed the following guidelines for board leaders:

- STOP:
 - Using serve
- CONTINUE:
 - Using low-income in an effective way (not with parents)—perhaps use free and reduced lunch
 - Go into areas with worst-performing schools and produce great schools
- START:
 - Naming the neighborhoods we serve (not demographics—they would know if they are familiar)

While representing outliers in the CMO population, leaders at GL4 and ML2 grappled with how race should be named in engagement efforts.²¹ While responses varied, several board members expressed reluctance in invoking race in these relational efforts.

The reluctance to name race in CMO pitches and donor engagement was also reflected in governance meetings as board leaders revised their mission statements. At seven of the eleven observed board meetings, CMO leaders discussed emergent strategic plans and revised their theories of change in that process. Only two CMOs discussed race explicitly in this context.²² One of these outliers was GL4. At its annual board retreat, CMO leaders amended the student description in their mission statement from “traditionally underserved” to “students historically underrepresented in college.” When asked about this revision, GL4’s CEO stated that underserved was “not assets based language” but was soon challenged by a board member who stated, “We are talking about Black and Brown kids. We are trading one euphemism for another.” In response, several board members argued that referring to students of color was too narrow and would elicit critiques from those asking about other marginalized groups like “poor white kids.” Ultimately, the organization opted to forego references to students of color in their mission statement. In this outlying example, GL4 grappled with identifying race in the context of their work but ultimately forewent naming it in their external facing materials, opting for a colorblind orientation.

Varying Levels of Race Consciousness in CMO Strategy Development

CMOs varied in the degree to which they considered race in developing strategies to engage key stakeholders. Each of the CMOs proactively foregrounded race in parent recruitment, and half aimed to racially diversify their staff in teacher outreach. These racialized tactics enabled CMOs to manage external critiques regarding the sector’s underenrollment of Black families while building a more diverse constituency that would demographically align with Birchwood’s populace. At the same time, the foregrounding of race in donor engagement or

²¹ While these two organizations explicitly discussed race in developing their organizational pitches, CMO leaders and board members at ML1, GL1, and ML2 discussed other strategic shifts in their messaging at board meetings. These shifts included those related to college persistence and an emphasis on charter schools being “public schools.” These discussions suggested that these established CMOs sought to refine their brand through strategic messaging that would emphasize their public status and embrace a broader approach to postsecondary career paths.

²² Board members and CMO leaders typically discussed revisions related to college attendance and organizational impact in these conversations. With the exception of GL4 and GL2, leaders eschewed discussions of systemic issues or the manner in which their constituents were being characterized.

mission statements was rare. Eighty percent of Birchwood CMOs omitted explicit racial framing from these discussions. In the few instances when CMOs named race in the context of their work, they ultimately eschewed explicit references for a colorblind orientation.

Variations in CMO Stakeholder Engagement

CMOs targeted and developed strategies for specific stakeholder groups. In this section, I describe how CMOs enacted these strategies of engagement and how race and colorblind discourse operated in these political practices. Drawing upon 15 interviews with CMO leaders, 26 hours of observation (e.g., charter petition hearings, fundraisers, community events), and 410 documents (e.g., flyers, webpages, social media, presentation slides), I describe the formal and informal coalition-building practices CMOs used to secure policymaker, teacher, parent, and funder support. For each stakeholder group, I also discuss prominent themes CMOs conveyed and how implicit and explicit racial references were utilized in each group's engagement.

Policymaker Engagement: An Explicit and Implicit Racial Approach

Because of their gatekeeping role in facilities access and charter authorization, school board members were the primary policymaker group that CMOs identified as crucial to their organizational stability. To secure board member support, CMOs enacted an array of formal and informal strategies. Formally, each of the 10 CMO generated required charter petitions that contained descriptions of their school programming, performance results, and their compliance with California's Education Code. Following the submission of these petitions, CMOs conducted formal presentations for board officials and attending members of the public. In addition to these legally required forms of engagement, eight of the 15 interviewed CMO leaders described informal efforts such as one-on-one meetings and invitations to school sites to build rapport with sitting board members.

Themes in policymaker engagement. CMOs consistently described school programming in their 31 charter petitions and accompanying presentations. To do so, CMOs listed their mission and values before detailing how their pedagogical approach and school climate embodied these tenets. GL3's policymaker engagement exemplifies how CMOs gaining or maintaining legitimacy conveyed these notions. One senior leader with GL3 stated, "Our mission is to provide a high-quality education that equips Birchwood students to thrive in school, career, and community by fueling their capacity to transform their lives and communities, becoming 21st Century leaders in the global economy." GL3 then described its cradle-to-career supports, blended learning model, and its use of participatory action research to indicate how this mission informed their pedagogical approach. GL3 leaders and those from other CMOs typically followed these descriptions with graphical evidence of student performance on state assessments to demonstrate program effectiveness. CMOs who were repairing their organizational legitimacy displayed divergent patterns in four of their seven public hearings. During two of these hearings, RL1 and RL3 leaders gave presentations on predetermined criteria to address board members' concerns about the CMOs. In the other outliers, RL1 and RL2 leaders had students, parents, and teachers speak in support of their schools for the duration of their presentations.

In their public hearings, CMOs emphasized college attendance and holistic student approaches. Each of the ten CMOs named college attendance as a fundamental goal of their organization. In one illustrative example, an RL2 representative expressed that the CMO's goal was to "provide a challenging academic and character development program that will ready graduates to enter and succeed in college." In addition to instances where college was explicitly

stated, seven CMOs described opportunities that were intended to enhance students' college preparation, including early college attendance programs and blending learning approaches that developed self-directed learning. As CMO leaders rhetorically highlighted college in their presentations, they also emphasized holistic student support. Seven of the ten CMOs, representing all levels of organizational status, explicitly described their work as "serving the whole child." For example, the school leader with ML2 stated, "We teach the whole child. We are implementing social emotional learning." Other CMOs alluded to specific socioemotional supports, including representatives from GL1 who described how its behavior toolkit gave "children tools to resolve problems and manage emotions." Overall, regardless of their legitimacy status, Birchwood CMOs appealed to policymakers by emphasizing their college preparatory programs while half of the population depicted themselves as balancing challenging academics with social and emotional supports.

CMO leaders also emphasized their community connections in board member engagement. Five CMOs (e.g., RL2, GL1, GL2, ML1, ML2) highlighted how they partnered with external organizations, other charter schools, or BUSD to demonstrate their collaborative orientations. In one representative example, the CEO at GL1 detailed the CMO's partnerships with community-based organizations and health clinics to illustrate their deep commitment "to making sure that we work with Birchwood to make a quality preK-12 pipeline." In her comments and those conveyed by the other 4 CMO leaders, leaders demonstrated how they worked in service of or in partnership with Birchwood to improve outcomes. The emphases on partnership were bolstered by characterizations of CMOs as contextually-responsive, community-based organizations. For instance, in one public hearing for a new charter school, a leader at RL2 argued, "We are local. We are a Birchwood organization. We are not a faceless, huge corporation. We are a local group growing." Similarly, GL1 presented themselves as a community organization in their public hearing by describing themselves as having "deep existing relationships with community partners and an established reputation in the neighborhood." Overall, half of the CMO population emphasized its connections to the local community in policymaker outreach. With Birchwood's history and its skepticism of interlopers, this tactic enabled CMOs of varying legitimacy statuses to align themselves with Birchwood's affinity for grassroots organizations. In addition, it identified CMOs as community members rather than outsiders, which their privatized form of governance might convey.

Race in policymaker engagement. CMOs utilized explicit and implicit racial messaging in their policymaker engagement. Below, I describe how CMOs deployed racial discourse with local board members and examine the racial narratives that were conveyed in that process.

Explicit racial messaging. CMOs included descriptions of students, communities, and organizational efforts that were stated in explicit racial terms. In their slides and presentations, CMOs made a total of 89 references to specific racial groups, communities of color, or minorities. Sixty-six percent of these references were made in describing student demographics while an additional 16 percent were made in describing academic performance by racial subgroups. Most of the remaining references to race were made when CMO leaders mentioned their efforts to diversify their student or teacher populations. To illustrate, a staff member at ML2 offered a racialized description of the school's faculty: "We have a diversified staff. It's a staff that reflects the students of Birchwood. This enables us to better serve all of our students. Ten of 19 teachers are persons of color, and eight are African Americans." In another example, BUSD board members questioned those at GL2 on student and teacher diversity. Upon being asked about their low number of African-American students, a GL2 leader stated that the organization

“had hired community organizers who are going to focus on the African-American community” while calling attention to progress GL2 had made in diversifying its leadership ranks. In these comments, CMO leaders used explicit racial references to quell board members’ concerns about the exclusion of African-American families from the charter sector. These statements, which were offered by organizations of all legitimacy statuses, suggested that CMOs were willing to use explicit racial framing to respond to this race-based issue in the sociopolitical landscape.

In fewer occasions, three CMOs seeking to enhance their positioning in the CMO marketplace made explicit racial references in depicting the local community to justify the need for strong educational intervention. For instance, during its charter hearing, a CMO leader at GL4 read the following statement to board members:

Since 2002, the number of African-American men killed on the streets of Birchwood has nearly matched the number who graduated from high school. Seven hundred eight-seven Black boys and men in Birchwood were victims of homicide. During that same time, just 802 graduated ready to attend the state university.

In this example, the GL4 leader utilized explicit racial language, particularly around Black males, and tied race to the concepts of crime, life expectancy, and grim educational prospects. Similarly, a founding board member at GL3 provided a variety of statistics to describe the community need for schools promoting holistic student supports. Like the GL4 leaders, those at GL3 provided statistics related to race, poverty, violence, life expectancy, and educational outcomes to depict the community’s dire circumstances and the need for educational options. Finally, those at GL1 depicted the community context with the image in Figure 3.

Figure 3. Displayed Image in GL1 Presentation to Describe Community Context



After naming the racial composition of the neighborhood, GL1 leaders described its high levels of poverty, incarceration rates, gang activity, and television watching to delineate the challenges local families faced. In these instances, CMOs used explicit racial language to describe communities and justify their organizational position. Yet, in doing so, CMOs pathologized the urban spaces in which their schools were located by circulating depictions that tapped into public imaginaries of the “urban jungle” (Leonardo & Hunter, 2009, p. 154), or a space characterized by criminality, danger, and depravity.

Implicit racial messaging. CMOs also deployed implicit racial messaging to policymakers in a variety of ways. Primarily, CMOs indexed race through visual imagery embedded in PowerPoint presentations. Of the 16 slide presentations analyzed, 14 contained prominently displayed images of students, parents, or teachers of color on one or more slides. Visual innuendos to race was also accomplished through student and parent testimonials during presentations or public comment, which were strategies deployed in each of the 16 presentations. Thus, while CMOs employed explicit racial references in several instances, these visual cues allowed them to implicitly discuss their work through a racial lens without naming it as such during other portions of their presentations.

Beyond visual racial references, CMOs described their students and communities with income-related modifiers (e.g., low-income, high poverty, qualify for free/reduced lunch) in 59 instances and with deracialized modifiers (e.g., underserved, inner-city, first generation) 81 times. Eighty-seven percent of the income references CMOs made were done to describe their student populations or when discussing student performance by subgroup. The remaining income references and deracialized descriptors were stated as CMOs described their missions. To illustrate, when describing their rigorous academic programming, leaders at ML2 stated, “Our mission is to empower inner-city students to be different and stand out from their community peers.” Here, the term “inner city” is a euphemism used by ML2 leaders to describe its majority-minority student population. Leaders at RL1 opted for another euphemism, “underserved,” in the vision statement they presented to the board: “RL1 exists to prepare all students, especially those who have been traditionally underserved, to successfully enter a high performing high school, with the ultimate goal of being admitted into a four-year college.” Whether it was conveyed in describing student performance, student demographics, or organizational missions, each of Birchwood’s CMOs utilized a range of deracialized modifiers in policymaker engagement, which competed and coexisted with explicit racial frames. The simultaneous espousal of these modifiers minimized the prominence and relevance of race in CMO messaging.

Birchwood CMOs also made several references to restorative justice in their policymaker engagement, which served as a way to implicitly discuss their work in relation to marginalized racial groups. Like many urban school districts around the country, restorative justice had been promoted as a culturally responsive behavioral management approach in Birchwood schools, particularly for Black males. In describing their management approaches, five CMOs (e.g., RL1, GL2, GL3, ML1, ML2) discussed their adoption of restorative practices. For instance, during ML2’s petition hearing, their dean of culture stated that its staff had “combined high expectations with nurturing support through character development, social and emotional learning, and restorative justice practices.” Given the local policy context and ML2’s student population, this allusion to restorative justice indexed race for BUSD board members. Other CMOs more explicitly tied race to restorative practices. When questioned on how they served their African-American student population, a GL2 school leader stated, “We are thinking about how we serve our existing students and families well. In the past couple of years, we have adopted restorative justice efforts with both our students, staff, and families so that everyone is involved in this collective decision-making process.” Here, the GL2 leader discursively tied race to this disciplinary approach by responding to the question about serving their African-American population with a reference to restorative practices. Similarly, after describing the demographic composition of the school’s neighborhood, a leader at GL3 named restorative practices as a key intervention by stating, “Restorative justice practices improve academic outcomes for students of

color.” Overall, references to restorative justice were an additional way that CMOs implicitly referred to race in the context of their work.

Summary. To secure the support of policymakers, CMOs emphasized organizational features that demonstrated their effectiveness and legitimacy. In these efforts, they also rhetorically appealed to policymakers by emphasizing their community connections, which buffered critiques from local stakeholders who distrusted outside agencies and favored homegrown organizations. In this context, race operated in both an explicit and implicit manner. With board members, race operated as a political resource that CMOs selectively deployed when they deemed it appropriate given the racial norms and issue topics. Yet, explicit racial language coexisted and competed with deracialized frames. In using an array of implicit racial references, CMOs conformed to colorblindness and minimized the centrality of race in their work.

Teacher Engagement: Implicit Racial Frames Despite Diversification Efforts

CMOs sought to secure the support of teachers through a range of strategies. In recruiting prospective employees, CMOs posted job openings on career websites and maintained webpages dedicated to describing their current teaching staff, common practices, and professional culture. CMOs also engaged in an array of relational strategies that would allow interested teachers to learn about the organization. For instance, five of the ten Birchwood CMOs held recruitment events at colleges and job fairs throughout the region and country. Four CMOs sponsored meet-and-greets or happy hours, and three others hosted open houses, giving teachers the opportunity to explore school sites. To promote these events, CMOs circulated event flyers via social media and their own organizational websites. A subset of this prospective teacher outreach focused on recruiting individuals for alternative teacher pathway programs, which four of the ten CMOs (e.g., GL2, RL2, GL5, and ML1) had recently launched. These four CMOs publicized their programs and held in-person events to recruit candidates to apply for these apprenticeship-based credentialing opportunities. Overall, to persuade teachers to join CMO coalitions, leaders implemented an array of virtual and in-person approaches to engage interested candidates.²³

Themes in teacher engagement. In their appeals to teachers, five CMOs (e.g., GL1, GL2, GL4, GL5, ML1) emphasized their collaborative organizational cultures. For instance, in describing their core value of “team” to prospective teachers, GL4 stated, “We build relationships and collaborate; we are trustworthy, and we contribute to a positive team spirit.” Similarly, GL1 described their professional culture in the following way on their webpage: “We are a team. We plan together in grade levels, observe and analyze each other’s lessons, collaborate with our instructional coaches and site leaders, partner with our families, and make decisions about our school site.” Alternatively, GL5 provided prospective teachers a window into their collaborative culture by sharing an embedded video of their teachers engaging in planning periods that included feedback sessions. Through these representative examples, Birchwood CMOs appealed to teachers by describing collegial work environments.

While collaboration was emphasized in teacher appeals, CMOs more frequently discussed professional learning and how their organizations enabled it. Professional learning was

²³ While the majority of teacher-related outreach focused on securing a new work force, four CMOs employed efforts to engage current teachers. These CMOs held appreciation events or circulated public celebrations of their dedicated work forces. To illustrate, RL1 held an annual teacher appreciation night to honor its teachers, which was announced, documented, and circulated via websites and social media. As an alternative approach, ML1 recorded professional videos of central office staff sharing their teacher appreciation and posted these videos on the web.

explicitly stated by six of the ten CMOs (e.g., GL1, GL2, GL4, GL5 ML1, ML2) in their teacher materials. For instance, ML1 suggested that their teachers were “never satisfied with the status quo and believe that we can always do more and do better. Teammates regularly use data to learn and grow as professionals.” GL4 provided a similar description of this goal: “We give and accept feedback and exhibit a growth mindset; we reflect on our work and engage in ongoing learning and growth.” In emphasizing collaboration and learning, CMOs seeking to enhance or maintain their organizational status appealed to teachers through the language of professionalism, which they believed would resonate with ideal teacher candidates.

Race in teacher engagement. Unlike policymaker engagement, CMO teacher outreach was characterized almost exclusively by implicit racial messaging. Most commonly, CMOs visually alluded to race through professional images or videos that featured students, teachers, or families of color. Of the 68 teacher-related documents and videos analyzed in this study, 51 of them contained a prominent image indexing race. At the same time, teacher marketing materials only contained three references to race or racial groups. In one of these instances, ML2 described their ideal teacher candidate as one “committed to working with educationally underserved students (95% are students of color; 75% are eligible for the free and reduced price meals program).” In this example, attention to race with the phrase “students of color” co-existed with income references and the deracialized modifier “underserved,” subsuming race amid other competing modifiers. In a second instance, GL1 shared a promotional video on one of its teacher-focused webpages wherein a Black parent expressed her support for GL1’s diverse staff. She stated, “They need to see positive role models, particularly men and men of different colors.” While this reference was included by CMOs in their outreach video, the parent stakeholder is the conveyer of this racialized language in her reference to “men of different colors,” suggesting that they rely on their constituents of color to refer explicitly to race. All in all, Birchwood CMOs made few explicit racial references but consistently alluded to race through visual means, indexing marginalized racial groups in the context of their work.

In contrast to the three explicit racial references made in teacher outreach materials, CMOs utilized deracialized descriptors (e.g., underserved, diverse) at total of 31 times when describing their students. To illustrate, GL5 utilized the term “underserved” in soliciting teacher recruits: “We seek teachers who are passionate about teaching, learning, innovating, and making a difference in traditionally underserved communities.” While most CMOs used one-word deracialized modifiers like GL5, GL3 included a more nebulous student description in its teacher outreach: “We expect our teachers to contribute to our goal that every student will thrive academically and develop the capacity to successfully compete in the local and global economy, regardless of their previous preparation and background.” This final phrase, “regardless of their previous preparation and background,” as well as references to underserved students can be interpreted as coded racial references given race’s visual presence on teacher outreach materials.

A final way that CMOs used implicit racial messaging was through references to equity. While avoiding explicit racial language, five CMOs (e.g., GL1, GL2, GL3, GL4, ML1) emphasized equity and its relationship to teachers’ work. For example, GL4 expressed: “We seek people who relentlessly pursue our mission, who are dedicated to a collaborative culture, and who promote an environment of diversity, equity, and inclusion.” While the previous example identifies equity broadly, other CMOs included phrases in their equity statements that provided a lens into how the organization was defining the concept. For instance, ML1 stated, “ML1 was founded to address the long-standing inequities in K-12 education. Our founders believed in creating high-quality public school options in low-income neighborhoods and communities

which have historically lacked access.” Here, equity is discursively linked with poverty-related impediments, suggesting that the CMO is conceptualizing equity through a class-based lens. GL3 invoked the concept of equity in a different fashion. The CMO stated, “GL3 seeks to transform young people into agents of social change through high quality education in a broader effort to transform the neighborhood without displacing legacy residents.” Here, GL3 invoked the idea of equity through references to nurturing student agency while alluding to gentrification processes that were occurring in many Birchwood neighborhoods. Overall, to enhance or maintain their legitimacy with teacher candidates, CMOs deployed equity frames, but did so broadly or in a deracialized manner that alluded to other dynamics. Despite how the references were made, prospective teachers could interpret equity through a racial lens given the saturation of teacher outreach materials with images of people of color.

Summary. As CMOs engaged teachers through web-based and relational means, they described their organizations as collaborative work environments that nurtured professional learning. In these efforts, race operated implicitly, primarily through the use of visual imagery, which in turn, colored interpretations of student descriptions and equity references. Conversely, explicit racial references were rare despite CMOs intent to recruit more teachers of color onto their coalitions. In this way, CMO teacher engagement used colorblind discursive tools, but conveyed them alongside the positive connoted idea of equity as a symbolic resource. With this rhetorical move, CMOs followed the pattern established by education reformers in previous policy waves, who sought to garner multiracial coalitions through the use of coded appeals that advanced ideas that would resonate with people of color and progressive constituents.

Parent Engagement: A Deracialized Approach with Civil Rights References

To engage parents, CMOs used a variety of relational strategies and communication channels. Interviews with CMO leaders and document analysis of charter petitions revealed that these organizations relied upon particular forums to disseminate information to a diverse parental audience. For instance, each of the ten CMOs described the circulation of advertisements and articles in media outlets and the posting of flyers in local businesses, community centers, and religious institutions. Each CMO also described outreach tactics that enabled them to speak with parents about their organizations. These relational strategies included individualized recruitment efforts (e.g., canvassing target neighborhoods, booths at festivals or local businesses) and conducting public presentations (e.g., open houses, information sessions at churches or community centers). Six of the ten CMOs also mentioned how they developed or leveraged relationships with community leaders such as pastors and local business owners as an avenue for building community trust. Finally, each CMO hosted community events (e.g., potlucks, ribbon-cutting ceremonies, community meetings) for parents as social and informational gatherings.

Themes in parent engagement. CMOs emphasized programmatic and logistical information in their parent outreach. For each CMO, parent materials included information related to enrollment, lottery processes, and admissions preferences (e.g., sibling priorities). In the case of seven CMOs, the materials detailed norms around parent participation and opportunities for parent leadership in spaces like school site councils. CMO parent materials also provided details about school programming. Here, eight CMOs described their pedagogical models and content emphases (e.g., STEM education, blended learning, performance assessments, wrap-around supports). In describing their school designs, CMOs emphasized themes related to school culture and college preparation. To illustrate, GL5 stated, “A college-going culture is embedded in our curriculum, academic support programs, and school activities.”

In a second example, RL1 described their model: “Our commitment to high expectations in attendance, academic achievement, and character development results in our students being prepared for lifelong success.” Overall, to elicit parent support, CMOs of varying organizational status provided prospective parents with information that enabled them to learn about CMO schools and the necessary steps required to join the CMO’s constituency.

To pique parents’ interest, CMOs included data sources to support their descriptions of school culture and programming. For instance, in describing their technology-based learning approach, GL5 included the following quote from a Latino student in their materials: “GL5 taught me how to deal with obstacles and how to succeed in life. Most importantly, it taught me how to believe in myself.” A parent of a student enrolled in ML2 provided her own perspective on ML2’s rigor and school culture: “When I was researching middle schools for my son, I learned about ML2. I appreciate the structure the school provides him and the extra time he spends with the teachers.” In both instances, these testimonials provided anecdotal data that prospective parents could use to evaluate the CMO. In addition to testimonials, four CMOs listed test scores and the universities in which their alumni have matriculated to highlight their academic outcomes. Three of the ten CMOs also cited research to support their claims. For example, RL3 stated, “Increasingly, research has shown that music ‘rewires’ the brain and enhances learning in all areas. Music has also been shown to improve health and encourage cooperation and self-discipline.” In sum, as CMOs sought to foster parental support, they emphasized themes related to school programming and utilized data to support their claims.²⁴

Race in parent engagement. While CMOs acknowledged race in designing parent recruitment, the materials they circulated eschewed explicit and implicit racial language. Of the 48 flyers, webpages, and advertisements targeting prospective parents, four contained references to specific racial groups, typically in congress with a graph detailing the demographic composition of the CMO school. While this pattern aligns with those seen in other forms of CMO engagement, parent outreach differed in its minimal use of income or deracialized modifiers. CMOs invoked income related and deracialized terms (e.g., diverse, underserved) only four times in these materials. Furthermore, visual racial messaging, which was prevalent in CMO engagement efforts, was less pronounced in parent recruitment. Specifically, 18 of the 48 materials targeting parents contained a prominent image of a person of color. Overall, while other forms of CMO outreach included a variety of implicit and explicit racial cues, parent engagement materials understated race visually and textually in comparison and thus, presented a more deracialized picture of the CMO. Given that these materials were likely intended for parents of color, CMOs appeared to eschew descriptions of their constituents in parental outreach, which could be interpreted by their target audience as deficit-laden or paternalistic.

CMO personnel followed suit in eschewing implicit and explicit racial references at parent engagement events. At the same time, race was visually indexed at these events by virtue of the parents in attendance and the students who typically engaged in some sort of performance or gave rehearsed speeches. Beyond the visual presence of race, CMO constituents articulated

²⁴ While much of the data I amassed targeted prospective parents, a subset of the materials and observations included those intended for current CMO families. In engaging current families, CMOs circulated monthly newsletters and made announcements on social media and parent webpages. Unlike the materials intended for prospective parents that included descriptions of school culture and programming, outreach materials for current parents provided logistical information about school functioning, student deadlines, and upcoming events. For instance, parents were informed about report card dissemination, upcoming performances, athletic events, and school fundraisers.

social justice frames that had racial subtexts in their public statements for families. For example, at a GL2 community event, the school leader emphasized that students and families were “history makers.” She stated, “Like those that came before you, you are learning to be a change maker. That means that you are going to make the world to be the way you want it to be for your family, your community, and the entire world.” In referring to “those that came before you,” the school leader subtly alluded to the city’s activist legacy—a history that would likely conjure knowledge of community leaders who identified with race-based social movements for local stakeholders. A community member and ML2 supporter made more explicit allusions to Birchwood’s activist history at a ceremony celebrating the school’s relocation to a facility that had previously been a BUSD school in one of the city’s storied Black neighborhoods. During her remarks, she referred to a prominent civil rights leader in this statement: “[*Samuel Haynes*] walked the halls of this school and died in our streets. Your children will now walk these halls and continue his legacy.” Like the GL2 principal, this speaker emphasized how ML2 students were future leaders who have the capacity to transform their community. Yet, she deviated from the GL2 principal by alluding to a specific leader, Samuel Haynes, who was a local civil rights activist associated with his work in the Black community. The invocation of Haynes’ name conjured the idea of the race-based Civil Rights Movement and in doing so, politically and symbolically aligned ML2 in the quest for civil rights.

Summary. In soliciting parental support, CMOs of all legitimacy statuses provided parents with information about school programming, school effectiveness, and enrollment. In emphasizing this content, CMO parent outreach was deracialized in that it was devoid of the explicit and implicit racial references that characterized other forms of CMO engagement. Yet, at organized family gatherings, CMOs did allude to Birchwood’s civil rights legacy, which served as an implicit racial reference for local Birchwood audiences who would associate these statements with racial equity causes. In making these references, CMOs symbolically aligned themselves with Birchwood’s history of community activism and the sense of social consciousness that many of its community members still maintained. Thus, like its efforts with teachers, CMOs used implicit racial references positively as a symbolic resource to foster multiracial coalitions in a manner that suggested its equity orientation.

Funder Engagement: Colorblind Approach with Deficit-Laden Tropes

CMOs who sought to maintain or gain legitimacy in the local charter marketplace employed individualized and formal strategies to engage donors in their efforts.²⁵ An overarching strategy these seven CMOs used was to maintain webpages that provided information to current and prospective funders. These webpages included descriptions of the ways to donate (e.g., gift of stock, wire transfer, event sponsorship), online donation portals, lists of current sponsors, and in fewer occasions, links to downloadable flyers regarding corporate sponsorship. In addition to these web-based approaches, CMOs also engaged in individualized recruitment efforts to secure funder support. In interviews and board meetings, CMO leaders described funder solicitation as “relational work” that involved one-on-one meetings with foundations and individual funders. Interviews and observations revealed the importance of CMO board members in this relational work as they were often encouraged to leverage their social, political, and economic networks to solicit increased financial support. Finally, four CMOs held annual events or galas to engage donors. CMOs provided details about these events

²⁵ RL1, RL2, and RL3 did not host publicized events or maintain online forums for donors. The evidence presented on CMO funder engagement is based on the evidence I amassed for the remaining CMOs.

on their websites, including photo galleries or videos with highlights of previous events and details for the upcoming year. These fundraisers had a formal program with predetermined speakers and performances and included auctions of donated items solicited by CMO leaders.

Themes in donor engagement. Each of the seven CMOs emphasized college attendance in describing their organizations to donors. In one representative example, ML1 described its work in the following way: “At ML1, we are changing the odds for our students. Through our College Guaranteed mission, we’re helping our students create life opportunities for themselves, their families, and their communities.” In this statement, ML1 explicitly stated its college focus and alluded to future opportunities that their high-quality schools can nurture. While still emphasizing the college theme, two CMOs (e.g., GL2, ML2) were explicit in their discussion of career preparation in funder documents. For instance, one ML2 flyer suggested that donors should invest in their schools to “help build a college-educated workforce, while developing in our students the skills needed for your future talent pool.” In using market-oriented terms like “workforce” and “talent pool,” ML2 underscored its commitment to students’ career preparation.

As CMOs discursively emphasized college and career, they also advanced a distinct theme for funders—getting a “return on your investment.” On their websites and flyers, three CMOs presented statements regarding how individual and corporate sponsors could benefit from charitable donations. For example, in their flyer advertising their annual gala, GL4 offered donors media exposure and brand displays for their support. They stated, “Publicity from 2014’s GL4 Gala reached over 8,000 over social media and mailing list contacts.” In presenting data from the previous year’s event, GL4 appealed to sponsors’ appetite for good publicity and brand recognition. ML2 presented a more extensive list of how corporate sponsors, in particular, could benefit from investing in their organization. The list included “fostering a culture of philanthropy and volunteerism,” “increased brand reputation and customer loyalty,” and “gaining access to exclusive ML2 events.” ML1 also provided incentives to solicit large donations. Specifically, ML1 stated that corporations willing to provide \$50,000 to sponsor one of their fundraisers would be assigned a “sponsored classroom with teacher updates,” or have a “ML1 student band performance at your corporate event.” Through these incentives, CMOs offered the time and services of their teachers or students as a reward for significant investment. In this way, CMOs commodified their constituents and made their services a resource that investors could use to serve their corporate interests.

Race in funder engagement. Amid these emphases, CMOs deployed distinct racial discourse patterns. Like other forms of stakeholder engagement, race was typically indexed visually with accompanying deracialized modifiers of student populations and communities. Of the 33 documents or promotional videos intended for donor audiences, 22 contained prominently displayed images of or testimonials from students or families of color. In the context of these visual racial cues, CMOs described their students with income-related ($n= 11$) or deracialized modifiers ($n= 10$). For example, GL4 described its work in the following way: “Our mission is to transform the lives of students—especially those who will be the first in their family to attend college—by preparing them for success in college, in careers, and in life.” On this flyer, GL4 used the deracialized phrase “first in their family to attend to college” alongside a prominent image of a student of color to frame its work. In another example, GL1 stated their mission:

[T]o provide a superior public education to Birchwood’s most underserved school communities by creating a system of public schools that relentlessly focuses on our students’ academic achievement. Our schools have an average of 95% of students

qualifying for free and reduced lunch and are located in Birchwood neighborhoods that have high levels of violence and poverty.

Alongside racial imagery, GL1 used the deracialized term “underserved” and made income references in their allusions to free and reduced priced lunch status and poverty to describe their work to donor audiences. In contrast, CMOs only included explicit racial language in their donor materials three times. In one instance, GL5 used the phrase “teachers of color” to seek donations for their teacher pathway initiative to diversify their workforce. In another example, ML2 named explicit racial groups when presenting the following statistic: “Only 20 percent of Latino and African-American students who graduate high school in the Bay Area are eligible to attend a four-year college.” In this last example, ML2 named specific racial groups in the context of alarming statistics to persuade funders of the need for strong educational interventions, which ML2 could provide. Overall, materials intended for donor audiences were similar to other forms of CMO engagement in their implicit and visual references to race. They visually signaled that the organization served students of color, yet generally conformed to colorblind tactics that avoided naming race in the context of the work.

At funder events, CMOs used racial messaging in similar and contrasting ways. On one level, CMOs maintained the use of implicit racial references. CMO leaders and affiliates used words like “low-income,” “underserved,” and “first-generation” to describe CMO students and families. Despite the avoidance of racial modifiers, race remained visibly present at fundraisers through the use of testimonials. Each of the galas held by four CMOs—ML1, ML2, GL2, and GL4—included a formal program of speakers wherein constituents were asked to share their experiences with the attendees. When providing their statements, students and parents—who were exclusively Black or Latino—served as the visual reminder of race in the room.

At the same time, donor engagement was distinguished by the presence of deficit-laden characterizations of CMO constituents and communities, which were exclusively articulated through testimonials. In each of the seven testimonials that were analyzed, the speakers described their personal experiences through deficit frames before sharing how the CMOs had changed their life trajectories. For instance, a Black female alumna from ML1 described herself as a young student: “When I was 13, I had a lot of bad habits. I was resistant, lazy, and downright unresponsive. But the ML1 teachers never gave up on me.” While these modifiers are self-imposed, this description nonetheless taps into urban imaginaries, particularly of Black students, as unruly and in need of taming, which as her comments belay, the teachers and staff were able to do. Other students shared their personal stories and pathologized urban spaces in the process. A representative example can be seen in the comments shared by a Black male alumna from ML2 at their annual fundraiser: “Our society has so many gifted and talented children living in the worst neighborhoods.... I had an amazing father who gave me the tools for success. ML2 gave my father the foundations to my goals and dreams.” Here, the student of color presented a negative characterization of his local community with the adjective “worst,” which was substantiated in the full context of his words where he referred to gangs, crime, and poverty to describe his childhood upbringing. Next, while he gave his father appreciation, his words indicated that the CMO was the actor that provided the foundational support, depicting students and families as deficient and making the CMO the change agent. Overall, through testimonials, CMOs asked their constituents to share their challenging personal narratives, and in doing so, made students and parents of color the conveyers of deficit-laden tropes that tapped into imaginaries of urban spaces for primarily white, wealthy, and non-Birchwood constituents.

Summary. In their donor engagement, CMOs emphasized their focus on college and career preparation and described the various ways donors could obtain a return on their financial investment. In this process, they commodified their constituents by offering teachers and students as resources in return for financial gains. Discursively, CMOs employed colorblind messaging in their funder engagement. They alluded to race visually or through deracialized modifiers to implicitly discuss race in the context of CMO work. Through testimonials, CMOs also advanced individualistic narratives of students beating the odds while derogating communities and their constituents with deficit-laden subtexts. In this context, CMOs seeking to gain or maintain their legitimacy conformed to the linguistic and narrative devices of colorblindness for donor audiences who held political, economic, and racial power.

Assessing CMO Coalition-Building Efforts for Varied Audiences

Table 5 summarizes the patterns CMOs displayed when engaging stakeholder groups. In their coalition-building efforts, CMO deployed a range of behaviors to engage their key audiences. For policymakers, strategies included individual meetings, formal presentations, and site visits. To engage teachers, CMOs used web-based communication and held events that enabled teachers to learn more about their organizations. In their parent engagement, CMOs employed individual recruitment, web-based communication, and community events. Finally, CMOs individually engaged potential and current funders through meetings and formal events like galas and luncheons. Overall, CMO leaders and staff sought to build support for their organizations through formal and informal means.

In these efforts, CMOs emphasized varying themes that would resonate with their target audience. For policymakers, CMOs discussed their organizational programming and effectiveness to argue for their charter authorizations. They also highlighted their collaborative orientation and community roots to demonstrate their connection to Birchwood, which aimed to quell policymakers' concerns related to outside governance. With teachers, CMOs accentuated how their organizations fostered professional learning and situated their work in the alleviation of persistent inequities. For parents, CMOs highlighted school programs to provide a window into the impact a CMO could have on their child's academic and personal future. Finally, with donors, CMOs emphasized future preparation and how their fiscal investment could benefit funders or their economic prospects. When considered collectively, the data suggests that CMOs strategically varied their rhetorical themes to address the perceived interests of their constituents.

The racial messaging CMOs used in stakeholder engagement displayed some convergent patterns. CMOs generally eschewed explicit racial references in their outreach efforts. For teachers, parents, and funders, CMOs made few references to race, communities of color, or specific racial groups. Policymaker engagement was an exception as CMOs made more explicit references to race in this context. Given policymaker concerns regarding the marginalization of Birchwood's Black community in charter and CMO populations, CMOs' explicit attention to race in securing the support of local school members could be understood as strategic. In addition, CMOs consistently deployed colorblind messaging in a variety of ways. In each context, CMOs indexed race through visual imagery, implicating race in CMO work. In the context of these visual references, CMOs used implicit racial language when discussing their school communities. With parents, CMOs invoked local history to conjure race for these stakeholders. With other audiences, CMOs utilized modifiers like "underserved," "low-income," and "urban" to describe their populations. Because these modifiers were advanced with

persistent racial imagery, they enabled CMOs to discuss their work with marginalized communities of color without naming race in the process.

Table 5. CMO Engagement Strategies, Common Themes & Racial Discourse Patterns by Target Audience (interviews = 15; documents = 410; observations = 26 hours)

Audience	Engagement Strategies	Common* Themes	Race in Stakeholder Engagement	
Policymakers	Site visits, one-on-one meetings, charter petitions, public hearings	<ul style="list-style-type: none"> • Programming • College • Whole Child • Community Roots • Collaboration 	Explicit^	<ul style="list-style-type: none"> • Student descriptions • Diversification • Neighborhood characterizations
			Implicit^	<ul style="list-style-type: none"> • Visual images • Income & deracialized modifiers for students & mission • Restorative justice
Teachers	Websites, Job fairs, Meet-and-Greets, site visits, social media, flyers	<ul style="list-style-type: none"> • Professional learning • Collaborative environment 	Explicit^	-
			Implicit^	<ul style="list-style-type: none"> • Visual images • Income & deracialized modifiers for students • Equity
Families	Potlucks, ribbon cutting, community meetings, websites, individual recruitment, flyers	<ul style="list-style-type: none"> • School program • Performance • Parent participation norms • Logistical information 	Explicit^	-
			Implicit^	<ul style="list-style-type: none"> • Visual at community events • Civil rights
Donors	Websites, school site visits, videos, board member solicitation, fundraisers, flyers	<ul style="list-style-type: none"> • College & career preparation • Return on investment 	Explicit^	-
			Implicit^	<ul style="list-style-type: none"> • Visual images • Income & deracialized modifiers for students • Beating the odds • Deficit characterizations

*I identified a theme as common if five or more CMOs displayed the pattern.

^Explicit = specific racial groups, race, minority, communities of color; Implicit = low-income, underserved, diverse, urban, first generation

While maintaining these similarities, CMO racial discourse deviated with regard to the narratives that accompanied implicit and explicit racial references. With teachers and parents, CMOs advanced ideas of civil rights and equity amid their coded racial appeals. In doing so, they discursively tied race to positively connoted frames that would resonate with their teacher and parent audiences. Conversely, when engaging policymakers and funders, CMOs advanced subtle derogating narratives within their racial messaging. With policymakers, CMOs indexed race through references to restorative justice—a discursive move that conjured images of students of color in the context of behavioral management, tapping into broader conceptualizations of these racial groups as in need of control. In addition, CMOs also pathologized communities by naming race in the context of negative statistics related to crime, poverty, and other forms of depravity to justify educational intervention. With funders, CMOs advanced deficit-laden tropes amid their implicit racial appeals. Through the use of testimonials, CMOs prompted their stakeholders to share their personal narratives, which characterized students and families as passive and deficient and negatively depicted urban spaces. Moreover, in having their constituents convey these narratives, CMOs distanced themselves from these stories and positioned the organization and its donor base as change agents. The patterns displayed by CMOs in policymaker and donor engagement adhere to colorblindness and reify this way of thinking about race relations. In their messaging, CMOs typically eschewed explicit racial references, naturalized patterns of inequity, and distanced themselves from the perpetuation of the racial status quo. As CMOs semantically distanced themselves from these negative racialized perceptions, they nonetheless showcased these ideas alongside their efforts to create a positive public image.

Racial Politics and CMO Coalition Building

In developing engagement strategies, CMOs varied in the degree to which they considered race. On one hand, Birchwood CMOs acknowledged and named race with regard to student and teacher diversity. CMOs developed strategies to diversify their student base and to combat the disproportionate exclusion of the city’s African-American population in the local charter sector. As an additional appeal to Birchwood parents, CMOs also sought to hire and retain staff of color who could increase the organization’s cultural responsiveness. While willing to consider race in these contexts, CMOs were reluctant to name racial equity as a fundamental goal of their work or in funder solicitation. As CMOs honed their missions and elevator pitches, they questioned if or how race should be stated and ultimately eschewed explicit references for euphemisms. While CMOs varied in foregrounding race in strategy development, coalition-building efforts and their accompanying discourse minimized explicit racial references. Instead, CMOs deployed coded racial messaging in their engagement that enabled them to subtly allude to race in the context of their work without stating it. Furthermore, their implicit racial appeals were conveyed with narratives that would resonate with the values, interests, and ideologies of their target audiences.

With the strategic acknowledgement and use of race in CMO efforts, race and racial messaging can be understood as political and symbolic resources for Birchwood CMOs in their coalition-building efforts. To manage their perception, CMOs used race in a manner that would resonate with their target audiences and conform to the racial norms that their audiences maintained. Symbolically, they sought to diversify their staff and school population to increase their cultural congruence with local communities—an effort that would suggest that they were visually aligned with their constituents and were not outsiders imposing their agendas on local communities. Furthermore, their allusions to equity and civil rights also carried symbolic weight

for the target audiences who maintained equity commitments. These racialized tactics also served political purposes. Explicit discussions of CMO diversification with BUSD board members buffered critiques emanating from the local political context. In this way, CMOs strategically considered and acted upon racial strategies to position their organizations favorably in the local charter market.

At the same time, the varying manner in which CMOs used race in coalition building generated competing and incompatible racial frames that complicated their attempt to align themselves with racial equity causes. To compete in the saturated charter context, CMOs engaged in outreach tactics with a wide range of stakeholders who differed in background, interest, and societal values. To sell their brand to these disparate actors, CMOs crafted subtle, racial narratives that aligned with what they believed those stakeholders would value. For teachers and parents, these narratives included positively connoted ideas. For funders and policymakers—stakeholder groups who maintained financial, political, and racial power—CMOs or their constituents articulated deficit-laden messaging that reified negative understandings of racial groups and undermined the community responsiveness that many CMOs sought to nurture. All in all, the competitive processes inherent in charter reform were acutely felt by Birchwood CMOs who operated in a saturated charter context and unique sociopolitical environment. To sustain their organizations and successfully build coalitions, they crafted and circulated competing rhetorical frames that had implications for their equity orientation.

Chapter 8: CMOs, Legitimacy Management, and the Racial Politics of Coalition Building

The Birchwood CMO population displayed distinct political and racial patterns in their coalition-building practices despite key differences in organizational size and pedagogical approach. While patterns were evident among CMOs, the holistic case study analysis suggested that organizational behaviors were affected by one criterion: a CMO's legitimacy status. To secure resources, CMO leaders act strategically to foster or maintain legitimacy, or the perception that their organizations are acting in desirable and appropriate ways within socially constructed norms and values (Suchman, 1995). Stakeholders evaluate CMOs to assess how they conform to acceptable educational practices and office operations. The appropriateness of their actions is also evaluated through a less recognized social construction in organizational theory: race. As CMOs engage stakeholder groups, they encounter audiences who maintain different values and racial commitments, which influence their interpretations of CMO actions.

This chapter provides an analysis of three embedded CMOs to illuminate the nuanced differences that exist among the subunits along this criterion. The cases are listed in Table 6.

Table 6. Embedded Cases for Analysis

Birchwood CMO	Legitimacy Status
RL1	Repairing legitimacy
GL2	Gaining legitimacy
ML1	Maintaining legitimacy

Beyond facilitating an exploration of the patterns within and across cases, this analysis exposes how an organization's status in the market influences coalition building and how organizations seeking to repair, gain, or maintain their legitimacy conform to local and national racial norms in these efforts. Drawing upon nine interviews, 28 hours of observations, and 217 documents,²⁶ I find that the CMOs displayed convergent patterns with many of the themes and discourses reflected in the broader CMO population. Yet, their legitimacy status influenced their behaviors in specific ways. Because of the obstacles it faced, RL1 focused its engagement and rebranding efforts on local and internal stakeholders while conforming to both local and broader colorblind norms. In trying to maintain its rootedness in Birchwood while expanding its reputation, GL2 displayed a higher degree of race consciousness in developing and enacting its coalition-building strategies but ultimately presented a colorblind external brand. In maintaining its status, ML1's strategies were developed and enacted in a colorblind fashion. Furthermore, they forewent racial and thematic messages that reflected a sensitivity to the local context and its constituents. I conclude the chapter with a discussion of similarities and differences among and within the cases and how they coalesced or contradicted patterns observed within the Birchwood CMO population.

²⁶ RPI= 2 interviews, 7 hours of observation, 42 documents; GL2 = 4 interviews, 9 hours of observation, and 68 documents; ML1= 5 interviews, 11 hours of observation, and 107 documents. Note that two interviewees had maintained affiliations with both GL2 and ML1.

Repairing Legitimacy: RL1

Organizations seeking to repair legitimacy do so in response to a critical incident that generated a loss of public trust (Suchman, 1995). To rebuild their reputations, leaders often restructure their organizations, create accountability systems, and generate new narratives to re-establish connections with key audiences. RL1 represents one such organization within the Birchwood CMO landscape. RL1 operates three schools in Birchwood, creating a K-12 pipeline within its organization. Since its establishment in the mid-1990s, RL1 has earned several distinctions for high student achievement levels, including frequent mentions in nationally acclaimed magazines and news outlets. Yet, the CMO's history includes multiple controversies. Scandals related to governing practices, fiscal mismanagement, and academic misconduct led to the temporary revocation of the organization's charter at one point. Opponents have criticized the organization for its disproportionate recruitment of Asian students who compose 58 percent of its student population, which has left the CMO open to criticisms related to racial targeting. To address these concerns, RL1 has undergone significant restructuring, including leadership transitions and the dissociation from individuals at the center of the controversy. Its leaders are currently drafting a strategic plan to improve its impact and brand reputation.

RL1's Nebulous Engagement Strategy Development

Interviews with RL1 leaders suggested that their leadership were aware of the need to refurbish their image in the Birchwood context. RL1's Executive Director (ED), a Black female who assumed the leadership position after the CMO's charter had been reinstated, mentioned: "Coming into RL1, I knew it was a challenge and that I would have to rebrand us and rework the narrative to actually show who we are now. We really are a different organization. We haven't sacrificed our quality, but some of the things that were not working at all, we have changed." When questioned on the areas that needed repair, each of the two RL1 leaders interviewed mentioned the CMO's reputation for engaging in harsh disciplinary practices and enrolling a large number of Asian students. In discussing these issues, the ED argued that she needed to dismantle these "misconceptions" for internal and external stakeholders. She explained:

Internally, there were people that thought they knew how things should be done, and it was sometimes on the more extreme side. So, we had to bring people back to center. Externally, there were people who thought they knew what we were about and how we were getting the scores. We literally had a board member say it's because of our Asian kids that we're getting the scores and we're, like, that's not okay, and it's not true.

In her comments, the ED indicated that RL1 needed to rebuild the perceptions of BUSD school board members and RL1 personnel in moving the organization forward.

While RL1 leaders expressed their desire to rebuild their brand reputation, there was little evidence as to how they sought to engage in that process. Because of the challenges RL1 faced over the last decade, their senior leaders spent the majority of their governance meetings attending to compliance and financial matters. Rather than developing ways to build rapport with stakeholders, they discussed basic school operations, student enrollment, and the implementation of programs that would amplify their strong academic record (e.g., after school programs, Saturday school). They also spent one-third of each board meeting in closed session with legal counsel about policy matters and facilities agreements, the latter being a source of tension given the CMO's history with conflicts of interest in this area. In terms of finance, RL1 officials

engaged in budget analyses, noting areas for which they would need to fundraise to compensate for projected deficits. While mentioning the need for fundraising in board meetings, the development of donor outreach strategies was left to senior leaders. Furthermore, unlike the patterns seen across CMOs, RL1 board members did not discuss leveraging their professional or social networks to increase donations. This siloed approach to funder engagement was palpable in this study as there was no evidence that RL1 held formal donor events nor did they maintain web portals or publicly accessible marketing materials for this stakeholder group.

While much of the time was spent attending to compliance and operational matters, RL1 officials did discuss teacher engagement broadly in governance meetings. Much of the conversation focused on current teacher development. During school updates, RL1 principals described professional development teachers were receiving to implement restorative justice practices. One of the middle school leaders mentioned that a BUSD expert was partnering with RL1 to institute these practices. Echoing his colleague, a high school principal detailed how his teachers were engaging in “deep learning experiences” with professors who were experts in “Critical Race Theory and context-responsive pedagogy.” In response to these professional development descriptions, a board trustee argued that to accomplish this goal, their schools “needed more men in the classrooms and teachers that represent the villages our children are from.” Through this comment, the trustee alluded to the need to recruit a more diverse teaching force that was congruent with their school population. Overall, the disproportionate attention to current teacher engagement aligns with the ED’s description of the CMO’s internal work that needed to be done to rebuild the organization, particularly around harsh disciplinary practices.

While RL1 officials engaged their workforce to address external critiques of their harsh disciplinary practices, there was little evidence that they were developing strategies to address the other major threat identified by RL1 staff: the concentration of Asian-American students in RL1 schools. Student enrollment demographics were not discussed at any of the observed RL1 board meetings. An analysis of CMO charter petitions, which required CMOs to describe how they would aim to attain racial and ethnic balance, broadly stated that RL1 would target “minority and socioeconomically disadvantaged students that reflected the BUSD student population” but included no details related to the types of strategies they would deploy beyond recruiting families in “various communities.” Furthermore, when questioned about parent recruitment during an interview, the ED mentioned they were conducting outreach via social media and leaning upon their waitlists and word-of-mouth networks to meet their enrollment projections. In interviews with other CMO leaders, these latter strategies had been identified as contributing factors to demographic homogeneity.

Given the issues this CMO faced, RL1 officials attended to basic operations in each of their governance meetings and delegated stakeholder engagement to their senior leaders. In doing so, there was little evidence of how RL1 developed these strategies beyond those targeting their current teaching staff. Furthermore, there was little deliberation or evidence that demonstrated how RL1 was addressing the concentration of Asian students in their schools through parent engagement that would reverse this trend.

RL1 Policymaker Engagement: Addressing External Threats with Mixed Racial Frames

To engage BUSD board officials, RL1 leaders held one-on-one meetings with sitting board members and conducted formal presentations to renew their charter contracts. Like the content in other CMO board presentations, RL1 representatives offered descriptions of their academic program and performance data, consistently expressing their “commitment to

excellence” and academic rigor. At the same time, RL1’s controversial history influenced its attentiveness to compliance issues in board presentations. Unlike other CMOs, RL1 leaders provided in-depth descriptions of how the CMO conducted financial and governance matters—two issues which had been at the center of the controversy.

In describing their school programming, RL1 officials referred to themselves as “a phoenix rising” and emphasized their new restorative and holistic orientation. In her opening remarks to the board during a hearing, the ED stated, “We are really about the whole child. You will hear things in the past that we focus only on academics. Our first tenet is family. We value being restorative and nurturing.” These sentiments were echoed in the comments made by a high school principal, a Black male, who discussed the implementation of restorative practices: “With our students, first and foremost, it’s not about being punitive but rather to help our students reflect on their decisions. We are dealing with whole child.” In describing how their organization was “moving to restorative progressively,” RL1 affiliates noted how the school was implementing extracurricular activities to provide students with a range of experiences. The aforementioned principal described the new activities that improved school culture including spirit weeks and proms. Several students also described RL1’s new school atmosphere during public comments, explaining how these activities made them feel like RL1 “was a traditional public school.” Through references to whole child supports, restorative practices, and fun-filled activities, RL1 representatives were attempting to change the perception of their schools as overly punitive to one that holistically addressed students’ developmental and social needs.²⁷

In their policymaker engagement, RL1 leaders utilized both implicit and explicit racial framing to describe their student populations. Like other CMOs, RL1’s references to restorative justice served as an implicit racial frame in the Birchwood context because of the reform’s recent proliferation across the city as a culturally responsive behavioral approach for Black and Brown students. In addition, RL1’s ED discursively tied race to restorative justice in the following statement: “The restorative work we are doing is to develop a strong citizenry across the American diaspora. Brown children, Black children, White children. We are making sure they come together in something positive.” In addition to restorative justice, RL1 leaders used deracialized descriptors (e.g., low-income, underserved, disadvantaged) a total of 32 times in board hearings. In one representative example, RL1 described its mission: “RL1 exists to prepare all students, especially those who have been traditionally underserved, to successfully enter high performing high school and ultimately a four-year college.” RL1 also visually indexed race on their PowerPoint slides with prominently displayed images of students of color and through student and family testimonials, which were included in each of its three presentations. The juxtaposition of deracialized modifiers with prominent images of people of color allowed the audience to interpret this discourse as coded racial language.

In the context of these implicit racial references, five of the eight student speakers conveyed narratives that circulated deficit-laden depictions of local communities. During RL1 charter hearings, students and families shared their personal stories and explained how RL1 had changed their life trajectories. To illustrate, a Latino alumnus of RL1 shared his story:

I spent a great share of my life in Birchwood, and I’ve experienced my share of gang violence, dealers and pushers, and helped my family members pick up the pieces as our home was robbed and vandalized. In this unpredictable world, stability and safety are

²⁷ Unlike other Birchwood CMOs, RL1 did not emphasize its collaborative orientation or its community roots. Conversely, it emphasized its “family” atmosphere that fostered an internal community and positive culture.

hard to come by. I quickly realized that the only escape from the reality of Birchwood was RL1...I can only be thankful to RL1 for creating an oasis in what was a fiasco.

Here, the former student characterized the community as crime ridden while suggesting that his RL1 experience provided his only reprieve from the harsh realities of daily life. In another example, a Latina alumnus shared the challenges she faced in illegally immigrating to the U.S. After describing her life of hardship and poverty, the student explained:

Because of a lighter, my family and I were able to arrive in the United States safely. RL1 has been my lighter. It has opened up my road to success and opened up opportunities for my family and me. Although at the time I did not understand RL1's model or their structured environment, I now understand that RL1 is there to educate minority students who would otherwise be destined for failure.

Here, the alumnus not only emphasized how RL1 is responsible for her success, but also openly stated that its structured approach changed the trajectory of minorities who would be "destined for failure." While the three student speakers emphasized RL1's staff commitment and academic support, these two examples were representative of the majority presented. Overall, these narratives were intended to personalize and illustrate RL1's work with students who come from disadvantaged backgrounds. In asking students to present their lived experiences, RL1 not only circulated derogatory depictions of local communities but also developed a justification for the community's need for RL1. In doing so, they advanced these descriptions, which contradicted their claims related to their new restorative orientation.

In comparison to the use of implicit racial language, RL1 made 18 references to specific racial groups in its board materials. Thirteen of these references were proactively made as the CMO described its student composition. In the remaining instances, RL1 leaders invoked explicit racial language when questioned by BUSD board members on the racial imbalance of their schools. One RL1 board trustee spoke at length:

Charter law does entertain the fact that schools should attempt to reflect the demographics of Birchwood. The underrepresentation is called out and we are focusing on it. The issue is that once you have a certain demographic at a school, it's very hard to turn it around because of sibling preference and the community we are situated in. Our school is in [a predominantly Asian neighborhood], so when you think about African Americans, that is an issue, but this is something that exists across the charter sector.

In this statement, the board member used explicit racial language to discuss the underrepresentation of African-American students at RL1 schools, but minimized the CMO's agency in this inequitable practice by alluding to their segregated geographical location and the need to assign admission preferences to siblings. Another RL1 board member responded by stating that the board's interpretation of racial diversity was narrow. She argued, "Our Asian students come from many countries that we call Asia. They come from China and the Asian Diaspora and from Pakistan. Our Latino students come from Birchwood to Oaxaca, Mexico. So, let's get rid of this notion of segregation." Here, the board member argued that RL1 students were diverse within the racial groups they represented. She did this to suggest that the CMO was engaging in equitable enrollment practices.

Overall, RL1 sought to redefine its brand with board members by providing evidence of its new restorative orientation and demonstrating the less acknowledged diversity within its student base. In this process, they utilized both implicit and explicit racial references in discussing their work. Yet, the use of deficit-laden testimonials by students who referred to RL1's strict environment and negatively characterized Birchwood communities advanced narratives that undermined their claims of fostering a restorative environment.

RL1 Teacher Engagement: A Focus on Current Faculty with Minimal Racial Cues

Unlike the other Birchwood CMOs whose outreach materials targeted prospective teachers, most of RL1's teacher engagement was focused internally. To foster positive relationships with their staff members, RL1 held teacher appreciation events, including an annual holiday potluck where their teachers "were honored for all their hard work by those who know them well." In addition, current teachers were often the target audience for RL1's social media feed, which frequently showcased teachers' accomplishments and shared appreciation for their daily work. To illustrate, RL1 posted the following in regards to one of their teacher's perfect attendance record: "What do you get when you combine a perfect attendance and a chance draw? A free lunch and a free period. Our monthly teachers raffle has paid off big time for this teacher." This post, which featured a picture of the teacher of color, was one example of how they celebrated teachers' daily work. Through these laudatory posts, RL1 also depicted their schools as positive workspaces that valued the hard work of its faculty. For example, in one social media post, RL1 described its "superhero" theme for teacher appreciation day and the various "goodies" it gave to its teachers. They stated, "RL1 believes its teachers are superheroes. They work at last 8 hours a day, and always go the extra mile. Our ED walked to every class to give teachers some goodies." Here, RL1 complimented its other posts about teacher appreciation with a concrete example of how their leaders created a supportive work atmosphere for its staff.²⁸

Race was rarely indexed in RL1 teacher outreach. In describing events and daily happenings for current teachers, RL1 made no explicit references to race nor did they include the common deracialized modifiers like underserved or low-income that were included in other CMOs' teacher engagement. At the same, RL1 did index race through visual means in teacher outreach via social media. Of the 32 teacher-related posts they generated over a two-year period, RL1 included a prominently displayed photograph or embedded video that showcased a student or teacher of color in 18 instances. Even so, they comparatively utilized fewer visual racial cues in their teacher outreach than other CMOs. Furthermore, equity references, which was a prominent appeal in CMO teacher engagement, were also absent from RL1 materials.

An analysis of RL1's teacher engagement suggests that it differed distinctly from the outreach conducted by other Birchwood CMOs in its focus on its current workforce. Given RL1 leaders' comments regarding the internal work the organization was doing to rebrand itself, this disproportionate attention is understandable. At the same time, RL1 teacher outreach generally eschewed the frequently used implicit racial devices that characterized the outreach materials of other CMOs, including equity references. Thus, while RL1 faced race-related challenges and

²⁸ Less frequently, RL1 utilized their social media feed to advertise job listings. They used this standard listing in each of the seven posts targeting prospective teachers: "Teach at RL1! Home of mid-900 API scores, and the number one ranked high school in the state. Starting salaries on par with the highest paid districts in the county." In these posts, RL1 highlighted its academic record as the primary appeal for teachers, aiming to recruit those seeking to work in a rigorous academic environment.

engaged in efforts to make itself a restorative organization, it nonetheless omitted explicit and coded racial references, which would suggest that it was developing its equity orientation.

RL1 Parent Engagement: Showcasing a Holistic Schooling Experience

Like their teacher engagement, RL1 materials suggested that the CMO focused much of its parent outreach on its current families rather than recruiting prospective parents. In engaging current parents, RL1 shared logistical information related to upcoming events (e.g., first day of school, graduation ceremony, charter renewal hearings) and school policies (e.g., drop off routines, report card dissemination) on their social media feeds and flyers. Through their social media feed, RL1 also shared photos and videos of school activities to provide a window into the school environments students entered each day. These celebrated school activities included guest speakers, field trips, and holiday festivals. In sharing these activities, RL1 provided details about the event alongside visual images of students and teachers enjoying themselves throughout the experience, serving to counteract perceptions of RL1's overly strict school environment.

By including student and teacher images in their presentation of school events, RL1 invoked implicit racial messaging in their parent materials. Of the 78 school events described in RL1's 110 Facebook posts, 63 were accompanied by videos or photographs, making race visually present in these materials. The only other instances in which RL1 invoked any sort of racial reference were in its description of school events related to cultural or racial history celebrations. One social media post showed an image of first graders reading alongside this statement: "The First Grade Scholars read Black History." In another example, RL1 described a student field trip to Birchwood City Hall: "RL1 students recognized Chinese Independence Day. More than a 100 students and teachers walked to the celebration and were treated to a full menu of performances." In these instances, RL1 conveyed the range of experiences that students received at RL1 to their parent audiences and showed how school activities celebrated diverse cultures and racial groups. Overall, while RL1 invoked race in these instances, its leaders typically eschewed explicit and implicit racial language in describing their work, which mirrored the observed pattern across the Birchwood CMO landscape.

RL1 parent outreach did seek to engage prospective teachers in a few instances. In one representative example, the organization circulated the following post on its social media feed:

What an opportunity!!! The best high school in the state has openings for new students. RL1 has space available for grades 9-12. Why RL1? College prep and college level courses, innovative programs, a brand new ethnic studies program, and we graduate 90-100% of our senior class every year.

In this announcement, RL1 shared data and key accolades to appeal to parents who sought an academically rigorous high school for their child. They also briefly highlighted their programmatic design and strategically named its "brand new ethnic studies program" as way to market their new restorative orientation. Through this reference to ethnic studies and the post's accompanying image of students of color in graduation robes, RL1 implicitly invoked race in its appeals to parents seeking a school placement.

Taken collectively, RL1's parent outreach was characterized by an emphasis on daily school occurrences and celebrated events. In these efforts, RL1 sought to build its reputation as a CMO that provided a well-rounded schooling experience, which buffered critiques emanating from the organization's history in Birchwood. In doing so, they selectively and infrequently drew

upon implicit and explicit racial framing to characterize their programmatic work, but only as it promoted RL1 as a restorative or holistic organization.

Summary: RL1's Variable Conformity to CMO Behaviors

To repair its standing in Birchwood, RL1 utilized coalition-building efforts to provide counternarratives to the organization's reputation as a punitive school network that selectively recruited Asian American students. At the same time, their organizational needs led RL1 leaders to prioritize local and internal audiences. Unlike other CMOs who frequently targeted prospective teachers, parents, and funders, RL1 disproportionately attended to their current constituency and local policymakers to rebuild trust with the stakeholders that most affected RL1's day-to-day workings and network sustainability. These patterns suggest that RL1 variably conformed to the coalition-building behaviors of the broader CMO population. It selectively invoked tropes related to restorative practices and academic rigor, yet it disproportionately maintained an internal focus to repair and rebrand given the obstacles it faced.

In these coalition-building practices, RL1 utilized colorblind discourse in describing its work. They utilized visual imagery or euphemisms to describe their student populations in conjunction with references to restorative justice or in the midst of deficit-laden narratives conveyed by their alumni. In making implicit racial references in congress with these ideas, RL1 subtly derogated urban communities in arguing for the need for strong educational interventions and crafted their constituents as deficient in the process. At the same time, RL1 did selectively utilize explicit racial references when engaging local policymakers—an audience that had voiced concerns about the demographic homogeneity of the network's student population. In these instances, RL1 deployed explicit racial language as a resource to anticipate and respond to critiques from this stakeholder group. While RL1 deviated from coalition-building patterns in its efforts to repair its legitimacy, it conformed to racialized norms through its use of colorblind discourse and its selective and instrumental use of race in the policymaker context.

Gaining legitimacy: GL2

Organizations seeking to gain legitimacy are those entering or expanding their presence in a particular field (Suchman, 1995). In their efforts to gain legitimacy, they typically conform to pre-existing norms, engage audiences that are amenable to their organization, or create new audiences and legitimating beliefs. In this study, GL2 represents one such organization. GL2 opened its doors in the early 2000s²⁹ in one of Birchwood's flatland neighborhoods. For over a decade, GL2 has focused on developing its programmatic design within its original K-12 pipeline. In doing so, it has become a much-lauded member of the local charter community, receiving multiple awards and distinctions for high academic performance, college attendance rates, and innovative pedagogical approaches. Its leaders have also been successful in securing consistent and ample financial backing from philanthropic groups, and the organization maintains a robust professional development arm open to all practitioners. To expand upon its well established local reputation, GL2 is actively seeking to expand the number of schools it operates and to increase its brand recognition. Recently, GL2 opened an additional school in response to board member demand and is planning to open another site in the upcoming years.

GL2 Strategy Development: A Selectively Race-Conscious Approach

While GL2 was a respected local CMO, their reputation was marred by one issue: the

²⁹ To maintain confidentiality, organizational details and years of operation for each CMO are obscured.

lack of diversity among its teachers and students. To build upon its legitimacy status, GL2 sought to address this concern as they expanded their schools and built their brand. To increase the demographic congruence between its teachers and students, GL2 devised strategies to recruit teachers of color. One Latina GL2 leader explained their varied approach:

I've reached out to our teachers of color here to tap into their networks... We've also posted in certain networks that we know are targeted toward teachers of color. We've attended conferences and tabled, such as the Teachers for Social Justice Conference. Within all of our job postings, we explicitly state that teachers of color and bilingual educators are highly encouraged to apply.

In addition to these efforts, interviewed GL2 leaders described their teacher pathway program as a long-term strategy to enhancing diversity. This internal pipeline tapped into the diverse pool of afterschool staff and supported interested teachers through an apprenticeship program.

In addition to the race-conscious efforts GL2 devised to recruit prospective teachers, their leaders developed racialized strategies to diversify their predominantly Latino student population. Specifically, GL2 moved away from depending on its significant waitlist and hired community organizers who could recruit from various communities. The aforementioned leader stated, “We hired somebody who could do outreach with the Latino community, and we hired an African-American community organizer with deep connections in the city having lived here for a long time to do outreach with African-American families.” Their strategies included recruitment of local families at clinics, nail shops, laundromats, and other local businesses in addition to formal presentations at churches and association meetings. Furthermore, one white male school leader described how they had legally adjusted their enrollment preferences to include language on “diverse founding families” and “priorities to people who are zoned to attend primarily underperforming schools, which in our city are more African-American students.” All in all, GL2 developed race-based strategies to increase the number of Black families in their schools.

The race-consciousness that GL2 leaders employed in devising coalition-building strategies for families and teachers was present in their board discussions of GL2’s mission. As the board sought to refine their theory of change, they explicitly discussed the following question: “How explicitly should we name/address racism and classism in our theory of change?” They grappled with this question at several board meetings and generated a tentative list of problem statements that would guide their theory of change:

- Children are bound by persistent cycles of racism and classism guaranteed to perpetuate the status quo.
- Communities of color are locked into a de facto caste system despite individual or familial advances.
- Systemic oppression undermines our democracy and our humanity.

After several more discussions and revisions, GL2 leaders ultimately decided upon the following statement for their published theory of change, which excluded the original references to racism and classism: “Persistent inequity in education threatens our collective future.” Overall, GL2 acknowledged and grappled with naming race in the context of their work, but ultimately decided to forego naming it in its external facing materials.

While openly grappling with race in their theory of change, GL2 leaders eschewed racial analyses when discussing other elements of their work at board meetings, including funder engagement. GL2 funder discussions focused on developing the formal program for their annual gala and encouraging board members to leverage their networks to increase attendance or contributions. In one instance, GL2's financial officer, a white male, provided board members with outreach tactics they could use to inform donors about the organization. This included sending funders web-based links to GL2 promotional videos, inviting them to school events, and providing them with students' personal statements, which were one-page documents where students shared their lived experiences. While none of these tactics foregrounded race explicitly, race was implicitly indexed in each of these strategies as potential donors attended schools, watched videos, or read student narratives that contained racial subtexts. All in all, GL2 leaders generated individualized, relational, and document-based strategies to solicit funder support. Yet, unlike the race-conscious strategies they generated for other stakeholders, race operated implicitly in this strategy development.

As GL2 developed coalition-building strategies to enhance their reputation, they acknowledged how race posed a threat to their expanding brand. Because of the demographic homogeneity within their workforce and student population, GL2 leaders developed race-conscious strategies to diversify their schools at the teacher and student level. While this race consciousness was initially evident in their vision conversations, race was minimized and implicitly indexed in developing funder engagement strategies and other marketing material.

GL2 Policymaker Engagement: Conforming to CMO Thematic and Discursive Patterns

Like other CMOs, GL2 officials emphasized their programmatic design and its impact on students' college and career preparation in engaging BUSD board members. In making this argument, GL2 representatives presented their performance data and illustrated how their project-based learning model enabled students to produce "high quality work with real-world impact" for the 21st century economy. At the same time, GL2 leaders emphasized how their schools supported the whole child, which was put forth as one of the CMO's central values. GL2 officials named universal lunch programs, counseling, and daily advisory groups as critical supports that were in place to serve students social and emotional needs. Furthermore, GL2 leaders stressed the use of restorative justice practices. In one representative example, the dean of instruction, a Black male, explained, "We have restorative justice practices in place to facilitate strong relationships while also providing a space for students to repair relationships if and when something goes wrong." Here, GL2 echoed the tropes advanced by the CMO population by emphasizing its holistic and restorative educational approach.

Like other Birchwood CMOs, GL2 emphasized its community embeddedness. In several instances during their formal presentations, leaders articulated that they were "moving forward with and for Birchwood." In this phrase, GL2 representatives stressed their connection with local stakeholders by including the preposition "with" to signal partnership. In another instance, GL2's executive director, a white female, concluded a charter hearing by stating, "*Our* school is a beacon of hope for many ... *Our* community—those that don't have the highest quality school option—is what motivates us... *Our* model is going to push school design to better serve our students [emphasis added]." In repeating the pronoun "our" throughout her statements, the CMO leader situated the school's staff and constituency as part of the Birchwood collective. Other stakeholders substantiated GL2's community-rooted claims in their public comments. For instance, one sitting board member who frequently opposed charter renewals expressed, "They

[GL2] are doing right by kids. They emerged from the community. They did not come in from some outside charter management organization. They were independently formed, and they have certainly been good at finding ways to fund their mission.” Through this comment and the many others expressed by community members, parents, and staff, GL2 garnered additional evidence that enhanced the perception of them as a community-based organization.

In these organizational depictions, GL2 utilized implicit and explicit racial discourse to discuss its work and organizational purpose. Like other Birchwood CMOs, GL2 officials indexed race visually through the use of prominently displayed images on one or more of their PowerPoint slides in each of their three petition hearings. They also visually indexed race by asking students and parents to present statements during presentations or public comment, who typically conveyed their support for GL2 through anecdotes of its rigorous academic program and its teachers’ commitment. In conjunction with these visual racial cues, GL2 invoked income-related or deracialized modifiers in 19 instances when describing their mission, programming, or student population. For instance, GL2 named its target student population in the following way: “GL2 serves students who live throughout Birchwood and has a particular focus on a neighborhood in which high percentages of students live in poverty.” This statement, which highlights GL2’s attention to low-income students, was presented alongside an image of a smiling elementary-aged Black male, thus becoming a way to speak about students of color through an income lens. In addition to income-related descriptors, GL2 also referred to language learners, those living with the negative effects of “societal dysfunction,” and first generation college students to characterize their school populations amid racial imagery.

GL2 also selectively used explicit racial language in 17 instances in their interactions with BUSD board members. Like other CMOs, they referred to specific racial groups when describing the demographic composition of their schools or when disaggregating their data by racial subgroups. In addition, they employed racialized language when questioned on the concentration of Latino students in GL2 schools. For example, a Latina senior leader described the CMO’s race-conscious parent recruitment strategies to the board:

We have hired two community organizers two years in advance to actively recruit diverse families like the ones you heard from today. Action two is via our policy and enrollment preferences. Sixty percent of our seats are zoned for students who would otherwise attend an underperforming school as defined by BUSD. In our city, a large percentage of those students are African Americans.

In addition to sharing these race-conscious strategies, they used explicit racial language to argue that they were serving their current African-American population well. An Asian female school principal stated that while African-American students constituted only 15 percent of GL2’s student base, 95 percent of those families felt valued as community members as per their annual parent surveys. The GL2 leader argued that this data suggested that they had developed a safe environment for Black students. Overall, while GL2 used a range of implicit racial frames to discuss their work, they simultaneously deployed explicit racial language, particularly when discussing the race-based issue that threatened its organizational legitimacy.

In their policymaker engagement, GL2 articulated many of the same themes put forth by the broader CMO population. They portrayed themselves as an academically rigorous organization that successfully prepared its students for college and career in the 21st century. They also emphasized their community roots and their holistic and restorative approach to

serving students. In doing so, they employed similar racial discourse wherein they selectively utilized explicit and implicit racial messaging in their policymaker outreach. With the former, GL2 used explicit racial messaging as a political resource to address critiques of the underrepresentation of Black students in their schools. While following these discursive patterns, GL2 differed from other CMOs in that their policymaker engagement was devoid of deficit-laden community depictions that CMOs often advanced to justify the educational need for their organizations.

GL2 Teacher Engagement: Similar Tropes and Coded Racial Appeals

Like the population of Birchwood CMOs, GL2 emphasized professional learning in their teacher outreach. For example, in a flyer targeting teachers for their new school site, GL2 stated, “Your school day, week, and year are structured to ensure you have time for professional growth.” This statement, which was followed by a list of specific ways GL2 accomplished this goal, was couched under the phrase “invest in your professional growth and leadership development.” GL2 also characterized its organization as a collaborative work environment. In one recruitment video, a white male teacher discussed this collegial orientation: “Working at GL2 gives you a chance to break down teacher silos, to work in an environment where practice is public, responsibility for students is shared, and collaboration, feedback, and support and growth are the norm.” Overall, in its teacher outreach, GL2 emphasized professional learning, and through the voices of current teachers, highlighted its collaborative work environments.

GL2 used an array of racially coded appeals in their teacher engagement. Like other CMOs, GL2 consistently included photographs or videos of people of color in their marketing. Teachers, leaders, or students of color were primary speakers in their videos and were featured prominently on webpages or social media posts intended for teacher audiences. Within these visual racial cues, GL2 utilized many of the deracialized descriptors that CMOs deployed in their stakeholder engagement. For instance, in her comments during a teacher recruitment video, a Latina GL2 school leader stated, “Our teachers will nurture and empower our Birchwood youth by cultivating relationships and affirming our students’ diverse identities in a community that is safe and restorative.” In this statement, the words “diverse” and “restorative” represent coded racial language that were characteristic of the discursive messaging deployed in broader CMO efforts. In a second example, GL2 included the following statement with an announcement for a recruitment event: “Built on the belief that a high-quality education for traditionally-underserved students is a vital remedy to generational poverty and societal dysfunction, GL2 serves 1,000 K-12 students and is opening a new site.” Here, GL2 employed the term underserved and made allusions to poverty and broader “societal dysfunction.” They did so in conjunction with an image of a student of color, indexing race amid this deracialized language. Finally, GL2 also emphasized the concept of equity as an implicit racial appeal. For example, the phrase “ensure educational equity for all students” was written on 70 percent of their teacher outreach materials alongside visual images of students and teachers of color.³⁰

Taken collectively, GL2’s teacher outreach is characterized by similar patterns to those identified in the Birchwood CMO landscape. Thematically, it emphasized professional learning and collaboration to appeal to teachers. GL2 also advanced subtle racial cues to suggest that the

³⁰ GL2 leaders mentioned that they explicitly stated that teachers of color were desired applicants on their outreach materials. This was evidenced in only one GL2 teacher flyer as follows: “People of color strongly encouraged to apply.”

organization engaged with a student population composed of marginalized racial groups. Like other CMOs, GL2 conveyed this primarily through visual means and coded language, which enabled them to allude to race without naming it in the context of their work.

GL2 Parent Engagement: Deracialized Outreach with Social Justice Undertones

In their parent outreach, GL2 detailed school programming and logistical information regarding school enrollment processes. In conveying this information, GL2 maintained the same deracialized orientation that other CMOs utilized when engaging this stakeholder group. GL2 omitted descriptions of student populations, which represented the most common instances when CMOs utilized explicit or implicit racial modifiers, on all but one of the parent materials amassed. The only descriptor conveyed in GL2 parent materials was the term diverse, which was embedded in their mission statement to describe their student body. Furthermore, GL2 eschewed racial imagery in their parent outreach materials; only two of the 13 GL2 parent documents contained an image or video featuring a student, teacher, or parent of color. Overall, in providing information to parents, GL2 highlighted information relevant to this audience but did so in a manner that de-emphasized many of the racial cues that were utilized in other forms of outreach.

In engaging current parents, GL2 held a variety of social gatherings, maintained active social media feeds, and circulated a weekly newsletter to inform parents of deadlines and upcoming events (e.g., healthy cooking seminars, upcoming charter renewal hearings). Like the materials intended for prospective families, GL2 newsletters eschewed implicit and explicit racial references. In the 43 GL2 newsletters amassed, the deracialized modifiers characteristic of other marketing materials were omitted. Furthermore, the materials contained only one image of parents of color, who were celebrated for finishing a course on effective communication and parenting, and one explicit racial reference where GL2 announced a series of events to “introduce authors of Latina/o heritage and start the conversation of what it means to be a Latina/o American.” Conversely, social media was a forum in which GL2 did visually index race through videos and photographs. Of the 143 GL2 Facebooks posts, 74 percent contained images of students and families alongside descriptions of school events. In these posts, GL2 invoked the names of specific racial groups in 6 instances when describing events celebrating cultural or racial heritage. In one representative post, GL2 displayed a photo of a classroom full of students celebrating and wrote, “‘We love black history!’ GL2 third graders shouted, at the close of a celebration honoring important women, men, and achievements in black history put on by our afterschool program.” Taken collectively, outreach for current GL2 parents emphasized logistical information and school occurrences, which were conveyed in a deracialized manner with the exception of its social media feed.

GL2 also held community events that were intended as social gatherings or celebrations of important CMO milestones, including the opening of new facilities. At one such event, a GL2 school leader drew upon a social justice frame with its parent and community audience. In describing her students and families as “history makers,” the principal stated, “Like those that came before you, you are learning to be a change maker. That means that you are going to make the world to be the way you want it to be for your family, your community, and the entire world.” In stating “those that came before you,” the school leader subtly alluded to the city’s civil rights legacy—a history that would likely conjure knowledge of community leaders involved in race-based social movements for local stakeholders. In doing so, the school leader subtly invoked a racialized history that had a positive connotation for its target audience.

GL2 parent engagement followed the patterns identified in the broader CMO landscape.

Much of the information conveyed was logistical and in turn, was presented without descriptions of student, communities, or mission statements. In foregoing these descriptions, GL2 employed race-neutral discourse in their parent coalition building. Exceptions arose on social media where GL2 made implicit racial references through photographs and videos and at parent events where GL2 speakers alluded to the city's civil rights past.

GL2 Funder Engagement: Colorblind Outreach and Deficit-Laden Narratives

To grow its donor base, GL2 enacted informal and formal strategies to secure financial support. Individualized efforts included those by GL2 board members, who were asked to leverage their networks to increase the pool of funders. In these efforts, GL2 board officials directed potential donors to webpages and circulated promotional videos intended for funder audiences. In these materials, GL2 rhetorically emphasized college and career. To illustrate, in the description of GL2 on their donor webpage, the language read, "Every dollar you donate will be put hard to work at GL2, ensuring that all students regardless of their background, first language, or ethnicity will graduate prepared for college and a career of their choice." In a separate example, GL2 embedded the following statement on its web portal for online donations: "Your secure donation helps give some of Birchwood's most disadvantaged children the skills they need to graduate from high school, go to college, and have a hopeful, productive future." In each statement, GL2 situated their organizational work in the context of college and career prospects. Also of note is the fact that GL2 utilized coded racial language in this process by describing its student population as "disadvantaged" or through the phrase "regardless of their background, first language, or ethnicity." This coded racial language was characteristic of GL2's web-based donor engagement. On their webpages, GL2 eschewed all explicit racial references in favor of euphemisms. Furthermore, two of the six webpages for donor audiences included images of students of color and all three of GL2's donor promotional videos indexed race visually by featuring students of color working in classrooms or speaking with board members.

In the midst of these implicit racial appeals, GL2 affiliates advanced statements that contained deficit-laden subtexts. For example, in one donor video, a GL2 board member stated, "We are taking them from despair and poverty, and they're being educated. I can't think of anything else that is more important than educating our youth." In this description, the white male speaker characterized GL2 students as living in depraved conditions and alluded to their lack of agency by suggesting that GL2 was "taking them" out of these situations and providing them with a quality education. This subtle derogation of GL2 students' living conditions was also present in the student narratives that board members were told to circulate to funders. These resources, which were one-page Word documents, included negative depictions of life for disadvantaged Birchwood residents. To illustrate, a Latino student began his account in this way:

There is a saying that what doesn't kill us makes us stronger. I have a different saying, that when a part of us dies, another is born. When my cousin, Santos was murdered by the police, his death gave my life a new purpose. I learned that life is not merely defined by the things we have or people we know, but by the change we seek to enact. It is fleeting and can be taken in a second. The fragility of life in Birchwood is my biggest obstacle. I can't merely escape it, but I need to help ameliorate it.

The student's references to the crime-ridden streets of Birchwood set the stage for the remainder of his narrative where he described the safe haven that GL2 provided that allowed him to excel

academically. Other student narratives followed the same pattern. Students began by describing the violence, drug addiction, or impoverished conditions that surrounded them in their neighborhoods and then transitioned to discussing how GL2 had enabled them to flourish in its safe and encouraging environment. Overall, GL2 circulated deficit-laden depictions of its students and their living conditions for donor audiences. This created a rationale for GL2's work in Birchwood while revealing how the CMO had changed the odds for deserving students.

In addition to individual funder solicitation, GL2 held an annual gala for fundraising purposes.³¹ In advertising the event, GL2 circulated a flyer that contained the only explicit racial reference made in its funder engagement. The flyer contained the following statement:

Birchwood's future is threatened because kids aren't getting the education they deserve. Over 25 percent of Birchwood's Latino and African-American students drop out before graduating high school. Of those who graduate, less than half graduate with the credits that make them even eligible to apply to a four-year college. Over 700 students are on the GL2 waitlist. Your support changes their future.

In naming race in the context of these alarming statistics, GL2 selectively tied race to the harsh conditions experienced by many Birchwood residents, while also positioning itself as the change agent for Latino and African-American students. While GL2 named race in this flyer, the gala itself appeared to be characterized by implicit racial messaging. GL2 accomplished this through the use of student speakers, two of whom served as the masters of ceremony for the event. Other students of color were also present at the event to showcase their robotics projects and other creative inventions as attendees walked about and asked them questions about their work.

Like other CMO funder engagement, GL2 emphasized how their organization advanced students' college and career prospects amid an array of implicit racial cues. While generally eschewing explicit racial references, GL2 implicitly indicated that they served Black and Brown students and in doing so circulated narratives with negative racial subtexts to depict their constituents as lacking and in need of intervention.

Summary: GL2's Race Conscious Intentions Yet Colorblind Implementation

To enhance their organizational legitimacy, GL2 conformed to the thematic patterns displayed by other CMOs. Like the broader population, they employed both race-conscious and coded discourse when engaging policymakers. They appealed to potential teachers through a range of subtle racial cues and avoided racial references with parents with the exception of allusions to the city's activist history. With funders, GL2 also imitated colorblind norms by circulating deficit-laden tropes amid coded racial language for this audience, which was primarily composed of those with economic, political, or racial power.

At the same time, GL2 differed from the CMO population in its attention to race in developing engagement strategies. GL2 leaders were aware that their organization was implicated in the marginalization of the city's African-American population from the charter sector, and it sought to diversify its student and faculty base to reverse this pattern. Thus, while GL2 did not try to rebrand itself to the same degree as RL1, it did engage in race-conscious efforts to address the dominant threat facing its organization. Yet, despite acknowledging race in their coalition-building strategies, the racial cues deployed in their efforts minimally reflected

³¹ Since the GL2 gala was a private event, I did not attend it for data collection purposes. The observations and analysis I advance regarding the event were obtained from a video of gala highlights that GL2 posted online.

this race-conscious orientation.

Their approach to stakeholder engagement reflects how GL2 sought to maintain their commitment to Birchwood while advancing their own organizational priorities. As an organization seeking to grow its brand locally and nationally, GL2 was attentive to local norms related to community activism and race consciousness, yet also conformed to broader expectations around coalition-building practices and racial messaging. Furthermore, GL2 selectively articulated or abandoned the race-conscious approach depending on the racial norms of the context and the values stakeholder groups were perceived to maintain. Their approach to coalition building suggests that organizations seeking greater legitimacy manage multiple strategic priorities and in doing so, may compromise their local and racial commitments.

Maintaining Legitimacy: ML1

Coalition-building efforts are typically enacted with greater ease for those with a recognizable brand. At the same time, established organizations face unique obstacles, including the maintenance of heterogeneous coalitions and the deflection of growing opposition to their organizational models (Suchman, 1995). In the Birchwood context, ML1 represents one such organization. Established in the late 1990s, ML1 is one of the largest CMO operators in the country. Its founders conceptualized ML1 and its keen focus on college attendance, professional development, and data-driven decision making after successfully advocating to lift California's cap on the number of charter schools. Since opening its first schools, ML1 has expanded to over 30 schools in multiple states. In its existence, the CMO has received many accolades including several Title 1 Academy Achievement Awards and has earned multiple grants from the federal government and prominent philanthropies to support network growth. In Birchwood, ML1 is the largest charter operator in the city limits. Overall, it is a well-established CMO whose record of high student achievement, grant allocations, and awards make it a recognized and reputable charter school brand.

ML1's Colorblind Development of Stakeholder Engagement Strategies

Some evidence suggests that ML1 leaders acknowledged race in generating strategies to recruit stakeholders. Like other Birchwood CMOs, ML1 officials considered race in the context of parent recruitment. ML1 described how race informed parent engagement in its charter petitions, which required them to state how the organization would foster racial and ethnic balance in their school populations. The formal language they included under this statute stated, "ML1 will monitor the racial and ethnic balance among its students on an annual basis and will engage in a variety of means and strategies to try to achieve a racially and ethnically diverse student population." It, then, broadly described its outreach efforts in neighborhoods and its general marketing strategy. While describing parent recruitment in this manner, ML1 defined its target population with racial ambiguity. In each of its seven charter petitions, ML1 stated that it aimed to serve students "from low-income families," "whose primary home language is not English," and "who would be the first in their families to attend college." Because legal parameters prohibited CMOs from naming the specific racial groups it aimed to serve,³² ML1

³² Both state and federal laws prohibit CMOs from naming race as a criterion for recruitment and enrollment. For instance, under California's Proposition 209 (1996), schools are prohibited from granting preferential status to any individual or group on the basis of race, ethnicity, or national origin. At the federal level, Supreme Court cases including *Parents Involved in Community Schools v. Seattle School District* (2007) limit the degree to which race can be considered in enrollment decisions.

described its efforts to create racial diversity with euphemisms that could obscure interracial imbalances within their constituencies.

With teachers, there was little evidence to suggest that ML1 considered race in teacher recruitment. One senior leader at ML1 suggested that the CMO had analyzed the racial composition of its staff and made strides to diversify its workforce. She explained:

Over 50 percent of our staff is Black or Latino, which is pretty extraordinary. But if you actually look within that group at who's hourly and who's salary, the Black and Latino folks are heavily weighted towards hourly, so they are overwhelmingly our custodians, cafeteria workers, etc. Overall, I think we're doing a great job of having a diversified workforce, but we are still not seeing that diversity as you get increasingly senior. With that said, there is probably more conversation on this at ML1 than almost anywhere else.

In her statement, she suggested that ML1 had foregrounded race in their staff analysis and implied that diversification, particularly at the more senior level, remained a frequent topic of conversation. At the same time, strategies for recruiting teachers of color were not signaled in organizational documents, other interviews, or ML1 governance meetings.

In governance meetings, ML1 board leaders discussed funder engagement strategies in a deracialized fashion. Like other CMOs, ML1 discussed systemic wide issues related to finance, facilities, and growth in these settings. In turn, they had several discussions about expanding their donor base. As a strategy, ML1 board leaders were asked to “serve as ambassadors” and to leverage their professional and personal relationships to increase financial contributions. ML1 staff also provided board members with a variety of activities they could enact such as hosting an event at one’s home, office, or professional association, to inform potential funders about the CMO. Furthermore, the ML1 board discussed the strategic messaging they should convey to tap into “donor psychology,” which centered on highlighting market principles. For example, one board member opined that ML1 ambassadors should emphasize the CMO’s growth as a selling point instead of the CMO’s usual emphasis on its 100 percent college acceptance rate or College Guaranteed tagline. Overall, ML1 senior leaders were cognizant of the need to craft a coherent “case for giving” in its donor appeals and brainstormed themes they thought would appeal to this group.

Like other Birchwood CMOs, ML1 officials signaled that they considered race in both student and teacher recruitment, but did so with little evidence or discussion of how their strategies would diversify their populations. With funder engagement, there was no evidence that ML1 acknowledged race or diversity in the context of this work. Instead, they discussed how corporatized or entrepreneurial messaging would more likely appeal to a donor base.

ML1 Policymaker Engagement: Showcasing the Model, Minimizing the Context

Like other CMOs, ML1 officials described CMO programming and performance data, and thematically emphasized college attendance through the frequent recitations of their motto College Guaranteed. ML1 leaders also underscored how it had “intentionally partnered” with BUSD through literacy initiatives, data management, and early college programs to illustrate its collaborative orientation. While mirroring these broader patterns, ML1 differed from other CMOs in distinct ways. First, ML1 provided comprehensive descriptions of teacher professor development in each of its policymaker materials, which led the CMO to emphasize professional learning with greater frequency than its counterparts in this context. Moreover, ML1 made few

references to supporting the whole child in their public presentations. In the six presentations observed for this study, ML1 leaders alluded to whole child or “social-emotional” supports in two instances and did so only briefly in discussing their school programming. Also rhetorically absent from ML1 policymaker engagement was an emphasis on community roots and connections. Instead of highlighting its embeddedness within Birchwood, ML1 had students, parents, and teachers share their comments on the community ML1 had fostered within their schools. Overall, the content and themes ML1 conveyed to policymakers had similarities and key differences from the broader CMO population.

ML1 made both explicit and implicit racial references in their policymaker engagement, conforming to the patterns ascertained from the broader population. ML1 made explicit racial references in 14 instances across their six presentations. Thirteen of these were made as ML1 described the demographic composition of its schools. The remaining reference to a specific racial group came as a white male ML1 school leader highlighted the strong academic performance of its African-American students in discussing his school’s achievement. While naming race in these instances, ML1 also utilized implicit racial language. It consistently indexed race through images of students of color on one or more slides on each of its six presentations and through parent and student testimonials during public comment. Furthermore, ML1 leaders stated that they served “low-income” students or operated a “high-poverty district” in 11 instances and utilized deracialized modifiers (e.g., diverse, underserved) in six other instances to describe its student body. In one divergent example, an ML1 leader used the deracialized descriptor “diverse” to discuss the CMO’s efforts to diversify its teaching force. She stated, “Having a more diverse staff that reflects the communities we are serving—I am really proud of this work we are taking on.” This statement represents the only instance in which an ML1 official publicly acknowledged the racial composition of its teachers or that it maintained this race-conscious priority. All in all, ML1 policymaker engagement was composed of a similar interplay of explicit and implicit racial messaging that other CMOs advanced. One notable exception was ML1’s omission of restorative justice references.

Like other CMOs, ML1 provided programmatic information to depict itself as a successful model for policymaker audiences. In doing so, it similarly emphasized its college-going focus and its collaborative orientation amid an array of explicit and implicit racial frames. At the same time, ML1 was distinct in its thematic omission of whole child, restorative justice, and community-based messaging. In this sense, ML1 emphasized its own organizational and academic structure with minimal attention to themes that reflected deep understanding of and connections to the local context. Also of note is the lack of discussion around ML1’s homogeneous student population. Other Birchwood CMOs proactively or reactively described their efforts to address the lack of African-American students in their schools. In ML1 hearings, this debate never arose despite the fact that ML1’s student body was 74 percent Latino and only 24 percent African American. (See Table 2 in Chapter 4 for complete statistics.)

ML1 Teacher Engagement: Emphasizing Teacher Learning Amid Implicit Racial Cues

In recruiting teachers, ML1 described how the organization fostered professional learning on 40 percent of its outreach materials. Beyond naming professional learning explicitly on many of these documents, ML1 also provided extensive details about their professional development structures that facilitated teacher growth, including opportunities for formal mentorship. In doing so, ML1 also depicted its schools as collaborative environments. In one representative example from a webpage, ML1 stated, “We live and breathe collaboration...You’ll see collaboration alive

in quick conversations in the hallways, morning meetings over coffee, co-planning sessions during afternoon periods, and more. It's more than meetings – it's a mindset." Overall, in their teacher engagement, ML1 followed suit in thematically emphasizing professional learning and collaboration for its teacher audiences, yet differed in the detail it provided about professional development structures and programs.

As ML1 conveyed this message to teachers, they utilized a range of implicit racial references. Like other CMOs, ML1 teacher engagement primarily indexed race through the use of visual imagery. Of the 30 teacher-focused ML1 documents in this study, 23 contained a prominently displayed photograph or embedded video showcasing students of color. Also, while all ML1 teacher materials were devoid of explicit racial discourse, ML1 invoked the terms low-income or underserved in seven instances. For example, in describing its teacher supports, ML1 used "underserved" to describe its student population: "We know that having a high-quality teacher in every classroom is the best way to close the achievement gap for traditionally underserved students." In addition, they used an income-based descriptor in a flyer that detailed ML1's teacher equity beliefs: "Our founders believed in creating high-quality public school options in low-income communities which have historically lacked that access. Every part of our mission lives and breathes the mandate to address this inequity." When these modifiers are interpreted alongside racialized images, they operate as coded racial language.

The final example above also illustrated how ML1 emphasized the idea of equity for its teacher candidates. In each of the four supplemental flyers it circulated on its webpages, ML1 named equity as an organizational value that permeated each aspect of their work. For instance, ML1 stated, "Teammates use an equity lens to examine our policies, practices, and systems as we strive for all groups to increase access and benefit from our work." On another document, ML1 explicitly clarified how it defined equity. They stated, "We understand the significant difference between equity and equality. Every student deserves to receive what he/she needs to succeed (equity), not that every student receives the same amount of resources, instruction, attention, etc. (equality)." In subsequent bullet points, they noted how their school environments, family engagement, and school culture enabled equity in their schools. In a divergent example, ML1 explicitly noted that their work sought to interrupt the "school to prison pipeline (policies and practices that are directly and indirectly pushing the most at risk students out of school and on a pathway to the juvenile and criminal justice systems)." This reference to the school to prison pipeline and "at risk students" were the only instances in which race was implicitly or explicitly invoked within their equity claims. Furthermore, none of ML1's equity statements were advanced in congress with an image or video of students of color.

Like other CMOs, ML1 rhetorically emphasized professional learning, collaboration, and equity as it engaged teachers. In addition, ML1 similarly used coded racial appeals to engage teachers, particularly through visual imagery. Conversely, ML1 differed subtly in how it invoked equity. While other CMOs advanced equity claims amid implicit racial references, ML1's equity statements were made in isolation from these visuals, making equity references ubiquitous.

ML1 Parent Engagement: Sharing Logistical Details Through Racially Coded Means

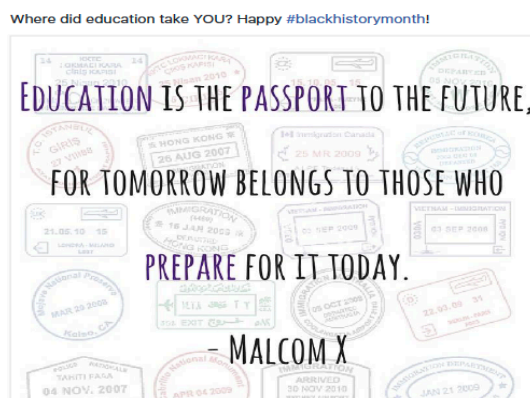
The information conveyed in ML1 parent materials focused on logistical information related to student enrollment processes (e.g., eligibility, lottery) and was supplemented by minimal descriptions of the organization. To illustrate, in advertising an upcoming school enrollment session, ML1 stated, "Choose a College Guaranteed education! Join us this Saturday to ask questions and enroll your student." In this advertisement, ML1 briefly referred to its

college going focus before providing information on the location of the enrollment event. In addition to basic information, ML1 described how it partnered with parents to facilitate student success. On one of its parent webpages, ML1 stated, “Families are the most important partner in education. Children learn best when their parents are engaged every step of the way, creating a bridge of learning from the classroom to the home.” They went on to describe how it supported parents in this partnership with Saturday classes and guidance for at-home support. Finally, ML1 included an embedded promotional video to highlight parent perspectives on the CMO’s impact. In this video, parents provided testimonials of the school’s influence on their child’s academic achievement and the staff’s commitment. Overall, ML1 parental outreach materials provided logistical information like other CMOs. At the same time, they provided more descriptions of expected parent participation and circulated anecdotal evidence to convey their effectiveness.

Within their parental outreach, ML1 made few racial references. ML1 made no explicit references to race in describing their schools or missions. In terms of implicit racial framing, the CMO only utilized the phrase “low-income” in its parent materials, which it subsumed at the bottom of each document with the following statement: “ML1 is one of the nation's top-performing large school systems serving predominantly low-income students.” At the same time, ML1 did index race visually in several instances. ML1 included images of parents and students of color on four of the six parent documents and exclusively showcased the perspectives of parents of color in its promotional video.

ML1 also engaged their current parent base via social media, parent gatherings, and monthly newsletters. Like the feeds of other CMOs, ML1 used social media to provide parents with school updates and to showcase celebrated school events, including field trips and student performances. With the latter, ML1 circulated videos or photographs related to school activities with 82 percent of its posts (191 of 223), thus indexing race for their parent audience. While providing visual racial cues, ML1 rarely included coded racial modifiers on social media. The terms “low-income” or “underserved” were each used once in conjunction with articles ML1 shared about accolades they had received. In addition, ML1 named race in seven posts, exclusively in relation to Latino or Black History Month. Figure 4 contains a sample post.

Figure 4. Example of ML1 Black History Month Facebook Post



In this post, ML1 explicitly referred to race through its mention of Black History Month and implicitly indexed race by quoting Malcolm X, whose name is spelled incorrectly. Beyond social media, ML1 consistently included visual racial cues in their monthly newsletters while eschewing explicit or coded racial language. In each of its 14 newsletters, the CMO included

photographs of students of color in the newsletter banner, but only made one explicit racial reference and eight deracialized references throughout its articles.

Overall, ML1 parent engagement followed broader CMO patterns in emphasizing logistical information that was conveyed through deracialized or coded means. While ML1 followed suit in indexing race through visual imagery and by eschewing explicit racial language, it included more implicit racial modifiers (e.g., low-income) in its appeals to parents. Thus, when compared to other Birchwood CMOs, ML1 more openly situated its work in the service of alleviating economic impediments, even for parent audiences.

ML1 Funder Engagement: Emphasizing Impact and Work for “Those” Students

ML1 maintained active webpages, circulated promotional videos, and held formal fundraisers to engage potential and current funders. In its six documents intended for donor audiences, ML1 included descriptions of the organization’s mission, lists of current sponsors, and the investment options donors could pursue to support their work. Similar to other Birchwood CMOs, ML1 emphasized the organization’s focus on college and career preparation in its donor appeals. To illustrate, one donor webpage contained the following question and statement for interested funders: “Will you make College Guaranteed a reality for our students? ML1 relies on the hard work and help of many people to maintain high-performing schools. At ML1, we are changing the odds for our students.” The college focus was also evident in a donor promotional video, which showcased several students who shared their personal experiences attending ML1 schools and how it had nurtured their success and college aspirations.

While continuing allusions to their college focus, ML1’s formal donor event also included an emphasis on CMO impact, which was mentioned as a key selling point for funders in ML1 governance meetings. To illustrate, one white male ML1 founder spoke at their annual gala and provided his assessment of the ML1’s impact:

ML1 stands as a well-recognized and respected brand. It shows that you can better as you get bigger. Well beyond recognition in the Wall Street Journal and the New York Times or features on Oprah or Charlie Rose, people take notice. With our teacher models and instruction for students with special needs, our impact extends beyond California.

In his comments, the ML1 founder alluded to the media outlets that had provided positive publicity for the CMO’s brand and mentioned how the CMO influenced the education sector. The ML1 CEO, also a white male, quantified the organization’s impact in his introductory comments to the funder audience: “ML1 is the highest performing large poverty school district in the state. We serve over 10,000 students in over 30 schools across several states.” Through the founder and CEO’s description, ML1 leaders articulated this market-oriented appeal, which they believed would resonate with donor audiences and their interests.

In engaging donors, ML1 officials eschewed explicit racial messages, making only two total in their funder outreach. One of these was conveyed by a student as she identified herself racially in her comments on college attendance in a promotional video: “It’s obviously difficult to be undocumented because of the labels they put on me. Like some Latina, woman, undocumented. I want to show all them off.” The other was made by an ML1 investor at the formal gala as he compared the emergence of charter schools to the founding of American democracy. In his comparison, he emphasized the gradual progression associated with systemic change, noting, “Initially, it was white males that had the right to vote. Then it took another 50

years for Andrew Jackson to get poor white males to vote. Then another 50 years for the Emancipation Proclamation to give African Americans the vote.” These explicit racial references were the only ones made during ML1’s gala and were advanced in discussing a topic other than ML1 schools and its communities. Furthermore, this founder, another white male, equated the slow institutionalization of choice options to the allocation of citizenships rights for nondominant communities, implicitly aligning the organization in the pursuit of equity and democracy.

Conversely, ML1 employed a range of implicit racial messaging in their donor outreach. Like other CMOs, this was primarily done through visual imagery through testimonials or displayed images of students of color, which were included on four of the six donor webpages. In their language, ML1 most frequently described its students as low-income ($n=4$) or through other euphemistic phrases like “no matter their fortune in life.” In this racial framing, ML1 also positioned itself as distinct from its student population and in turn, constructed ML1’s student and family population as the Other. For instance, at the gala, the CEO shared:

My daughters all attend public schools because we are fortunate enough to live in a community where they have access to high-quality public schools. The neighborhood schools in many low-income areas across the country—those schools and students that attend them are struggling in school and in life. The fact that some families have choices and some don’t in terms of access—it’s that fact that ML1 exists.

Unlike GL2 and other Birchwood CMOs who emphasized their community rootedness, the ML1 senior leader discursively distanced himself from ML1’s student population, positioning himself as an outsider doing for “those schools and students.” While ML1 was distinct in this distancing move, the CMO similarly advanced deficit narratives of its students through testimonials. For instance, in her comments, a Black female alumnus described her younger self as “resistant, lazy, and downright unresponsive,” tapping into negative stereotypes of minority youth as unruly and in need of control, before describing how the teachers had helped her reform her orientation. She also described how she had been temporarily homeless while in college, choosing to pay tuition rather than secure consistent food and shelter because ML1 had instilled in her the importance of a college education. Throughout her statements, the former student continuously characterized ML1 as her primary source of guidance in light of challenging life circumstances, thus characterizing herself as deficient and passive.

While utilizing similar themes and discursive moves, ML1 showed some divergent patterns in its donor engagement. The CMO rhetorically emphasized the idea of impact and scale to appeal to donors and their perceived preference for the use of market principles in education. In its racial discourse, ML1 similarly used an array of implicit racial language to describe its work and its intersection with low-income communities of color. At the same time, ML1’s predominantly white leaders distanced themselves from their constituents in a distinct pattern that was not observed in the data of the other nine Birchwood CMOs.

Summary: ML1’s Color and Context-Blind Approach to Engagement

To maintain their organizational legitimacy, ML1 engaged teachers, funders, and parents through similar strategies, tropes, and race-based messaging that characterized the broader CMO population. With teachers, they advanced subtle racial cues within their emphasis on ML1’s strong professional learning context and advanced equity claims. For parents, they emphasized logistical school information and typically eschewed explicit or implicit racial framing with the

exception of social media where they highlighted school events and celebrations of racial group heritage. At the same time, ML1's policymaker and donor engagement was distinct from other CMOs in a few ways. With funders, ML1 emphasized the theme of impact and growth as it advanced implicit racial messaging and discursive distancing from its student population. For policymakers, it employed an array of explicit and implicit racial discourse in discussing college and collaboration, but eschewed allusions to restorative justice, whole child supports, and community connections. In omitting these final themes, ML1 emphasized its brand and forewent references to these ideas that were values held in the city and education landscape.

While well-established organizations may face growing obstacles in their efforts to maintain legitimacy, the development and enactment of ML1 coalition-building strategies suggested that the organization grappled with few external challenges beyond those related to practical school operations. Of note is the organization's lack of attention to the number of Latino students in its schools, which had been a point of contention for other CMOs. In facing few challenges, ML1 maintained a colorblind approach to both developing and implementing strategies and even rhetorically distanced its personnel from the students it served. This evidence suggests that well-established organizations adhere to dominant racial frames and attend less to sociopolitical concerns unless compromised.

Brand Legitimacy and CMO Racial Politics

The case descriptions illustrate how an organization's legitimacy status can influence their approach to coalition building. As RL1, GL2, and ML1 sought to engage stakeholders, they considered their organizational priorities and reputational standing in the competitive Birchwood context and enacted approaches that would address their brand needs. Table 7 provides an overview of the patterns elucidated in each case.

On one hand, a CMO's legitimacy status had little impact on the thematic emphases or racialized messaging they used to engage stakeholders. Each CMO deployed messages that would resonate with their target audiences in conjunction with coded appeals that would index race in their work. In addition, the CMOs selectively used explicit racial messaging with policymaker audiences, who represented the group most vocally concerned with the demographic homogeneity of the charter sector. Overall, RL1, GL2, and ML1 used both explicit and implicit racial appeals as symbolic and political resources in their coalition building. With policymakers, CMOs responded to anticipated critiques related to their student and teacher populations with explicit racial language. In engaging parents and teachers, CMOs deployed implicit appeals alongside positively connoted ideas that would symbolically align the organizations with racial justice causes.

In advancing these frames, the three CMOs also circulated contradictory racial messages to secure finite resources from stakeholders. Like the CMO population, RL1, GL2, and ML1 competed to garner support from actors who differed in their values, interests, power, and racial standing. To repair, elevate, or maintain their brands, they advanced positively connoted ideals (e.g., restorative justice, equity) alongside implicit racial messaging that would resonate with progressive Birchwood stakeholders and nondominant communities. At the same time, they presented deficit-laden characterizations of communities and constituents that would tap into "donor psychology," which reified negative understandings of racial groups and undermined their equity orientations. Overall, each of the CMOs were similar in that they conveyed competing racialized tropes despite their legitimacy status. In doing so, they conformed to colorblind racial norms while selectively adapting their racial messaging for local stakeholders

Table 7. Engagement Strategy Patterns for CMOs with Varying Legitimacy Statuses

	Strategy Development	Policymaker Engagement	Teacher Engagement	Parent Engagement	Funder Engagement
RL1: Repairing Legitimacy	<ul style="list-style-type: none"> • Focused on local & internal stakeholders • <i>Teachers</i>: race conscious • <i>Parents</i>: minimal race • <i>Funders</i>: - 	<ul style="list-style-type: none"> • <i>Themes</i>: compliance; school program; holistic education 	<ul style="list-style-type: none"> • <i>Themes</i>: staff appreciation, positive work environment 	<ul style="list-style-type: none"> • <i>Themes</i>: Logistics; school events 	<ul style="list-style-type: none"> • <i>Themes</i>: -
		<ul style="list-style-type: none"> • <i>Racial Discourse</i>: explicit & implicit race; visuals; restorative; deficit narratives 	<ul style="list-style-type: none"> • <i>Racial Discourse</i>: visuals 	<ul style="list-style-type: none"> • <i>Racial Discourse</i>: visuals; history celebrations; ethnic studies 	<ul style="list-style-type: none"> • <i>Racial Discourse</i>: -
GL2: Gaining Legitimacy	<ul style="list-style-type: none"> • <i>Teachers</i>: race conscious • <i>Parents</i>: race conscious • <i>Funders</i>: colorblind 	<ul style="list-style-type: none"> • <i>Themes</i>: school program; holistic education; community based 	<ul style="list-style-type: none"> • <i>Themes</i>: professional learning; collaboration 	<ul style="list-style-type: none"> • <i>Themes</i>: Logistics; school events 	<ul style="list-style-type: none"> • <i>Themes</i>: college & career
		<ul style="list-style-type: none"> • <i>Racial Discourse</i>: explicit & implicit race; visuals; restorative 	<ul style="list-style-type: none"> • <i>Racial Discourse</i>: explicit & implicit race; visuals; equity 	<ul style="list-style-type: none"> • <i>Racial Discourse</i>: visuals; history celebrations; implicit civil rights 	<ul style="list-style-type: none"> • <i>Racial Discourse</i>: implicit race; visuals; deficit narratives; changing the odds
ML1: Maintaining Legitimacy	<ul style="list-style-type: none"> • <i>Teachers</i>: minimal race • <i>Parents</i>: minimal race • <i>Funders</i>: colorblind 	<ul style="list-style-type: none"> • <i>Themes</i>: school program; college; collaboration; professional learning 	<ul style="list-style-type: none"> • <i>Themes</i>: professional learning; collaboration 	<ul style="list-style-type: none"> • <i>Themes</i>: Logistics; parent participation; effectiveness; school events 	<ul style="list-style-type: none"> • <i>Themes</i>: college & career; scale & impact
		<ul style="list-style-type: none"> • <i>Racial Discourse</i>: explicit & implicit race; visuals 	<ul style="list-style-type: none"> • <i>Racial Discourse</i>: implicit race; visuals; equity 	<ul style="list-style-type: none"> • <i>Racial Discourse</i>: implicit race; visuals; history celebrations 	<ul style="list-style-type: none"> • <i>Racial Discourse</i>: implicit race; visuals; deficit narratives; changing the odds

who displayed a high degree of race consciousness.

While converging in these ways, the three organizations did display critical differences related to their legitimacy status. First, the organizations differed in their attentiveness to the local context. As RL1 and GL2 sought to rebuild or grow their brands, they acknowledged the political context and common perceptions of their CMOs in developing their coalition-building strategies. Because of their circumstances, they anticipated external critiques that could affect network priorities and in turn, adopted racialized lenses to compete in the saturated CMO context. In contrast, ML1 focused on strategies related to their broader impact and operations because of its established and seemingly unchallenged presence. In addition, the CMOs differed in how they engaged current and prospective stakeholders. Because of RL1's controversial past, the organization focused on rebuilding trust with its current constituents and local board members. In its precarious state, the organization engaged in a form of coalition-building triage that required it to work on internal relationships before building a robust external marketing arm. Because GL2 and ML1 were established brands with reputes and strong organizational capacity, they developed and enacted external-facing efforts to address a variety of priorities.

The three CMOs also varied distinctively in how they foregrounded race in their marketing. Of the three CMOs, GL2 most openly centered race and enacted race-conscious strategies. Because they depicted themselves as an organization with deep community roots, they were committed to maintaining this lens, which coalesced with the city's social and political personality. At the same time, their need to compete caused them to forego explicit references to race, leading GL2 to conform to broader colorblind tendencies. While representing opposing ends of the legitimacy spectrum, RL1 and ML1 were the most colorblind in their stakeholder engagement. While they indexed race visually in their coalition-building efforts, they minimally acknowledged or enacted race-conscious engagement strategies. Thus, while these organizations maintained different priorities in terms of their legitimacy management, they both conformed to colorblind norms. For ML1 and its established brand, its colorblindness reflected the dominant organizational order. For RL1, who sought to recreate itself in the field, they mimicked these colorblind tendencies to establish a legitimate brand.

As CMOs seek to grow or maintain their organizations, they aim to legitimate their brands in an increasingly competitive landscape. To bolster their position in the marketplace, they cater to the interests of public and private audiences while advancing their organizational interests. In this pursuit, they draw upon competing and often contradictory frames to persuade stakeholders of their worth. Race and racial narratives are also tools strategically deployed in this process to legitimate one's organization. While local contexts can be characterized by a degree of race consciousness, neoliberalism and colorblindness constrain the use of explicit racial frames and in turn, compel actors to capitalize on race to compete for critical resources despite the implications that these actions may have for their equity orientations.

Chapter 9: Conclusion

From race-conscious social movements like Black Lives Matter to protests of the Trump administration's racist and xenophobic policies, the particularity of race as an oppressive force is again rising to the fore of the American psyche. The current political moment has exposed the continued entrenchment of racism in U.S. society. While many have consistently recognized and borne the weight of centuries of institutional racism, Americans who previously turned a colorblind eye to these processes are increasingly cognizant of how race influences daily manifestations of power, privilege, and oppression.

U.S. citizens have also witnessed the potency of racially coded appeals. Through the Trump campaign's use of subtle and overt racial rhetoric, the populace has seen the power of these cues and their ability to persuade individuals to support leaders who advance policies that run counter to their interests (Haney López, 2014). As these coded appeals stoke economic and racial fears, they reify negative understandings of communities of color, identifying them as the source of dwindling social and economic opportunity while obscuring the structural forces that oppress citizens across racial, political, and economic lines. While Republicans' rhetoric disseminates ideas that reify racial hierarchy, their opponents increasingly advance their own racial appeals to galvanize political resistance. From the recitations of "No Ban. No Wall." to the establishment of sanctuary cities, many employ coded and explicit racial frames to ground their opposition in a commitment to alleviating racial inequity.

Public sector officials advance their initiatives in this context of conflicting racial frames and sentiments. To secure support for their initiatives and institutions, leaders employ strategies and selective racial messaging to both convey their organizational vision and to garner support from varied audiences who maintain disparate values and interests. At the same time, they do so amid dwindling financial resources and an increasingly competitive and marketized environment, forcing leaders and policymakers to grapple with competing priorities. Leaders in the education sector contend with these same tensions emanating from the institutionalization of neoliberal policies and the evolving racial order. How do leaders respond to competitive pressures to build coalitions in support of their agendas? How, if at all, does their outreach address their organizational needs while conveying their commitment to alleviating racial inequity? How does the national and local discourse around race influence how leaders engage politically?

These questions drove this investigation of the coalition-building efforts of CMOs, whose leaders grappled with these tensions in managing their organizations in a competitive educational market. In this chapter, I provide an overview of the study's findings and describe its contributions to the research base on CMOs and the politics of education. I also describe the theoretical contributions of the study's interdisciplinary framework before turning to a discussion of its implications for policy and practice. I conclude by explicating the study's limitations and suggest areas for future research.

Findings Overview

The CMO leaders in the study sought to build coalitions to address their competing priorities through strategic engagement practices and the use of racial discourse. Using an embedded case study design, I analyzed the strategies of a population of ten CMOs operating in one urban district in California along with an in-depth analysis of three nested organizations. In addition to elucidating patterns across diverse organizations, the embedded analysis facilitated an

investigation of CMOs that varied distinctly in organizational status, demonstrating how efforts to sustain or gain legitimacy affected coalition building and CMOs' conformity to racial norms in the local and national context. My examination revealed that CMOs drew upon and reacted to the racial and sociopolitical climate in their efforts. They engaged in both implicit and explicit race-based political efforts to sustain their organizations and manage stakeholder perceptions, yet, in doing so, faced new challenges in maintaining diverse coalitions.

My findings suggest that race and racial discourse served as a political commodity that was variably deployed in CMO engagement efforts. To build coalitions with teachers and parents, CMOs used implicit racial appeals that morally and politically aligned their organizations with the advancement of racial equity and civil rights. For local policymakers, CMOs used both implicit and explicit racial language to deflect anticipated race-based critiques arising from the local context surrounding the marginalization of the city's Black constituents. With funders, these organizations utilized the testimony of parents and students of color to convey the organization's impact through beating-the-odds narratives that advanced common misperceptions of racial groups and urban communities. While varying in how race was acknowledged and the accompanying ideas that were conveyed, CMOs nonetheless strategically used race and racial frames that would resonate with their audiences to garner support in the competitive charter landscape. In this way, race and racial messaging operated as form of currency in CMOs' political efforts. Like the policymakers advancing education reform in the post-*Brown* era, CMOs used coded and overt racial appeals to create multiracial coalitions and circulated various justifications that would facilitate stakeholder support.

CMO efforts to align themselves politically and morally with disparate actors also yielded conflicting discursive frames. To sell their brand to multiple audiences, CMOs crafted and conveyed subtle racial narratives that aligned with what they perceived as the racialized values and norms maintained by stakeholder groups. For teachers and parents, these narratives were positively connoted. For funders and policymakers—groups who maintained financial, political, and/or racial power—CMOs circulated deficit-laden messaging that reified negative understandings of racial groups because it served a critical organizational purpose. In conveying these tropes to policymakers, CMOs created a justification for their institutional presence. With funders, CMOs stoked the fires of paternalism to persuade this target audience to invest in their organizations, but did so in a manner that would not challenge the racial or economic status quo. Overall, CMOs' use of competing racial frames served practical purposes in their competitive efforts to maintain organizational stability and brand legitimacy.

At the same time, advancing these incompatible themes has implications for their equity orientation. On one hand, the circulation of deficit-laden characterizations of communities of color in any context reifies negative understandings of racial groups. This discourse contributes to the reification of race-based structural inequities, and thus affects how the U.S. deals with race collectively. In addition, CMOs selectively deployed this discourse to sustain their organizations in the Birchwood context, revealing how competitive processes can drive equity-oriented leaders to employ racialized tactics that undermine their intent. Furthermore, the juxtaposition of these racialized frames begets questions of authenticity. The simultaneous advancement of incompatible frames can be perceived as disingenuous or contradictory by many stakeholders who perceive positively connoted frames as a selective legitimation tactic, which in turn undermines CMOs' commitment to racial equity.

The use of varied racial frames reflects the racial dissonance that characterizes the U.S. sociopolitical landscape. As equity-oriented organizations, CMOs consciously circulated

positively connoted ideas on race for key audiences to manage their perception as being on the right side of justice. In turn, CMO efforts to align themselves with race-conscious causes can be interpreted as a rhetorical move to distance themselves from the increasingly racist and xenophobic sentiments that pervade the political system and much of U.S. population. Conversely, CMOs were constrained in advancing racial commitments by the colorblind context that legally prohibits the use of race as a selection criteria and their need to cater to audiences who vary in the degree to which they adhere to colorblind ideals and practices. These constraints led CMOs to adopt colorblind language and frames in much of their stakeholder engagement despite their equity commitments. Overall, this dissonant racial context moved CMOs to circulate competing racial frames that simultaneously advanced and undermined this orientation.

While the selective deployment of race and its resulting incoherence thwarts CMOs' equity claims, a broader analysis of what this discourse is in service of generates additional questions about their orientation. Because CMOs used race to manage brand perceptions, race can be seen as utilitarian rather than a central or foundational CMO commitment. Furthermore, their implicit and explicit racial framing is disconnected from structural analysis or holistic policy platforms, thus diverting attention from root causes of oppression in favor of highlighting individualistic approaches to improving the circumstances for deserving students and families of color. Finally, while these relational and discursive strategies can secure coalitions that support CMOs' institutional presence, the broader research on CMO effectiveness is mixed. That is, CMOs can deploy powerful messages and political behaviors, but CMO reform itself strips traditional public schools of critical resources, variably generates equitable schooling experiences, and does not support systemic change. Like the waves of reform that came before it, the use of racially coded appeals to secure diverse coalitions in CMO efforts has yet to generate transformative change in the distribution of educational opportunities for students and families of color despite their espoused commitment.

The marketization of the U.S. education sector only promises to increase under the leadership of U.S. Secretary of Education Betsy DeVos, given her espoused commitment to school choice policies. In this context, CMOs are likely to remain critical actors in the landscape. At the same time, these organizations can be understood as a recent effort in a long series of reforms aimed to increase opportunities for marginalized racial groups. With increasing privatization on the horizon, this study reveals how equity-minded leaders respond politically and rhetorically amid pressures to compete and maintain their organizational brand. In needing to meet a variety of priorities, this study demonstrates how leaders who seek to advance racial equity can deploy racial tactics that undermine their orientation and further reify educational and racial inequity in the pursuit of organizational interest.

Contributions to Research

This study broadens understandings of CMOs with its keen attention to the racial and political behaviors of these growing actors in the education sector. It also enhances the politics of education research field through an original conceptualization of racial politics and innovative methodological approaches that can help scholars explore the continued presence of racial disparities despite the onset of policies that aim to further racial equity. I describe these contributions below.

Contributions to the CMO Research Base

Previous research on CMOs examined the sector's growth, its achievement patterns, and the central office practices that support CMO sustainability. While providing important insights, researchers have generated a limited assessment of how race operates in these reform efforts. With the predominance of descriptive and statistical analyses, scholars examining CMOs have treated race as a variable and quantified its impact on communities of color. Yet, this methodological approach inhibits researchers from capturing how race circumscribes CMO practices at the local level. This qualitative study captured how race continuously influenced CMO relational-building practices. As organizations that espouse a commitment to educational equity for marginalized groups, the study revealed how racialized approaches can facilitate stakeholder engagement while confounding CMO equity claims. Overall, this research provides a critical complement to quantitative studies by exposing how racialized behaviors are manifested in organizational processes.

Methodologically, this study's use of publicly available data also contributes to the research base on CMOs by advancing an alternative way for scholars to empirically investigate their practices. Because CMOs and charter schools are privately operated, researchers have faced obstacles in gaining access to conduct research in these settings. While I obtained authorization to interview CMO leaders, the documents I amassed and observations I conducted were publicly accessible. When triangulated and analyzed collectively, these sources provided important data on CMO decision making, strategy development, and coalition-building efforts. Scholars seeking to develop insights into the processes of these public-private institutions should consider observing public meetings and amassing publicly available data to investigate CMO and charter organizational behaviors.

Contributions to the Politics of Education

In addition to the scholarly research on CMOs, this study contributes to the politics of education field in several ways. First, CMOs have been typically subsumed in broader investigations of charter politics, making it challenging to distinguish if these organizations display unique political behaviors. In the few instances when CMOs have been the research focus, scholars have advanced broad assessments of CMO proliferation and the networks that undergird it. This study contributes to the field with its exclusive focus on CMO politics and the microlevel, relational practices that CMO leaders deployed to sustain organizational stability and legitimacy. In examining these political behaviors, this research elucidated how competitive pressures and sociopolitical contexts affected CMO political behaviors and revealed how these actors sustain or grow their organizations in urban contexts.

In examining racial politics, I join the growing number of scholars who acknowledge and center race in political analyses, pushing against the colorblind tendency of the field (López, 2003). In addition, the study contributes with its focus on CMOs and its microlevel racial politics. Scholars have examined race in the context of CMO politics, generating broad assessments of CMO behaviors and analyzing racialized tactics as they intersect with shifts in the local political economy. While providing key insights, scholars have rarely captured the microlevel political and racialized behaviors these organizations display, which have implications for their ability to foster authentic and equitable partnerships. With its focus on the racial politics CMOs deploy to sustain their organizations, this research demonstrated how these actors operated politically and racially at the local level and revealed the rigidity of racial structures and ideologies even among leaders who seek to advance race-conscious narratives.

My empirical attention to racial discourse also provides insights for educational policy and politics scholars. This study demonstrates how discursive analyses can be methodologically incorporated into policy scholarship through Critical Discourse Analysis (CDA) to capture how language and power are enacted in political processes. Scholars have previously employed CDA in educational policy analyses (Falk, 1994; Thomas, 2002; Woodside-Jiron, 2011), yet it remains an underutilized methodological approach in comparison to other traditional quantitative and qualitative approaches, which can provide greater external validity. Despite its underutilization, CDA provides insights into the relationship between language and broader sociopolitical processes. It facilitates both a linguistic and social analysis, which can reveal the nuanced manner in which race relations are maintained and ways in which policies may fail to mitigate inequities (Taylor, 2004). U.S. citizens are increasingly aware of the tangible and political effects that racialized discourse has in advancing policies that protect the most affluent and most recently, in enabling the election of Donald Trump and his slew of discriminatory policies. While individuals are cognizant of the potency of these racial cues in U.S. politics, how coded appeals operate in education remain comparatively less understood. As potent political tools that move audiences to support policy platforms, it is important to trace how racial discourse is deployed in education policy efforts.

Contributions to Theory

In addition to enhancing the research base, this study has theoretical contributions. Few studies employing urban regime theory or other political frameworks incorporate an explicit theory of race in political analyses and thus fail to capture the multifaceted manner in which race operates in reform. Without a theory of race, political analyses focus on the behaviors and perspectives of racially identified actors and the advancement of their interests in policy efforts. In analyzing race in this way, scholars pay insufficient attention to the structures and informal practices that expose race as system of power in political processes (Horan, 2002). By synthesizing tenets from political science and sociology, I showed how race remains a central organizing societal principle that influences the formal and informal political practices of CMOs. Through sociological concepts related to racial representation and discourse, I also demonstrated how race is a dynamic concept that evolves in traditional political processes like coalition governance. This original conceptualization of racial politics reveals how interdisciplinary syntheses can broaden how scholars conceptually and empirically investigate race and its intersection with political processes.

The conceptual approach guiding this investigation also provides contributions in its attention to racial discourse. Regime theorists suggest that leaders develop strategies to engage various actors to secure their support in coalitions or to quell opposition to a given policy. While research tells us that reformers craft messages around their target populations to persuade audiences of a policy's benefit (Schneider & Ingram, 1993), scholars employing urban regime theory have rarely assessed the content embedded within the political or racialized discourse leaders use in coalition building. Instead, they have only considered the degree to which leaders of color foreground race-related issues in their engagement of different stakeholders. Because of race's structural and sociological influence on political processes, I theorized how the dominant racial ideology of colorblindness influenced the engagement and discursive strategies leaders used in their engagement efforts. Through Bonilla-Silva (2006) and van Dijk's (1999) colorblind linguistic devices, I showed how leaders reified, adapted, or deviated from these dominant racial frames in conveying messages to various audiences. This synthesis provides insights to scholars

who seek to understand how race and racial issues are foregrounded in political processes and the racial subtexts embedded in leaders' approaches.

Implications for Policy and Practice

While this study focused exclusively on the CMOs operating in Birchwood, it is also an investigation about leadership and organizational behavior amid the growing marketization of the public sector and the evolving racial context. In the face of growing competition and dwindling public resources, many public officials seek to advance their organizational interests while maintaining their democratic and equity commitments. How do equity-oriented leaders respond to growing competitive pressures while furthering their racial equity missions? How do they build supporting coalitions that advance organizational priorities and foster culturally responsive practices and relationships? My findings are particular to Birchwood, but they have important implications for policymakers and practitioners, who are often equity minded but increasingly conduct their work in competitive, marketized contexts.

First, in crafting and enacting policies, policymakers should anticipate and address the political and normative dimensions that surround their proposed initiatives. Many scholars have shown how politics and normative values impede the enactment of equity-oriented reforms (Oakes, 1992; Trujillo, 2012b), yet these dimensions remain neglected in policy development and implementation. Instead, policymakers most frequently attend to the technical aspects of reform in crafting or evaluating a policy's impact. In schools, these technical features, which include instructional programs, pedagogical approaches, and assessments, are those whose impact can be quantitatively assessed, enabling policymakers to determine the program's effectiveness and its ability to advance racial equity. This study suggests that policymakers need to expand their foci to attend to the sociopolitical factors that surround and undergird reforms to consider how these dimensions complicate efforts to advance equity. The relationships surrounding a reform's implementation set the conditions for governance and learning in schools, and thus, are necessary features that policymakers must attend to if they aim to alleviate inequity. To address these reform dimensions, policymakers should create and commit to structures that enhance community input and facilitate democratic participation in both charter and traditional public school settings. These structures can include systems for soliciting and incorporating parent, student, and community input, and the inclusion of performance indicators that assess the level of civic effectiveness, community satisfaction, and democratic participation. These systems would provide community accountability on the priorities and approaches schools advance and inhibit the appropriation and disparagement of local communities by stakeholders who may display disproportionate influence.

This research also suggests that educational leaders and practitioners should embrace a more multidimensional definition of equity. Rather than narrowly defining equity in terms of academic or test-based outcomes, practitioners must acknowledge that the manner in which relationships are fostered can inhibit or advance racial equity. The work of educational leaders is inherently relational and political. As charter leaders and traditional public school leaders navigate urban contexts and engage with various racial groups, they seek to secure strategic advantages and meet their organizational needs by obtaining stakeholder support. As this study showed, leaders engaged in this process can exhibit harmful and derogating tactics to ensure their institutional presence. To counteract these practices, school and district officials should commit and invest in systemic teacher and leader professional development that deepen practitioners' understandings of implicit racial bias, community assets, and broader systems of

disadvantage. These learning opportunities should engage leaders and school officials in a systematic reflection of their stakeholder engagement and its accompanying messaging to identify culturally responsive strategies or instances in which they reified negative perceptions of nondominant communities. The language and ideas leaders employ about their constituents have implications for the work they do. Discourse and ideas advance particular educational problems and in turn, constrain the possible remedies leaders prescribe. Reflecting upon these relational and discursive practices can enable practitioners to build equitable partnerships and more holistically assess how their organizations reify or mitigate racial inequity.

Limitations

While advancing important contributions, this study has limitations. As an embedded case study of the CMOs operating in one urban district in California, its findings are not generalizable to CMOs operating in other geographic regions. As this study suggests, CMOs respond to localized political and social factors when devising and enacting their coalition-building strategies. While colorblindness and its racial norms may influence CMOs operating in other regions given its ideological dominance, this study suggests that an investigation of CMO behaviors necessitates a sensitivity to local context. Thus, while this study advanced theoretical contributions with regard to racial politics that can inform future studies, its findings are limited in their explanation of the behaviors of CMOs beyond Birchwood.

The inability to gain access to CMOs also limited the data sources amassed to analyze stakeholder engagement. Without permission to conduct research in these organizations, I was limited to utilizing data that was publicly available and observable. While this innovative approach enabled me to gather a variety of data sources, it inhibited me from attending many events like fundraisers and parent meetings and from gathering evidence on CMOs individualized recruitment efforts. Observing these efforts was beyond the scope of this study's design because it would have required organizational permission to shadow and document the events. Relatedly, with minimal access to CMO personnel beyond those willing to be interviewed, I only observed the development of engagement strategies at charter board meetings. While observing these governance meetings did provide evidence of decision-making processes, discussions of stakeholder outreach were not always observable and depended on the meeting agenda. Gaining full access to CMOs would have enabled me to speak with CMO leaders more frequently about coalition building and to more thoroughly understand how CMO strategies were created and enacted.

Finally, the use of embedded case study methodology enabled me to provide a holistic assessment of CMOs' political and racial behaviors while elucidating nuanced differences among three nested cases. While the embedded case analysis counteracted the abstraction that can be advanced in holistic case analysis, my comparison of CMOs along the criterion of legitimacy status was but one way to capture the nuanced differences that exist among CMOs. The CMO sector in Birchwood and other geographic regions is diverse. CMOs vary in size, growth style, organizational history, and pedagogical approach. Each of these organizational features has implications for coalition building and the enactment of culturally responsive and democratic engagement efforts. While legitimacy status emerged as a critical point of comparison in the iterative data collection and analysis process, future research should compare and contrast CMOs along other criteria to further elucidate key differences and similarities among these disparate organizations.

Future Research

The findings from this study suggest several directions for future research. First, this study centrally focused on the CMO population in Birchwood. As an exemplar case, it illuminated the racial politics that circumscribed their efforts in a context that could generate descriptive and theoretical insights. To build a more robust empirical and theoretical base on CMO racial politics, future research should investigate CMOs' local political behaviors and their intersection with race in various geographic regions. Examining the similarities and differences that exist between and among CMOs in different regions can generate stronger analytic conclusions about the distinct political and racialized behaviors of these growing actors.

Future research should also investigate CMO racial politics through in-depth studies at the local level. This study's assessment of the strategies enacted by all of the CMOs operating in one urban area provided ample opportunity to identify patterns across the array of organizations, which varied in size, growth approach, and pedagogical approach. At the same time, gaining access to local CMOs for in-depth or comparative study can generate more detailed and comprehensive insights into the development of coalition-building strategies, the enactment of individualized stakeholder recruitment, and the degree to which race and power influence that process.

The expansion of school choice programs and charter school options in urban districts across the U.S. will likely increase in the upcoming years under the Trump administration. In this process, both charter school and traditional public school leaders will be challenged to contend with the growing number of competitors amid a variable pool of resources and supporters. To compete in this market, leaders will have to balance their organizational priorities alongside their espoused belief in the power of schools to mitigate racial inequity. This study provided an eagle eye view of how these processes take place for CMO leaders across one urban district, but future research should more closely examine how charter school and traditional public school leaders balance the fulfillment of practical organizational needs while advancing their equity commitments. Through ethnographic methods and more frequent, in-depth interviews with school leaders about the competitive challenges they face, researchers can elucidate the internal decision-making patterns and reflective practices that leaders employ to address their practical and ideological commitments. Scholars investigating leadership and organizational behavior in other public sectors who are experiencing similar market shifts should also consider using in-depth case analyses to examine how officials attend to competing priorities in the context of their work.

Finally, in investigating the strategies that CMOs implement to engage stakeholders, my study revealed the centrality of charter school boards in the strategic actions and approaches of charter networks. Traditionally, school board meetings have been intended to be local democratic hubs—spaces where community members can articulate and debate their perspectives on education policies and hold their elected school board members accountable (Tyack, 2002). While many market-oriented reformers and scholars have critiqued school board politics as problematic and ineffectual (Doyle & Finn Jr, 1984; Hill, Haycock, & Maranto, 1999), charter board governance is intended to function in a similar fashion. Albeit with key differences related to school board appointment, charter board meetings are democratic spaces wherein concerned parents and members of the public can make public comment, observe organizational decision making, and potentially influence policy. Despite the pivotal role of this key decision-making body, little empirical research exists on charter school boards. Furthermore, this study's findings suggest that organizational needs, including increased political clout, facilities, and fundraising,

often dictate the selection and recruitment of board leaders, which has implications for board representation and community responsiveness. Future research should examine these critical governance spaces and how board representation influences CMO strategy, school policy, and the democratic and equitable responsiveness of these governing bodies.

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Appendices

Appendix A: Interview Protocols

Protocol 1: Understanding the Birchwood Context

Introductory comments:

Thank you for taking the time to meet with me today. As I mentioned before, I am a doctoral candidate at UC Berkeley and my dissertation focuses on how charter school networks establish, expand, and/or sustain their presence in Birchwood. In particular, I am curious to explore how CMO networks interact with and engage different groups of individuals in growing or maintaining their schools and organizations. I got interested in this topic after working in public schools for nine years—4 of which were spent at a prominent charter network.

An important part of this study is understanding Birchwood's educational and political landscape, which is where I was hoping you could provide some insight. I hope to better understand the ways in which individuals have experienced Birchwood's educational system, its various waves of "reform" or policy, and the politics, tensions, and opportunities that have arisen throughout the process.

If I have your permission, I would like to record this interview. Please feel free to stop the recording or interview at any time. Do you have any questions for me? Thank you and let's get started!

Interview Questions:

1. Tell me about your background.
 - How long have you been living/working in the area? Birchwood?
 - Tell me about your professional experiences.
 - What are your connections to Birchwood schools?
 - *Possible rephrase:* How did you come to be involved in Birchwood schools?
2. When you think about Birchwood schools over the past few decades (*OR since you've been here*), what have been the major highs and lows?
 - Tell me about (*major Birchwood reform-list of policies below*). What did this policy mean for Birchwood schools and the community? [*Repeat for each policy if not mentioned in original response*]
 - Policies/Reforms for Inquiry:
 - State takeover
 - Small schools
 - Current strategic plan
3. What has the expansion of charter schools meant for Birchwood? For the community?
 - How, if at all, have charter schools (and/or CMOs) helped Birchwood?
 - How, if at all, have charter schools (and/or CMOs) negatively affected Birchwood?
 - *Possible rephrase/probe:* What disadvantages or problems have you perceived from charter school growth? CMO growth?

- What about charter networks?
 - What differences, if any, do you see between stand-alone charters and charter networks?
4. What in your opinion are barriers for progress in Birchwood public schools?
 5. Who are the major movers and shakers in the Birchwood schools? Who gets things done or makes things happen?
 - *Probe to discuss particular groups (e.g., school board, city officials, teachers' unions, advocacy groups)*
 - What influence do XX have?
 6. Who's left out of the major decision making in Birchwood schools? Why do you think that is?
 7. I want to talk a bit about community engagement around education and educational reform. What does community engagement around education look like in Birchwood?
 - Who initiates it? Who is the most active?
 - What issues are at the center of engagement efforts?
 - How effective are community engagement efforts in your opinion? What makes them effective? Ineffective?
 - What message(s) do community engagement efforts send?
 - Describe an example of how the community was engaged around education.
 8. Birchwood is one of the most ethnically and socioeconomically diverse cities in the country. In what ways have you seen class be an issue in schools or educational reform?
 9. In what ways have you seen race be an issue in Birchwood schools?
 - What do the relations between the African-American and Latino communities look like, from your standpoint?
 - *[If relevant]* From where do you think the black/brown tensions stem?
 10. How have schools/district served Birchwood's more racially or socioeconomically marginalized groups?
 - What has been the response of these groups to the school reforms? Why?
 11. How democratic have Birchwood's schools been in times past? How so?
 12. How equitable have Birchwood's schools been in times past? How so?
 13. What would a democratic, equitable Birchwood school district look like for you?
 14. *If not already mentioned in interviews, ask participants to clarify their racial background, social class upbringings, and geographic roots/affiliation in Birchwood as final questions.*

Protocol 2: CMOs Leaders & Personnel: Strategies for Sustainability

Introductory comments:

Thank you for taking the time to meet with me today. As I mentioned before, I am a doctoral candidate at UC Berkeley and my dissertation focuses on how charter school networks establish, expand, and/or sustain their presence in Birchwood. In particular, I am curious to explore how CMO networks interact with and engage different groups of individuals in growing or maintaining their schools and organizations. I got interested in this topic after working in public schools for nine years—4 of which were spent at a prominent charter network.

Today, I hope to learn much from you about how your organization's approach to growing/maintaining your network. Specifically, I'm curious to learn about the logistical aspects of growing/sustaining your organization, including the strategies you employ in building support and your rationale in using those strategies. I'm also interested in hearing about the successes and challenges you have encountered in building support for your organization.

Interview Questions:

1. I'd like to start to out by hearing a bit about you and how you became part of (CMO).
 - What is your role?
2. How would you describe (CMO)'s mission?
 - How is (CMO) improving education?
 - What problem is it solving? How?
3. I've read a bit about (CMO)'s history from the website, but I'd like to hear your side of that story. Tell me about (CMO) and how it got established and how it's grown over the years.
 - How long has (CMO) been in Birchwood?
 - How do/did you decide where to open your schools?
 - Are you planning on expanding? If so, how? When? Where?
 - If not, why not?
 - Describe some of the challenges you and your organization have faced as you've grown and/or sustained your network.
4. What communities do you serve (geographic, socioeconomic)?
 - How would you describe them?
 - Why this particular community rather than others?
 - Why does this population need (CMO)'s support and efforts?
 - *Probe for racial demographics if he/she answers with income-related or other criteria.*
 - What are [racial group's] needs?
 - *Differentiate by racial group for clarity.*
 - How does (CMO) meet [racial group's] needs?
 - What challenges does (CMO) face in serving this student population?
 - How else might [racial group's] needs be served?
5. In growing and/or sustaining your network, who are the key players *within* the organization that make this happen?

- What do they do? (*OR* What role do they play in growing or maintaining your organization?)
 - How do they foster support for your organization?
 - *Possible probe:* Whose support do they solicit?
6. Who are the key groups or individuals *outside* the organization that play an important role in sustaining and/or growing your organization?
- How do they support the process?
 - Why is their support necessary?
7. I want to talk a bit more about these groups of individuals outside of your CMO that you mentioned play a role. [*Mention those stated*]
- *Address each group mentioned with the following questions:*
 - Describe some of the things you do to reach out to (group/individual).
 - *Possible Rephrase:* What do you do to bring XX on board?
 - What do you do to convince them that your CMO is the right place to XX (e.g., send their children, invest in, support politically)?
 - What messages do convey to them?
 - Describe some of the events or strategies you use to reach out to (group/individual).
 - How do these events/strategies get developed?
 - *Ask the above question about the following groups if not already mentioned:*
 - Donors/funders
 - Policymakers (e.g., city council, school board members)
 - Community members and/or community organizations
 - School district officials (e.g., superintendent, charter authorization staff, etc.)
 - Parents
 - Business partners (e.g., contractors, real estate agencies, other)
8. How successful have you been in generating support from all of these groups and individuals?
- How effective have your events/strategies/approaches been?
 - How would you compare the strategies you use to engage them? How do the messages differ?
9. What has the expansion of charter schools meant for Birchwood? For the community?
- How, if at all, have charter schools (and/or CMOs) helped Birchwood?
 - How, if at all, have charter schools (and/or CMOs) negatively affected Birchwood?
 - i. *Possible rephrase/probe:* What disadvantages or problems have you perceived from charter school growth? CMO growth?
 - What about charter networks?
 - What differences, if any, do you see between stand-alone charters and charter networks?
 - What role does race play in CMO/charter efforts?
 - Describe any conflicts or challenges that have arisen that are race-related.
 - *Probe for specific instances, details.*
 - How, if at all, has race been an asset in expansion efforts?

- *For CMO leaders:* How do you take the race into account when planning to grow your organization?

10. How do you think (CMO) is doing right now?

- How is XX doing in regards to their mission? Equity? Class? Race?
- What is your sense of how others view (CMO) and the work you do? Why?
 - *Probe:* How do you think other charter networks operating schools in Birchwood are perceived? Why?
- What would you like to improve? Why?

11. *If not already mentioned in interviews, ask participants to clarify their racial background, social class upbringings, and geographic roots/affiliation in Birchwood as final questions.*

Protocol 3: CMO Coalition Members & their Perceptions

Introductory comments:

Thank you for taking the time to meet with me today. As I mentioned before, I am a doctoral candidate at UC Berkeley and my dissertation focuses on how charter school networks establish, expand, and/or sustain their presence in Birchwood. In particular, I am curious to explore how CMO networks interact with and engage different groups of individuals in growing or maintaining their schools and organizations. I got interested in this topic after working in public schools for nine years—4 of which were spent at a prominent charter network.

I know that you have worked with (CMO) as a XX, and I was hoping to hear about the work you do and your perspectives on the organization in general. I'm also interested in hearing about the successes and challenges you think the organization has encountered as it has tried to build support for its schools and broader network.

If I have your permission, I would like to record this interview. Please feel free to stop the recording or interview at any time. Do you have any questions for me? Thank you and let's get started!

Interview Questions:

1. Tell me about yourself.
2. How did you come to learn about (CMO)?
 - What drew you to the organization?
 - Why this CMO and not another charter?
 - Why did you want to be involved?
 - How did (CMO) convince you to come on board?
 - *Describe the interaction/event/approach.*
3. How would you describe your involvement with (CMO)?
 - *Probe to assess if level of involvement is typical or atypical of the stakeholder group he/she reflects*
 - What role do you think [*interviewee's stakeholder group-parents, funders, community organizations, etc.*] play at (CMO)?
 - How much influence do you think you have in CMO efforts [*or school site if applicable*]? How so?
 - *Probe for specific incidents/examples to illustrate.*
 - Who else is important to maintaining/growing (CMO)?
 - What role(s) do they play?
 - *If individuals inside the organization are stated, ask for those outside the organization: What about those outside of the organization? Who plays an important role?*
 - How much do you engage with (*others mentioned*)?
 - *Describe those interactions. (Probe for frequency, level of engagement, details surrounding interactions)*
 - You've mentioned several different people and groups involved in supporting

(CMO). How would you describe the relationship among these groups and individuals?

4. What communities does (CMO) serve (geographic, socioeconomic)?

- How would you describe them?
- Why do you think (CMO) works with this community?
 - *REPHRASE*: Why does this population need (CMO)'s support and efforts?
- *Probe for racial demographics if he/she answers with income-related or other criteria.*
 - What are [*racial group*'s] needs?
 - *Differentiate by racial group for clarity.*
 - How does (CMO) meet [*racial group*'s] needs?
 - How else might [*racial group*'s] needs be served?

5. What challenges or opportunities does (CMO) face in serving this student population? Broader community?

- What role does class play in students' lives? In their community?
 - *Possible rephrase*: What role does economic opportunity play?
 - How, if at all, do you think class affect how (CMO) engages with communities?
- What role does race play in students' lives? In their community?
 - How, if at all, do you think race affect how (CMO) engages with communities?

6. How successful has (CMO) been in generating support from all of these groups and individuals?

- Why do you think they have been so (in)effective?
 - *Probe for examples of approaches and strategies observed by interviewee.*
- Describe any challenges you have observed in terms of (CMO) garnering support.
 - Who did the challenge or issue involve?

6. How would you demographically describe those leading/supporting (CMO)?

- How does it align with the populations you serve?
- Is the (mis)alignment an asset? Problem? How so?
- How is XX doing in regards to class? Race?
 - How can/should it improve?

7. How do you think (CMO) is doing right now?

- What could they improve? Why?
- What do they need to do to maintain your support?

8. *If not already mentioned in interviews, ask participants to clarify their racial background, social class upbringings, and geographic roots/affiliation in Birchwood as final questions.*

Appendix B: Observation Guide

Pre-observation Communication: (Description of email communications, etc. had with CMO personnel before attending board meeting)

Description of Physical Environment & Attendees: (e.g., number of members of the public, CMO staff and board members, seating arrangements, location)

Running Record of Meeting Discussion: (Main points made during each portion of the meeting)

Agenda Item	Presenter Comments	Discussion Points (<i>if applicable</i>)

Appendix C: Codebooks

Codebook 1: CMO Description and Strategies		
Parent Code	Child code	Code Description
CMO and Charter School Description <i>(Descriptive details about each CMO and its approaches)</i>	Org History	Describes the organization's history
	Grades Served	Indicates the grade levels that the various schools and/or rationale for focusing on these grade levels
	Growth	Describes the growth of the organization over time (<i>may overlap with history</i>) and its general orientation to scaling up <ul style="list-style-type: none"> EX: growing number of schools, growth in other geographical locations, org PD branches/technology
	Programmatic Design	Describes the organization's instructional approach, curriculum, and/or the programs offered (<i>e.g., general approaches and structures, interventions and enrichment, SpEd, ELLs</i>)
	Org/School Culture	Describes features of the organizational or school culture/environment that are nurtured in the context (<i>could be desired or real</i>) <ul style="list-style-type: none"> EX: <i>sense of family, small school</i>
	Geographical Description	Provides descriptions and characteristics of the community that the org serves (NOT list of geographical areas)
	Governance	Describes the organization's governance approach (<i>e.g., distributed leadership</i>), the governance practices within the organization (<i>e.g., charter board, school site councils</i>) and the responsibilities imparted to each decision-making body
	Student Population	Describes their current or the targeted student populations of the organization and/or school
	Parent Participation	Describes required and/or encouraged parental participation practices
	Values/Core Beliefs	Indicated values or core beliefs that lay at the foundation of the school or organization <ul style="list-style-type: none"> Can be listed simply as list of values (<i>e.g., rigor, high expectations, love</i>) or can be explained in full sentences (<i>e.g., At XX, we value a sense of...</i>)
Mission/Vision	Indicated mission/vision behind the organization's efforts and/or their vision for students (<i>e.g., lifelong learners, model citizens</i>)	

	Partners	Describes the donors or community or external organizations that support the organization’s work or collaborate with them
	Performance	Describes the achievement levels of their student populations (<i>e.g., test performance, graduation rates, college matriculation rates, lists of colleges students attend</i>) <ul style="list-style-type: none"> • Often coexists with data persuasive tool
	Behavioral Management	Describes the organization/school’s specific approach to behavior management and its general reference to behavior and character development
	Finance	Describes the various funding sources and/or the manner in which organizational funds are used (<i>e.g., after school programs, technology</i>)
	Professional Development (PD)	Describes any specific and unique professional development approaches and supports in place <ul style="list-style-type: none"> • <i>Exempt: Required language around teacher supports in charter petition—very general</i>
	Teachers	Describes current teaching staff and/or desired qualities for new teachers (<i>e.g., expected practices, requirements for position</i>)
	Leadership	Describes demographic, professional, personal, etc. descriptions of organizational leaders including senior leaders and board members
	Collaboration	Describes organizational efforts to collaborate with district, charter advocacy groups, and other charter schools
	Other	Place holder category for other details that don’t fit elsewhere but grab my interest (<i>availability of school lunch, job descriptions</i>)
Stakeholder Engagement (<i>Describes the strategies held to</i>	Communication channel	Describes the general communication avenues or opportunities for the public and/or stakeholders to initiate conversation with the org (<i>e.g., Let’s talk forums, Submit questions</i>)
	Translated Materials	Documents and statements as translated for targeted or expected audience <ul style="list-style-type: none"> • Applied to titles/language that notes what is being translated (entirety of translated materials is not coded)
	Community Engagement	Events or activities organized to engage and build relationships with surrounding and broader community (<i>e.g., ribbon cutting ceremonies, jog-a-thons</i>) <ul style="list-style-type: none"> • Also refers to events put on by CMO community organizers

<i>engage a variety of stakeholders including teachers, parents, students, and donors)</i>	Funder/Donor Engagement	Events or activities organized to engage and build relationships with current and potential funders or donors (<i>e.g., individuals, foundations, corporations</i>)
	Student Engagement	Events or activities organized to engage and build relationships with current and prospective students
	Policymaker Engagement	Events or activities organized to engage and build relationships with policymakers (<i>e.g., board members, district staff, state/local policymakers</i>)
	Teacher Engagement	Events or activities organized to engage, recruit, and build relationships with prospective and current teachers (<i>e.g., recruitment happy hours, teacher appreciation evenings</i>)
	Parent Engagement	Events or activities organized to engage, recruit, and build relationships with prospective and current parents and families
Persuasive Tools & Tactics <i>(Devices used by CMOs to garner support from stakeholders)</i>	Teacher/Staff Testimonial	Quotes, video, or observed comments provided by former or current teachers about their experiences working at respective CMO <ul style="list-style-type: none"> • Can apply to actual comments shared in org materials and the presence of a testimonial alone
	Student Testimonial	Quotes, video, or observed comments provided by former or current students about their experiences attending respective CMO <ul style="list-style-type: none"> • Can apply to actual comments shared in org materials and the presence of a testimonial alone
	Family Testimonial	Quotes, video, or observed comments provided by former or current families about their experiences at respective CMO <ul style="list-style-type: none"> • Can apply to actual comments shared in org materials and the presence of a testimonial alone
	Community Member Testimonial	Quotes, video, or observed comments provided by anyone from outside the organization about their experiences at respective CMO <ul style="list-style-type: none"> • Can apply to actual comments shared in org materials and the presence of a testimonial alone
	Student Work, Artifacts, or Presentations	Details, events, activities showcased in CMO materials that include student work, artifacts, or presentations
	Celebrated School Events & Activities	Discussion or presentation of general school or organization-related events and activities (<i>e.g., university visits, guest speakers, first day of school</i>)

	Data	The presentation of data, statistics, research reports, etc. that showcase the organization or school’s performance and impact
	Accolades & Awards	Discussion on of awards, honors, notable affiliations, endorsements, or accolades bestowed upon the school or those affiliated with the CMO (<i>e.g., teachers, principals, board members</i>) by external organizations, newspapers, etc.
Rhetorical Themes (<i>Discursive messages articulated by CMOs in their efforts & materials</i>)	College-Focused and/or College & Career	Captures instances in which organizations emphasize their focus on college readiness, college completion, and/or college preparation (<i>Also includes the phrase “college & career” and “cradle to career”</i>)
	District Comparison	Captures instances where CMOs discuss the district’s practices and performance in relation to their own
	Whole Child	Captures phrases and language that emphasizes the CMO’s attention to the whole child (<i>e.g., whole child, social/emotional learning, wraparound services</i>)
	Citizenship	Captures phrases and language that emphasizes developing citizens or participation in democracy
	Restorative	Captures phrases and language that refer to restorative justice
	Economy	Captures phrases and language that refer to developing workers, references to the workplace, general productivity, and/or preparation for participation in economy (<i>References to College & Career & 21st century may also be marked with economy code</i>)
	Family	Captures phrases and language that refer to family (EX: <i>We are a family; Team & Family; Families as partners</i>)
	Character	Captures phrases and language that refer to character development
	21 st Century	Captures phrases and language that refer to 21 st century skills or teaching/learning practices (<i>e.g., computers, technology, changing the factory model</i>)
	Professional Learning	Captures phrases and language that refer to professional development, growth, innovative practices, and leadership opportunities
	Culture	Captures phrases and language that refer to the cultural characteristics of the organizations (<i>e.g., collaborative, like-minded</i>)
Community	Captures phrases and language that refer to surrounding/local community, community responsiveness, or a focus on the collective (<i>e.g., We respond to needs in the community; We work for community health and improvement</i>)	

	Transformation	Captures phrases and language that refer to transformation or transforming (<i>e.g., transform our community; transforming public education</i>)	
	Equity & Social Justice	Captures phrases and language that refer to social justice (<i>e.g., agents of change, justice</i>)	
Racialized Discourse (<i>Language used in CMO documents that explicitly or implicitly mentions race or race-based practices and approaches</i>)	Explicit Racial Reference	Language or descriptors employed make an explicit reference to race (<i>e.g., minority, racial, race, XX of color, Black/Brown, Latino, African-American, etc.</i>)	
	Income Descriptor	Utilized language or descriptor includes a reference to income (<i>e.g., low-income, socioeconomic, free and reduced lunch</i>)	
	No Image	Org document contains no human images <ul style="list-style-type: none"> When applying this code, apply on title or top of document to signal that no image is present in the entire document 	
	Image of POC	Image(s) on page or video feature student, parent, teacher/staff member of color	
	Immigrant	Utilized language or descriptor includes a reference to immigrant status (<i>e.g., newcomer, immigrant</i>)	
	Other Deracialized Descriptors	Utilized language or descriptor includes the following: <i>inner city, at risk, underserved, disadvantaged, 1st generation college going, diverse, regardless of background</i>	
	Racial representation	Made explicit racial reference in describing the composition of CMO leadership/staff or in describing diversification efforts	
	Civil Rights Reference	CMO alludes or specifically made reference to civil rights, social justice, and/or prominent civil rights leader	
	Culturally Relevant Practice	CMO describes/signals the use of culturally relevant practices and/or practices that they employ that are suited for their student and family demographics	
	Stakeholder-Supporter	Student	Positionality of person who supports charter/CMO
		Black community	Positionality of person who supports charter/CMO
		Partnering Organization	Positionality of person who supports charter/CMO
		Funder/Donor	Positionality of person who supports charter/CMO
		Policymaker	Positionality of person who supports charter/CMO
		Teacher/Staff	Positionality of person who supports charter/CMO

Charter-CMO Support <i>(Rationales provided by supporters of the CMO or descriptions for why stakeholders support them)</i>	Support Rationale	Parent	Positionality of individual who supports or opposed charter/CM
		Autonomy & Flexibility	Rationales based on the fact that organization or school provides increased autonomy and flexibility
		Staff Dedication & Commitment	Rationales based on the fact that organizational staff shows high levels of commitment, dedication, and effort to support org mission & students
		Value & Practice Alignment	Rationales based on value, demographic, or practice alignment between the speaker and the organization/school
		Quality of Education	Rationales based on the quality of education and/or academic rigor within the school/org
		Collaboration	Rationales alluding to the collaborative culture or structures of the school or organization (<i>can be within school/org or CBOs & district</i>)
		Relationships & Culture	Rationales that refer to the cultural and relational characteristics of the organization (<i>e.g., collaborative, like-minded, relationships with students/staff</i>)
		Preparation for future	Rationales focus on improving future preparedness
Diversity	Rationale provided focuses on the diversity of the student or staff population		
Charter-CMO Critiques <i>(Rationales provided by supporters of the CMO or descriptions for why stakeholders oppose them)</i>	Stakeholder-Opponent	Student	Positionality of individual who opposed charter/CMO
		Black Community	Positionality of individual who opposed charter/CMO
		CBO	Positionality of individual who opposed charter/CMO
		Funder/Donor	Positionality of individual who opposed charter/CMO
		Policymaker	Positionality of individual who opposed charter/CMO
		Teacher/Staff/Union	Positionality of individual who opposed charter/CMO
		Parent	Positionality of individual who opposed charter/CMO
	Opposition Rationale	Employment & Resources	Reason for opposing charters has to do with employment opportunities with the district
		Community fabric	Rationale for opposition is based on allegiance to community spaces (<i>e.g., schools</i>) or wanting to maintain community cohes
		History of exclusion	Reason for opposing is based on historical exclusionary

			practices of market-based or district reformers
		Private entities	Reason for opposition includes references to the privatized nature of charters (<i>e.g., not public, privately ran</i>)

Codebook 2: Birchwood Political & Educational Landscape

Parent Code	Subcode	Code Description
Interviewee Personal History	Familial	Speaker describes his/her family and other family-related experiences
	Educational	Speaker describes his/her schooling experiences and college/graduate school attainment
	Ethno-racial	Speaker describes his/her racial or ethnic background
	Class/SES	Speaker describes his/her class upbringing (<i>can be evidenced through use of explicit descriptors, parental work experiences, neighborhood descriptions</i>)
	Professional	Speaker describes his/her work or professional experience (<i>education-related and beyond</i>)
	Social activism experiences	Speaker describes his/her working in social movements, community activism, organizing work, etc.
Birchwood Education Waves	Charter schools	Speaker makes explicit references to charter schools and/or provides a description or opinion of the reform
	Community schools	Speaker makes explicit references to community schools and/or provides a description or opinion of the reform
	State takeover	Speaker makes explicit references to the state takeover and/or provides a description or opinion of the reform
	School closure	Speaker makes explicit references to school closures in Birchwood and/or provides a description or opinion of the reform
	Small schools	Speaker makes explicit references to the small schools movement and/or provides a description or opinion of the reform
	High-stakes accountability	Speaker makes explicit references to high stakes accountability and/or provides a description or opinion of the reform (<i>in BUSD or more broadly</i>)
	Reform practicality/relevance	Speaker discusses how practical or relevant a wave of reform was (<i>in terms of bringing about instructional/organizational change, practicality to the Birchwood or community context, etc.</i>)

	Reform sustainability	Speaker discusses how or if a particular reform was sustained, abandoned, or adapted (<i>e.g., includes impediments to sustainability, changes in district priorities, personnel/leadership changes, changes in policy context, etc.</i>)
Charter-Specific Dynamics	Common enrollment	Speaker makes explicit references to the effort to establish a common enrollment system and/or provides a description or opinion of the reform
	Charter-District compact	Speaker makes explicit references to the development of this charter-district compact and/or provides a description or opinion of the reform
	CMO characterization	Speaker provides an assessment or description of the local CMO sector and/or individual CMOs
	Advocacy	Speaker describes the political efforts of the California Charter School Association (CCSA) locally or across the state
	Local vs. Outsider	Speaker refers to the presence and origin of CMOs operating schools in the area (<i>e.g., local, homegrown, outside, corporate</i>) -can overlap with CMO characterization code
	Declining enrollment	Speaker discusses issues related to charter schools and the resulting declining enrollment of the local district schools
	Facilities	Speaker discusses charter schools and their challenges with securing facilities (<i>e.g., Prop. 39, colocation, buildings</i>)
	Special education	Speaker refers to charter schools and their efforts to educate students with special needs (<i>e.g., IEPs, 504s</i>)
	Black exclusion	Speaker discusses why/how charter schools in Birchwood have not tended to serve Black students, families, and communities -also includes discussion of Latino overrepresentation in charter sector
Stakeholders	Policy entrepreneurs	Descriptions, comments, or opinions of edu-preneurs, market-reform organizations or agencies, and the education reform community more broadly
	Charter leaders	Descriptions, comments, or opinions of charter school leaders

	Board members	Descriptions, comments, or opinions of school board members or the school board as a whole
	CBOs	Descriptions, comments, or opinions of specific community organizers or community organizations
	Families	Descriptions, comments, or opinions of families, parents, and/or parent-based organizations
	Foundations	Descriptions, comments, or opinions of foundations
	District officials	Descriptions, comments, or opinions of district leaders and central office staff
	Policy makers	Descriptions, comments, or opinions of various policy makers (<i>e.g., mayor, state superintendent, city officials, etc.</i>)
	Students	Descriptions, comments, or opinions of students
	Teachers	Descriptions, comments, or opinions of teachers and teacher organizations (<i>e.g., union</i>)
Local Political Culture	Strategic action	Interviewee describes strategic action and community organizing <u>to advocate or further a cause</u> (<i>can be education related or related to broader topics</i>) -EX: organized parents/families/charter leaders to maintain results-based budgeting -can overlap with community engagement
	District micropolitics	Interviewee provides a sense of the internal dynamics of the central office and among school board members; comments may also reflect dynamics between the central office and the school board
	Funding	Speaker refers to financial opportunities and challenges that communities and schools face, including those created by state/national forces and external organizations -applies both to traditional public and charter schools
	City history	Comments describe Birchwood's history (<i>comments may also include</i>

		<i>history of broader metropolitan area)</i>
	Alliances/coalitions	Speaker describes any alliances or coalitions made to advance, support, or impede a given reform, organization, etc.
	Collaborative v. competitive	Speaker describes a particular coalition or alliance and their relational dynamics (<i>e.g., dysfunction, complacency, apathy, reconciliations, compromises</i>) -can be within coalition dynamics or across coalitions
	Safety	Speaker comments on city and school safety issues (<i>e.g., gangs, violence, etc.</i>)
	Geography	Comments on the geographic layout of Birchwood and its relationship to race, class, etc.
	Race/Class Landscape	Comments reflect a narrative of race and class in the city—both historical and current (<i>not necessarily tied to geographic region of the city</i>) -EX: growing immigrant population, gentrification, resource scarcity -Can overlap with inter/intrarace & class relations codes (those focus more explicitly on relationships; this
Relations <i>(Comments broadly describes relationships among stakeholders, communities, district officials, etc.)</i>	Intra-race	Comments on relationships <u>within</u> racial and ethnic groups
	Inter-race	Comments on relationships <u>between</u> racial and ethnic groups (<i>e.g., Black-Latino; Black-White; Latino-White</i>)
	Classed	Comments on relationships <u>between</u> class groups
	Power	Comments describe who or what groups have power or who or what groups are less powerful in engaging the district, advocating/advancing their interests
	Nonpower	Comments describe who or what groups are less powerful in advancing or voicing their interests
	Trust/Tensions	Comments on relationships note the role of trust or distrust and its effect on relationships, coalitions, etc.
	Leadership	Comments describe leaders' governance style and personality

		characteristics and their role in relationship building
	Frames	Comments describe the messages or ideas circulated in relationship dynamics -can build be positive or negative in relationship building
Engagement <i>(Broader patterns of community engagement in Birchwood and education reform waves—not CMO specific)</i>	CommEng (Community Engagement)	Comments, descriptions, and opinions of community engagement efforts <i>(by BUSD, community organizations, etc.)</i> -may overlap with strategic action but specifically focuses on efforts to engage (can be stated with objective for advocacy/social movements)
	Proactive v. reactive	Discussion of community engagement reflects efforts that are either forward-looking activities (<i>proactive</i>) or in response to others, crises, etc. (<i>reactive</i>)
	Forms	Interview describes specific types of community engagement efforts (<i>e.g., talking, information dissemination, task forces</i>)
	PubEng (Public Engagement)	Comments, descriptions, and opinions of efforts to reach broader public audiences beyond local, geographic area
	Eng-Other Stakeholders	Comments, descriptions, and opinions of efforts to reach other stakeholders including funders, etc. <i>(by BUSD, community organizations, etc.-but NOT CMOs)</i>
Ideological Stance	Democratic education system	Comments reflect the interviewee’s views on democracy in education, how democratic or undemocratic schools have been or should be, and ideas of what a democratic educational system would look like
	Political views	Comments reflect the interviewee’s general political viewpoints and ideological stances <i>(broad-based; not necessarily education-specific)</i> -EX: policing, economic policies, political party affiliation
	Public school critique	Speaker presents a critique of the traditional public school system -May overlap with discussion of particular stakeholders (<i>e.g., district</i>)

		<i>officials, board members)</i>
	Equitable education system	Comments reflect the interviewee's views on equity or inequity in education and ideas of what an equitable educational system would look like