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# #NowAreYouStartingToGetIt?: A Case Study of 'Stop Charters in KY' Advocacy Campaign

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Running Head: #NowAreYouStartingToGetIt?: A Case Study of 'Stop Charters in KY'  
Advocacy Campaign

#NowAreYouStartingToGetIt?:  
A Case Study of 'Stop Charters in Kentucky' Advocacy Campaign

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## #NowAreYouStartingToGetIt?: A Case Study of 'Stop Charters in KY' Advocacy Campaign

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## **Abstract**

The United States is experiencing a sweeping neoliberal education reform agenda. The marketization of education is the latest trend in this neoliberal education agenda, and it finally took in hold in Kentucky. Charter schools are understood as being part of the marketization of education, which comes with lower accountability standards and a siphoning of public funds away from traditional public schools. Kentucky has a history of education reform policies that have resulted in an improvement in the quality of public education. However, public education has seen a decline in the allocation of state resources over the past decade. This steady decline in funding has led to more public schools being labeled as failing. Thus charter school legislation emerged in Kentucky and succeeded in passing into law. Save Our Schools Kentucky (SOSKY) mobilized in opposition to Kentucky's charter school legislation. I worked with and studied SOSKY's 'Stop Charters in KY' advocacy campaign, and I found that SOSKY was successful in building a strong constituency base and building rapport within the legislature but failed to block the passage of charter school legislation due to the timing of the mobilization, the political timing, and the timing of the legislative action on the bill. My analysis shows that because SOSKY mobilized too late in order to set up adequate fundraising strategies, the conservatives finally had control of all bodies in the state legislature, and the bill was pushed through at the end of the session giving Kentuckians very little time to become familiar with its contents, the Stop Charters in KY campaign failed. In order to move forward, advocates must mobilize to ensure accountability and transparency in charter school implementation and work to return power to the local school boards.

## **I. Introduction**

House Bill 520 (HB 520) was signed into Kentucky state law on March 21, 2017, making it the 44<sup>th</sup> state to pass charter school legislation in the US (Barton, 2017). The main objective of HB 520 is to permit a no cap limit on charter schools, including for-profit charter schools, which are publicly funded but operate outside of the local school district's authority. This paper is centered on studying Save Our School Kentucky's (SOSKY) 'Stop Charters in KY' advocacy campaign, which intended to block the passage of charter school legislation in Kentucky in 2017. Charter schools are critiqued for the lack of improvement in student achievement, the negative impact on funding for the public education system, the failure to address race and class, and the lack of professional development for teachers. SOSKY's 'Stop Charters in KY' advocacy campaign was successful in building a strong constituency base and building rapport within the legislature but failed to block the passage of charter school legislation due to the timing of the mobilization, the political timing, and the timing of the legislative action on the bill. My analysis shows that because SOSKY mobilized too late in order to set up adequate fundraising strategies, the conservatives finally had control of all bodies in the state legislature, and the bill was pushed through at the end of the session giving Kentuckians very little time to become familiar with its contents, the 'Stop Charters in KY' campaign failed.

Charter schools are publicly funded schools that adhere to far fewer regulations and accountability standards than traditional public schools. Charter school advocates claim that regulations stand in the way of innovation (Barton, 2017). Charter schools are typically managed by educational management organizations, universities, government entities or non-profit organizations. While not all charter school legislation allows for-

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profit entities to manage charter schools, but this bill does (Harmer, 2017). After reviewing the literature thus far, there are four areas of critique leveled at charter schools: the lack of improvement in student achievement, the siphoning of public funds away from public schools, the failure to address race and class equity, and the lack of professional development for teachers. The considerable variation in student achievement among different charter schools and the similarities between successful traditional public schools and charter schools pose the question of whether we can expect consistent and sustainable improvements in student achievement in charter schools. Whether charter schools are using public funds in order to make a profit or are weakening the financial stability of school districts, charter schools are negatively impacting the amount of public funds available for public education. Charter schools in general have failed to address race and class issues, particularly those of integration and quality of education. Scholars have associated these failures with a lack of intervention to increase diverse student populations and teacher representation in accordance with their students. Despite recent interventions to enhance professional development among teachers to avoid teacher attrition, charter schools and their non-union status ensure a lack of teacher professional development.

## **II. Methodology**

In order to conduct this research, I interned for State Representative Kelly Flood's reelection campaign and volunteered for Save Our Schools Kentucky. Representative Flood and I were discussing her legislative priorities after her reelection for the then upcoming 2017 legislative session. In this discussion, she informed me that charter school legislation was likely to be on the agenda and would be a highly contentious issue. After I did some



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brief preliminary research on the issue and Kentucky's history regarding education, I felt compelled to write my Capstone about charter schools in the context of Kentucky through the lens of an advocacy campaign case study. Next I searched online for which advocacy organizations were directly involved in campaigning against charter school legislation in Kentucky through the use of social media. I found Save Our Schools Kentucky (SOSKY) on Facebook and saw that they had high levels of activity on social media and were already hosting lunch and learn events and movie screenings to educate the public about how charter school legislation would serve as a threat to the quality and existence of public education in Kentucky. I reached out to the organization through a message on Facebook and received a quick and positive response to my request to join in the fight. Most of our discussions took place over the phone or in private messaging on Facebook, as most of the advocates were located over an hour away from where I lived. By the time I got involved, most of the strategic decisions had been made and my role was more focused on implementation, especially because I lived so close to the Kentucky State Capitol. I was involved in lobbying legislators, helping out with events at the Capitol, and attending meetings with other interested groups about how they could get involved with our advocacy efforts. My sources of data are journal articles; news articles; reports; legislation; participant observation; and interviews with state officials, advocates, parents, and teachers. I conducted two interviews with state elected officials, one interview with a state appointed official, and five interviews with advocates.

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teachers. I conducted two interviews with state elected officials, one interview with a state appointed official, and five interviews with advocates. The state elected officials I interviewed were State Representative Kelly Flood and State Representative Attica Scott. The state appointed official I interviewed was State Education Commissioner, Dr. Stephen Pruitt. All of the advocates I interviewed are members of Save Our Schools Kentucky. I conducted these interviews in person or through a phone conversation. I chose state elected official interviewees based on their connection to the legislative process. Representative Flood has been the chair of the house education budget committee in the past and Representative Scott is a current member of the house education committee. Commissioner Pruitt is considered to be an education expert and worked for the Georgia Department of Education when charter schools were approved in Georgia. I chose advocate interviewees based on their varied perspectives and on availability, as most of the advocates were juggling full time jobs, family obligations, and working on advocacy efforts in their remaining free time.

### **III. Context: Neoliberalism and History of Kentucky's Education System Inform Charter School Adoption**

Conservative activists have been promoting neoliberal reforms to the US education system for several decades. The marketization of education is the latest trend in this neoliberal education agenda, and it finally took hold in Kentucky in the form of a new law authorizing charter schools (Bunka, 2011; Davis, 2013). Charter schools come with lower levels of public accountability, and they siphon public funds away from traditional public schools (Harmer, 2017; Davis, 2013). Charter school supporters highlight their ability to innovate with the removal of regulation, a hallmark of neoliberalism (Davis, 2013; Levy,

2010). Kentucky has a history of education reform policies that have resulted in an improvement in the quality of public education (Ellis, 2011; Ladd, 1999). However, public education has seen a decline in the allocation of state resources over the past decade (Pruitt, 2016). This steady decline in funding hurt public education; allowing conservative activists to claim public schools are ineffective (*Ed Reform Playbook*, 2017). Thus charter school advocates succeeded in passing a law to allow the first charter schools in the state.

In order to understand the adoption of charter school legislation in Kentucky, I will first discuss the emergence of charter schools in the US in relation to the framing strategy of charter school supporters. Charter school supporters have framed charter schools as a solution to the limitations of public schools by using neoliberal ideology and the promotion of particular federal policies. Then I will briefly examine the positive and negative implications of charter schools in the US. Finally, I will discuss how Kentucky's history of education reform informed the rationale of the emergence of charter school legislation in Kentucky in 2017.

## A. The Emergence of Charter Schools in the US

### *1. The Neoliberal Marketization of Education*

Charter schools emerged in the US as part of the neoliberal education agenda, which has manifested itself into the marketization of education (Bunka, 2011; Blakely, 2017). By marketization of education I mean, the application of market forces onto the public education system. The neoliberal doctrine refers to restricting state intervention, increasing private involvement, and relying on market efficiency (Bunka, 2011; Blakely 2017). There are only six remaining states that have yet to adopt charter school legislation.

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Why did the marketization of education gain popularity among particular decision makers and parents?

Charter school supporters believe that state intervention in public schools creates limitations around innovation, but it is proven to also maintain accountability in student achievement, teacher certification, and budget allocations (Bunka, 2011). Because public schools receive federal, state and local funding, the state intervenes at all levels ranging from curriculum development to facility regulations (Bunka, 2011; Davis, 2013). Public schools are required to participate in state testing and teacher training programs to ensure accountability (Bunka, 2011). However, this funding also gives public schools the opportunity to provide some extra curricular activities and “offer funding opportunities for continuing education” (Bunka, 2011). The thinking that limitations in public schools are due to public funding and state intervention has fueled the debate centered on charter schools serving as a solution to these understood ‘limitations’ of public schools.

### *2. Policies that Gave Rise to the Adoption of Charter School Legislation*

Because the United States Constitution does not deem education as a fundamental right for all, charter schools have emerged in this lack of comprehensive of social rights. The 10<sup>th</sup> amendment leaves this issue up to the states and the 14<sup>th</sup> amendment ensures all people have equal protection under the law (Lurie, 2013; *The 14<sup>th</sup> Amendment*, 2017). Thus if a state establishes a public school system, according to the constitutional amendments, all children living in the jurisdiction of the state are granted free public education (*The 14<sup>th</sup> Amendment*, 2017). However, the state is not required to set up a public school system in the first place (*The 14<sup>th</sup> Amendment*, 2017). This lack of comprehensive social rights in the foundational document of United States government

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permits entities like charter schools to threaten the sustainability and quality of public education. Similarly it allows the federal government has the right to incentivize states to approve legislation that has the potential of jeopardizing public education.

Obama's Race to the Top Fund, created in 2002, was one such federal program to incentivize states to adopt charter school legislation. The US Department of Education had \$4.35 billion in discretionary spending to fuel the Race to the Top program, especially in the form of charter schools (Bunka, 2011; Johnston, 2012). The Race to the Top Fund promoted state education reform and overall better school performance through "a competitive federal grant program based on a number of criteria, including the adoption and expansion of charter schools" (Bunka, 2011; Johnston, 2012). Within this program, decision makers claimed, "that charter systems expand educational opportunities to disadvantaged students and can serve as a vehicle to move out of poverty" (Bunka, 2011). Due to the competitive nature of Race to the Top Fund grants, the adoption of charter school legislation allowed states to receive more federal funding for education. This has made it difficult for charter school opponents to block the passage of their charter adoption legislation when it requires the denial of these federal funds.

### B. What are the Problems with Charter Schools?

Charter schools exist in many different forms; some are completely publicly funded, some have religious affiliations, some are run by for-profit educational management organizations hundreds of miles off site. The varied nature of charter schools impacts scholars' and researchers' ability to conduct comparative studies. However after reviewing the literature thus far, there are four areas of critique leveled at charter schools: the lack of improvement in student achievement, the misuse of public funds, the failure to address

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race and class, and the lack of professional development for teachers. I will discuss each below.

### *1. Lack of Improvement in Student Achievement*

Charter schools claim to offer solutions to the student achievement gap, but so far the research has shown otherwise. With the exception of a few cases that have particular characteristics, overall student achievement is either the same as traditional public schools or it is negatively impacted by charter schools (Berends, 2015; Maas, 2015; Miron, 2007). One of the largest studies of charter schools found that on average there are “no significant effects on mathematics and reading achievement” (Gleason, Clark, Tuttle, Dwoyer, & Silverberg, 2010). Furthermore, when significant impacts on student achievement are found in particular charter schools, the variation is substantial across different schools (Gleason et al., 2010) posing the question regarding impacts associated with charter status or other elements. In another study looking at the impact of charter schools on student achievement in: Illinois, Indiana, Michigan, Minnesota, Ohio, and Wisconsin, “student achievement in [charter schools] is lower than it is in demographically similar public schools” (Miron, 2007, p. 1). Furthermore, Miron’s research indicates, “for some 60 percent of the school level comparisons drawn, charter schools were performing at levels lower than predicted” (2007). Maas’s research found when comparing charter schools with their public school counterparts, the successful schools in each category “look very similar” (2015). Maas suggests it would be more beneficial to bypass the charter versus public school impact studies on student achievement and simply look at successful schools in both sectors and “explore [their] characteristics and policies that enable the implementation and scalability of effective schools” (2015). The considerable variation in

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student achievement among different charter schools and the similarities between successful traditional public schools and charter schools pose the question of whether we can expect consistent and sustainable improvements in student achievement in charter schools.

Although charter schools are broadly either on par or worse for student achievement, there are stories of success, like in New York City and urban areas in Massachusetts. Longer school days and years, increased time on core content, like English, and distinct disciplinary approaches are characteristics of New York City and urban Massachusetts' charter schools with positive impacts on student achievement (Hoxby, Murarka, & Kang, 2009; Angrist et al., 2011). In one study, centered on New York City, researchers found extremely significant closures in the "Scarsdale-Harlem achievement gap" (Hoxby, Murarka, & Kang, 2009). For example, "a student who attended a charter school for all of grades kindergarten through eight would close about 86 percent of 'Scarsdale-Harlem achievement gap' in English" (Hoxby, Murarka, & Kang, 2009). Factors associated with New York City charter schools with these significant closures in the achievement gap are: "a long school year; a greater number of minutes devoted to English during each school day; a small rewards/small penalties disciplinary policy; teacher pay based somewhat on performance or duties, as opposed to a traditional pay scale based strictly on seniority and credentials; [and] a mission statement that emphasizes academic performance, as opposed to other goals" (Hoxby, Murarka, & Kang, 2009, p. viii). Additionally, urban Massachusetts' charter school students are performing better academically than their peers in traditional public schools (Angrist et al., 2011). Similar to researchers in New York City, researchers in urban areas of Massachusetts note positive contributions to the effects to be: "longer

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school days, more instructional time on core content, [and] a 'no excuses' philosophy" (Angrist et al., 2011). Conversely, none of the nonurban charter schools in Massachusetts adhere to a 'no excuses' approach (Angrist et al., 2011). Student achievement in charter schools across the US is on average the same or worse than traditional public schools (Berends, 2015; Maas, 2015; Miron, 2007). This poses the question of whether charter schools can uphold sustainable and consistent positive results in student achievement. However, successful closures in the student achievement gap are prominent in areas like New York City and urban Massachusetts. Researchers associate longer school days and years, increased time on core content, like English, and distinct disciplinary approaches with these more successful urban charter schools.

## *2. Siphoning of Public Funds Away from Public Schools*

Whether charter schools are using public funds in order to make a profit or are weakening the financial stability of school districts, charter schools are negatively impacting the use of public funds intended for public education. Charter school proponents have found a way to receive public funds and entitle themselves as public charters, but then some of these institutions operate as for-profit enterprises (Bankston, 2013). Eighty percent of charter schools in Michigan operate as for-profit schools (Bankston, 2013). This shift of public funds to private interests is mechanized by private educational management organizations (EMOs) functioning under contract to run charter schools (Bankston, 2013). These for-profit EMOs are more likely to "offer a more limited range of services [...] [and] less likely to serve high school students and students with special education needs since these students are more expensive to educate" (Roch, 2015, p. 1382). One critique leveled at this limited offering of services poses the question of public access for all in these so-



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called public charter schools, as public schools are required to serve all children in its district (*The 14<sup>th</sup> Amendment*, 2017). Critics of for-profit EMOs running charter schools argue, “outsourcing to EMOs results in already limited school resources being redirected for service fees, profits or both” (Miron, Urschel, Yat Aguilar, & Dailey, 2011). Additionally critics express concerns regarding, “transparency and the implications of public bodies relinquishing control or ownership of schools” (Miron, Urschel, Yat Aguilar, & Dailey, 2011). The transference of public funds to for-profit EMOs results in a lack of transparency and public access, particularly access for children that tend to require more resources to educate. This lack of transparency and access constitutes the critique that for-profit charter schools are taking tax dollars away from public education.

Not only do for-profit charter schools siphon public funds away from public schools, they also weaken the financial stability of public school districts. A study of the impacts of charter expansion on a district in Nashville, Tennessee found that charters: “cause the transfer of state and local per student funds without reducing operation costs, [...] increase direct and indirect costs, [...] and negatively impact deferred maintenance at leased buildings” (Baker, 2016, p. 10). Increased charter school enrollment is found to be associated with declining revenues in host districts with non-proportionate decline in costs. When more students attend charter schools and the district is left to serve less than 2,000 students or falls below the “efficient-scale threshold,” the “costs of providing comparable services rise” (Baker, 2016, p. 12). Furthermore, charter schools typically serve fewer students with special needs, leaving public school districts with more students with special needs, which require substantially more resources (Baker, 2016).

### *3. Failure to Address Race and Class*

One of the benefits charter school supporters have promised is the desegregation of schools and greater quality for under-served students in the public school system, who are disproportionately students of color. However according to the Civil Rights Project, “seventy percent of Black charter school students attend immensely segregated minority charter schools...or twice as many as the share of intensely segregated Black students in traditional public schools,” (Bankston, 2013). Scholars suggest one factor associated with segregated charter schools are the lack of regulations or programs to promote diverse student populations (Scott & Villavicencio, 2009). Scott and Villavicencio found that “being a charter alone is an insufficient mechanism for closing the racial achievement gap,” as “racially segregated, well-resourced and high-performing [charter] schools tend to be the exception rather than the rule” (Scott & Villavicencio, 2009, p. 238). Furthermore, many charters are characterized by having “white teachers and administrators over-see[ing] black and Latino students” (Bankston, 2013, p. 25). Some researchers have found that when teachers come from the same racialized group as their students, student achievement can benefit, not to mention the benefits from these teachers serving as “role models, mentors, advocates or cultural translators” (Egalite, Kisida, & Winters, 2015, p. 3). Charter schools are failing to desegregate schools; in fact some scholars have found that they increase segregation. Moreover charter schools do not provide better quality education for under-served students, who are disproportionately students of color.

Additionally charter schools tend to be economically segregated. Even though charter schools are more likely to be located in low socioeconomic status neighborhoods, this does

not increase any likelihood for an impoverished student to attend a charter school. Schools tend to either have a very high or very low participation in free lunch programs, which indicates economic segregation (Bunka, 2011). Even though charter schools have resulted in greater choice, “accessibility and economic segregation remain an issue” (Bunka, 2011, p. 294). Charter schools in general have failed to address race and class issues, particularly those of integration and quality of education. Scholars have associated these failures with a lack of intervention to increase diverse student populations and teacher representation in accordance with their students.

#### *4. Lack of Professional Development for Teachers*

Another element charter schools supporters offer is enhanced teacher professional development by way of fewer ‘restrictions.’ However, fewer restrictions are a euphemism for non-union schools. About ninety percent of charter schools are non-union, which results in extremely high teacher attrition rates (Bankston, 2013; Miron 2007). Non-union schools are associated with high teacher attrition rates because “workload and pay are often less variable among schools with union involvement” (Roch, 2015, p. 1383). Additionally charter schools tend to hire teachers from organizations like Teach for America, however these teachers are “recent college graduates with five weeks of teacher training. Their inexperience makes them cheap labor” (Bankston, 2013, p. 21). This hiring method threatens to de-professionalize the teaching industry. Some scholars argue that the best way to improve schools is to provide incentives for teachers to participate as mentors, in peer reviews and decision-making processes, thus creating a path of professional development (Smith, 2015). Teachers in charter schools run by management organizations have seen a decrease in autonomy compared to other types of charter

#NowAreYouStartingToGetIt?: A Case Study of 'Stop Charters in KY' Advocacy Campaign schools (Roch, 2015). However, researchers have found that charter schools are just recently starting to respond to low teacher attrition rates with professional development opportunities (Roch, 2015). Despite recent interventions to enhance professional development to avoid teacher attrition, because charter schools are anti-union, they typically do not provide teachers with professional development.

There are four domains of criticism regarding charter schools: the lack of improvement in student achievement, the siphoning of public funds away from public education, the failure to address race and class equity, and the lack of professional development for teachers. The greatly varied student achievement among different charter schools and the findings on the similarities between successful traditional public schools and charter schools pose the question of whether we can expect consistent and sustainable improvements in student achievement in charter schools. Charter schools are negatively impacting the amount of public funds available for public education by using public funds to profit and weakening the financial stability of school districts. They undermine the social and financial viability of the public education system (Massey, 1994). This decreases access to public education. Charter schools in general have failed to address race and class issues, particularly those of integration and quality of education. These failures are associated with a lack of intervention to increase diverse student populations and prioritizing that teachers come from the same racialized group as their students. Charter schools are anti-union, which ensures a lack of teacher professional development.

### C. Kentucky's Education System: National Rankings, Teachers' Rights, and Standards

Kentucky's education system ranked nearly last in the nation in a number of areas for years and it was unfair in its prioritization of accountability standards over teachers'

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rights (*A Citizen's Guide to Kentucky Education*, 2016; Ellis, 2011; Hunter, 1999; *Kentucky Teachers Strike Expanding*, 1970; White, 1998). Kentucky's education system was characterized by ranking nearly last in the nation in areas like adult literacy, the percentage of adults with a high school diploma, per pupil expenditure and pupil-teacher ratio (*A Citizen's Guide to Kentucky Education*, 2016; Ellis, 2011; Hunter, 1999). In fact, Kentucky's only top ranking was regarding sending the most illiterate members to the draft in World War II (Ladd, 1999). Kentucky's bottom ranking status bothered different interests particularly those concerned about workforce education (Ellis, 2011; Hunter, 1999; Walters, 2009). This dissatisfaction gave rise to a lawsuit, which resulted in a court ruling the entire education system as unconstitutional. Subsequently, the legislature enacted significant education reform that has been highly regarded by education experts (Ellis, 2011; Superville, 2017; Ladd, 1999; Hunter, 1999). Given that it has moved from "the bottom of the barrel to the middle of the pack," charter schools could pose a serious threat to public education (Representative Flood Interview, 2017). Charter schools are associated with the weakening of teachers' unions and education standards (McDermott, 2017; Davis, 2013). However, Kentucky's teachers' unions already have little influence and decisions around education standards are shifting towards the local school boards, as opposed to the state. The conservative legislature is creating an environment where charters can thrive at the expense of an already weakened public education system.

Not only was the system failing to enhance the education of its students, according to national rankings, but the system was also failing to protect teachers' rights, particularly black teachers' rights. Teaching in Kentucky has not been treated as a highly respected profession in terms of salary and union strength. Teacher organizations and unions, like

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schools, were racially segregated in Kentucky. During times of federal integration efforts, Kentucky struggled to keep up, but by 1965, 95.2% of all school districts had integrated (Ellis, 2011). Although this percentage could be interpreted as an indication of successful integration efforts, integration occurred through the closure of black schools, not white schools. Furthermore even though there were no more all black schools, all white schools still remained (Ellis, 2011). However, the state had not addressed how black teachers would fit into the integration plan. Thus black teachers were assigned to lower level positions and were paid less than their white counterparts even though “statewide, black teachers had, on average, higher levels of training” than white teachers (Ellis, 2011). Even black teachers with tenure had to appear in court to sustain their positions and tenure status (Ellis, 2011).

Black teachers lost even more control when black teacher associations like Kentucky Teachers Association merged into the majority white Kentucky Education Association (KEA), yet teachers were still not able to gain collective bargaining rights even after organizing a large statewide strike (Ellis, 2011). KEA had been known for being led by administrators and the “old boys” in Frankfort (Ellis, 2011). After teachers were organizing into other political action groups, the Louisville Federation of Teachers, an affiliate of the AFL-CIO, challenged KEA to address its elitist nature. After some changes, teachers chose to make KEA their collective voice representation (Ellis, 2011). Thus KEA added a UniServ Program with eleven district offices across the state to serve teachers (Ellis, 2011). For one day in February of 1970, about 25,000 of Kentucky’s 32,000 teachers went on strike, which closed about 118 of the 193 school districts (*Kentucky Teachers Strike Expanding*, 1970). After lawsuits ended the teacher strike and the education budget

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increased by only \$16 million, out of the available \$18 million, teachers were not satisfied in being fully represented and felt they were forced to take part in the strike resulting in the widespread yet temporary closure of schools (Ellis, 2011). Administrators, legislators, and the public were wary of the new influence of public school teachers (Ellis, 2011). However, Governor Collins' ideology did not follow suit with the aforementioned groups and he came out publicly in support of teachers.

Even though Governor Collins was a public supporter of teachers and progress had been occurring before her term, it was too slow and ineffective in that it did not result in statewide collective teachers' bargaining rights. However, about a decade before Collins' term, Governor Carroll's term coincided with an advancing economy, and an increase in tax revenue, yet the statewide average teacher salary only rose from 46<sup>th</sup> in the nation to 38<sup>th</sup> in the nation. Then, Governor Collins stated: "I tell audiences that whatever we do, teachers remain the key to better schools. Higher standards, tougher curriculum, more math and science—all of these are of limited value unless we also recognize that teachers make the difference," (Ellis, 2011). Even though teachers experienced some prioritization within education with the support of the governor and an increase in average teacher salary, teachers were not able to gain statewide collective bargaining rights (Ellis, 2011). As of 2010, only "23 percent of all Kentucky teachers are in districts with [collective bargaining agreements]" and Kentucky continues to lack statewide teacher bargaining rights (Sieler et al., 2010).

While teacher's collective bargaining rights, along with their salaries struggled to progress, testing and standards seemed to have more support in the legislature until recently. Thus these new standards and forms of testing typically require increased

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training and work for teachers, yet they were not seeing a proportionate rise in pay or rights. The School Improvement Act of 1978 initiated the first statewide testing in an effort to move towards “academic excellence,” (Ellis, 2011). The State Department of Education “increased the number of high school credits needed for graduation from 18 to 20,” and in 1979 all five year olds were to have access to kindergarten programs across the state (Ellis, 2011). Then in 1990, Kentucky Instructional Results Information System (KIRIS) was put into place as the state’s assessment system to ensure recently adopted standards of accountability were being met and measured (White, 1998). According to Fair Test, the National Center for Fair and Open Testing, KIRIS was one of the best in the nation (*Kentucky’s Assessment Program*, 1997). Fair Test acclaimed KIRIS for its “use of constructed-response and limited use of multiple choice, [...] not making high-stakes decisions about individuals based on test scores, [...] and providing extensive professional development and public information,” (*Kentucky’s Assessment Program*, 1997). However Fair Test did note that it created a high-stakes approach for schools (*Kentucky’s Assessment Program*, 1997). Then in 1998, the Commonwealth Accountability Testing System (CATS) was initiated and KIRIS was effectively terminated (*A Citizen’s Guide to Kentucky Education*, 2016). Unfortunately, CATS featured a restricted writing section and required that the results will be used in high stakes decisions about individual students; Fair Test had regarded KIRIS for *not* including these processes (*Kentucky’s Assessment Program*, 1997; White, 1998). In the most recent legislative session of 2017, the legislature voted to essentially end CATS, reevaluate testing and standards, and will leave most of these decisions up to local school boards (Watkins, 2017a). Before the 2017 legislative session, Kentucky was on a track of strengthening statewide standards. However, possibly due to



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the new conservative majority in the house, the senate and the governor's office, Kentucky is experiencing a weakening of statewide standards and is redirecting these decisions to the local school boards (Watkins, 2017a).

### D. Kentucky's Education Reform

#### *1. The Prichard Committee*

Education reform in Kentucky's recent history resulted from the Prichard Committee's work to generate public support for reform, the business community's concerns for an educated workforce, and a court challenge and its subsequent ruling (Ladd, 1999; Walters, 2009). The advocated reform called for: "teacher education and certification, programs for young children, such as prenatal care and Head Start classes, further reductions in public school class sizes, and increased funding for schools and universities," (Jester, 1985). The Prichard Committee for Academic Excellence has been noted as largely responsible for the public support of education reform and its necessary increased taxes to support these reforms (Superville, 2017; Ladd, 1999; Walters, 2009; Ellis, 2011). Since its inception in 1983, the Prichard Committee formed as a non-partisan and non-profit advocacy group and think tank for issues concerning public education. The Prichard Committee was made up of "former governors, business leaders, education experts, and ordinary citizens" (Day, 2013). The Prichard Committee focused on a campaign to propagate the idea that education reform would aid in bringing economic development to the state (Ladd, 1999; Walters, 2009; Day, 2013). The campaign consisted of the distribution of materials and reports and the organization of televised town halls focused on education reform and tax increases in order to fund said reform (Ladd, 1999; Walters, 2009; Ellis, 2011; Hunter, 1999). These tactics aided in giving the idea of

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education reform widespread public support (Ladd, 1999; Walters, 2009; Ellis, 2011). Not only did the idea have public support, there was no prominent group that was highly opposed to the idea of education reform. The business community publicly supported it and its related tax increases because they were concerned about an uneducated workforce (Walters, 2009; Hunter, 1999).

### *2. Need for an Educated Workforce*

As previously mentioned, Kentucky was first in the rankings for sending rejected draft members to war during World War II due to illiteracy (Ladd, 1999). Thus since WWII, Kentucky leaders and the business community were worried the state was being left out of its share of economic growth due to its largely uneducated workforce (Ladd, 1999; Walters, 2009; Hunter, 1999). With Kentucky's main fields of work being coal mining and agriculture at the time, the dominant perspective deemed that the workforce did not require high levels of education. After Governor Collins and others were able to land a deal to bring a Toyota plant to Kentucky in 1986, some thought there was a pressing need for an educated workforce came with it (Ladd, 1999).

### *3. Rose v. Council for Better Education and Kentucky Education Reform Act*

The Prichard Committee's work and the business community's support for education reform paved the way for one-third of Kentucky's school districts to pressure the state to address its problems in public education. Movement towards Kentucky's education reform began in the courts with a lawsuit brought by 66 school districts accusing the legislature of not abiding by the state's constitutional requirement to provide an adequate education to all students in Kentucky (Day, 2013). In 1989, the Kentucky Supreme Court

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ruled in *Rose v. Council for Better Education* that the state's education system was unconstitutional and ordered the legislature to 're-create and re-establish' it based on the Kentucky Constitution which mandates: "an efficient system of common schools throughout the State," (Superville, 2017; Ladd, 1999; Hunter, 1999). In *Rose v. Council*, one-third of the state's school districts sued the state, which showed overwhelming dissatisfaction with the status quo (Ladd, 1999). This was the first time ever that a state supreme court ruled its entire education system as unconstitutional (Ladd, 1999). The Kentucky Supreme Court gave the legislature one year to design a new constitutional education system "in terms of programs available to students and student achievement results as opposed to per-pupil expenditures" (Ladd, 1999). The *Rose* decision defined an 'efficient' system as:

one that was established and maintained by the General Assembly to be substantially uniform throughout the state, was free to all Kentucky children, and provided equal educational opportunity regardless of place of residence or economic conditions. An efficient system must also be sufficiently funded and free of waste, duplication, mismanagement, and political influence. (Day, 2013)

This forced the legislature to work together and create the Kentucky Education Reform Act (KERA) in compliance with the seven goals for education and nine minimum standards that the court required (Ladd, 1999).

The Kentucky Education Reform Act (KERA) took "Kentucky's education system from one of the worst in the nation to the middle of the pack" (Representative Flood Interview, 2017). KERA consisted of three primary elements: finance, curriculum and governance, which were funded with an increase in sales tax (Ladd, 1999; Walters, 2009). However, KERA ensured that no district could lose money and the distribution was more equitable, meaning the poorer districts gained a lot more than the wealthier districts (Ladd,

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1999). After just four years of KERA's implementation, the state's "school finance inequities were cut almost in half" (Ladd, 1999).

KERA succeeded in becoming law because it was perceived to be helpful to poor white people, not poor black people. Because Kentucky's population is overwhelmingly white and rural with the exception of Lexington and Louisville reform was seen as equalizing access to education for white people in Appalachia rather than black people in cities (Ladd, 1999; Walters, 2009). In Alabama, where reform was seen as improving education for impoverished black people, similar efforts to introduce fairness in funding floundered (Ladd, 1999). There, racial minorities live in poorer districts thus equalizing reforms were perceived as disproportionately serving people of color more than white people (Ladd, 1999).

Since KERA's implementation, the financial equity piece is not the most disputed issue; conservatives especially have been opposed to its "standards-based reforms" in addition to the governance and curriculum components (Ladd, 1999). Thus in the legislative session of 2017, the first year republicans have held the house in about two decades, issues of governance and curriculum have been altered with bills like Senate Bill 1 that essentially repeals common core, reassess standards, and gives more power to local boards to "intervene in low performing schools and allows them to create their own teacher evaluation systems" (Watkins, 2017a). Even though KERA is proven to have shifted Kentucky from the bottom to mid-level rankings in the nation in multiple areas concerning education, the legislature voted to roll back some standards introduced in KERA or since KERA (Hunter, 1999).

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Charter schools are a part of the neoliberal marketization of education agenda that has taken hold in 44 states in the form of charter school authorization laws (Bunka, 2011; Davis, 2013). Lower accountability standards and a siphoning of public funds away from traditional public schools are some of the threats that charter schools pose to traditional public schools (Harmer, 2017; Davis, 2013). However, charter school supporters emphasize their ability to innovate due to their freedom from regulations (Davis, 2013; Levy, 2010). Kentucky's history of education reform has resulted in positive outcomes in the quality of education provided (Ellis, 2011; Ladd 1999). However, state resources allocated to public education have decreased over the past decade (Pruitt, 2016). This decline in funding has resulted in more public schools being labeled as failing (*Ed Reform Playbook*, 2017). Additionally, Kentucky has always experienced weak teachers' rights and has recently shifted from nationally recognized accountability standards to a rollback of said standards. Consequently this has created a landscape in Kentucky where charters can thrive under weak teachers unions and the rollback of statewide standards and pose a real threat to public education in Kentucky. Thus charter school legislation emerged in Kentucky and succeeded in passing into law.

### **IV. Advocates: Save Our Schools Kentucky (SOSKY)**

Save Our Schools Kentucky (SOSKY) started the "Stop Charters in KY" advocacy campaign to block the passage of charter school legislation in Kentucky in the 2017 legislative session. SOSKY organized into a mobilized group during the 2016 election session with the specific intention of stopping charter schools from entering Kentucky. Even though the group mobilized just months before the 2017 legislative session started,

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they were able to successfully map the political landscape, define their vision and mission, and engage their constituents. However, the timing of their mobilization did prevent SOSKY from securing funding and formally organizing the leadership of the organization.

Save Our Schools Kentucky (SOSKY) is the main organized group of advocates that worked to stop charter schools in Kentucky. SOSKY is a recently formed “grassroots stakeholder advocacy group that seeks to raise awareness of impending legislation that could harm [Kentucky’s] public schools,” (SOSKY, 2017). The advocates are primarily parents, teachers, and concerned citizens (Interviewee A, 2017; Interviewee B, 2017; Interviewee C, 2017). Gay Adelman, a parent, is the founder of SOSKY. Adelman’s son went to a public high school in the Jefferson County Public School District in Louisville, Kentucky. After investigating into some issues within the school, she found some of the district’s activities and decisions were not making sense (Interviewee C, 2017). Adelman began to trace the districts activities of harming her son’s public school toward the roots of the problem and found that the issues her district was experiencing were being experienced in other states around the US (Interviewee C, 2017).

Adelman’s investigation into the history of the dismantling of public schools conceptually aligns with one of Veneklausen and Miller’s “Mapping the Political Landscape” exercise (2011, p. 109). Veneklausen and Miller say the exercise’s purpose is to: “identif[y] how a political system is organized and how different forces, people, organizations, and ideas shape the political space,” (2011, p. 109). Adelman said: “the more research [she] did, the more [she] realized this is a national problem. [She] saw trends in other states and what was on the horizon for Kentucky,” (Interviewee C, 2017). Veneklausen and Miller’s exercise suggest discussing questions like: “Who has what kind of power?; Who has more

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power?; Who has less power?; How is this imbalance maintained?; How can the imbalance be changed?" (Veneklausen and Miller, 2011, p. 109). Adelman saw that other states' legislatures who had passed charter school legislation had lobbying groups, like Americans for Prosperity, registered in their states (Interviewee C, 2017). As her research predicted, Americans for Prosperity registered to lobby in Kentucky for the first time (Interviewee C, 2017). David and Charles Koch were the founders of the organization that is now Americans for Prosperity (Bennett, 2012). Thus Adelman knew she had to start SOSKY "to try and help wake other people up and align with those who were aware because [they] all felt disconnected and powerless. [They] wanted to find each other and be strategic and communicate with legislators about [they] wanted in [their] community," (Interviewee C, 2017). Adelman among other concerned parents, teachers, and stakeholders felt powerless and disconnected (Interviewee B, 2017). Veneklausen and Miller say isolation and lack of control are common responses for situations that make you feel powerless (Veneklausen and Miller, 2011). Thus Adelman responded to those who felt similarly in order to curtail feelings of isolation and lack of control by organizing and taking control of their citizen's rights by communicating with legislators about what they wanted (Interviewee C, 2011).

#### A. Mission and Vision Statements

SOSKY's mission statement is focused on policy advocacy and is clearly defined as:

We believe every child should have equitable access to a high-quality, publicly funded education. We believe publicly funded schools should be democratically controlled by and accountable to their local communities, and uphold the highest values of those communities. We believe publicly funded education must focus exclusively on our children's growth and development, not on making profits or punishing communities. (*Mission Statement, 2017*)

Additionally the organization has four main priorities listed as:

1) Encouraging legislators to restore funding of public schools to pre-recession levels, and fully fund schools and programs so that all students can be successful; 2) preventing charter schools from taking funds away from already struggling public schools; 3) seeking authentic assessments that help children achieve their potential, while reducing the dependence and unhealthy obsession with high stakes tests; 4) stopping vouchers and scholarship tax credits from taking money from our public schools while shifting resources to private and religious schools. (*Mission Statement, 2017*)

The mission statement aligns more with what Veneklausen and Miller deem to be a vision statement, which: “is how an organization would like the world to be in the future. Visions express ideals that may not be easily attainable in a given period of time,” (2011, p. 97). SOSKY’s mission includes the statement: “We believe every child should have equitable access to a high-quality, publicly funded education;” this seems to be an ideal that is not easily attainable in a short period of time, as the US has never seen equitable access to public education, let alone equitable access to high quality public education (*Mission Statement, 2017*). The four main priorities align with what Veneklausen and Miller deem to be a mission, which: “guides policy decisions about alternative actions; prioritizes activities, demands the use of resources, channels collective action in one direction; and provides meaning and motivation for hard work,” (Veneklausen and Miller, 2011, p. 97). For example, one of the main priorities refers to “preventing charter schools from taking funds away from already struggling public schools,” which gives guidance towards policy decisions regarding any charter school system that is siphoning funds that otherwise would have gone towards public schools (*Mission Statement, 2017; Veneklausen and Miller, 2011*). It is clear that this priority guided a policy decision on SOSKY’s part because HB520 calls for the money to follow the child if he/she *chooses* to go to a charter school, thus



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taking that money away from the public school (Harmer, 2017). Because the bill clearly violated the priority statement, SOSKY decided to oppose the bill and organize around the opposition. Veneklausen and Miller note that, “many organizations do not have a written vision or mission or if they do, the staff or members do not know it” (2011, p. 97). Thus this is not to say SOSKY has their statements mislabeled, as different groups will have different definitions for these elements. However, it is to say that a group that formed in response to a sense of urgency still found it a valuable use of collective time and energy to outline these elements. This is crucial because “advocacy is a never-ending series of shifting situations involving difficult choices and unexpected outcomes,” and a clear vision and mission can help guide advocates and their potentially ever-changing strategies even in the midst of political chaos (Veneklausen and Miller, 2011, p. 97-8).

The next step that Veneklausen and Miller suggest is to outline overall strategies that specifically align with the vision and mission of the organization. SOSKY has done this internally. However, because Kentucky has such a retaliatory political climate right now, SOSKY and others are finding it more effective to not share these publicly. For example, one advocate discussed that a “possibl[e] lawsuit is coming up. [SOSKY] isn’t sure if [they] are going to be involved or not yet” (Interviewee B, 2017). The possible lawsuit would challenge the constitutionality of the law (Interviewee B, 2017). SOSKY advocates seem hesitant to discuss the lawsuit to ensure remaining in the best position to take legal action, if deemed necessary. However, Todd Ziebarth, from the National Alliance for Public Charter Schools said of opponents to HB 520 “I would be stunned if they didn’t challenge it [...] I just see it as a desperate attempt by those who oppose charter schools to do anything possible to prevent them from coming to the state and serving kids” (Watkins, 2017b).

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Additionally, a democratic state senator, Ray Jones, “believes a constitutional challenge to Kentucky’s charter school law has a shot at success” and is willing to help in the lawsuit efforts (Watkins, 2017b).

### B. Timing, Funding, and Leadership

SOSKY was formed during the election season of 2016 when the advocates that Adelman had organized “got a sense” the Democrats would lose the house, resulting in Republican control of the state house, senate and governor’s office (Interviewee C, 2017). They knew they needed to prepare for the possibility of strong support for charter school legislation once the Republicans controlled the state legislature (Interviewee C, 2017). Some of the advocates have noted in retrospect that at this point “it was too little, too late by the time people started paying attention and getting involved;” another member of SOSKY said, “we [were] late to the game,” (Interviewee C, 2017; Interviewee B, 2017).

SOSKY has no source of funding, but the organization is applying for grants. Consequently all staff work on a volunteer basis. The formal organization of SOSKY did not occur until after HB520 became law. Other long-time established groups were concerned about the potential implications of HB 520, but focused on other social justice issues at risk like reproductive health and right to work laws. During the campaign to stop charter schools in Kentucky, the organization in terms of leadership and decision making was more informal and came down to who was available at what times and whose strengths were needed to organize a call to action like a Twitter storm. After HB520 became law, the organization filed for 501c4 status and formally organized the leadership. Even though creating a formally organized structure “gives the effort stability and allows for longer-term planning and division of the work to be done, it also requires sustained time, energy

#NowAreYouStartingToGetIt?: A Case Study of 'Stop Charters in KY' Advocacy Campaign and initiates a potential new set of challenges in terms of leadership and decision making” (Shultz, 2003). SOSKY feels the time and energy required to create a formal structure is worth it, as the organization, in terms of charter schools, is taking on a new role in being the ‘watchdog’ to ensure as much accountability and transparency as possible.

At the top of the leadership are the yearly elected executive officers in positions of: president, secretary, and treasurer. Next in line are the vice presidential positions, which are also yearly elected positions: vice president of research and data, vice president of legislative response, vice president of media and communications, vice president of membership, and vice president of programs and outreach. Additionally there are local chapter leaders across the state that report to the vice president of membership. In terms of decision-making, there is a board of directors that are elected every three years with succession permitted.

### C. Constituents

Veneklausen and Miller defines primary constituents as “people who have a direct stake in an advocacy solution because they are directly affected by the problem and will benefit from the strategy,” and secondary constituents are “people who care deeply about the problem although they may not experience it personally, and are willing to make their voices heard,” (2011, p. 60). The primary constituents, with the exception of students, are engaged as members and leaders. The secondary constituents are involved in the coalition as well as members. SOSKY’s primary constituents are majority parents and teachers, and the secondary constituents are mostly concerned citizens and former teachers. The chapters that exist across the state provide a space for primary and secondary constituents to get involved as members without living near the primary office in Louisville. The lack of

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student involvement is somewhat precarious as “a constituency approach transforms the role of ‘beneficiary’ to an active agent of change,” (Veneklausen and Miller, 2011, p. 61). The experiences of students “give them not only a strong motivation to get involved but also powerful stories and wisdom about potential solutions,” (Shultz, 2003, p. 99). As the most directly affected group, students should be involved but with children being minors, questions of their engagement exist around to what degree and in what capacity. Shultz outlines a campaign to address violence towards girls where the teenage girls were provided a space to share their stories publicly and in front of legislators (2003). After the girls shared their stories, task forces were created and violence-prevention projects were started (Shultz, 2003). This example demonstrates a reasonable degree of involvement for a teenager in the campaign, which SOSKY could utilize.

The timing of SOSKY’s mobilization into an organization prevented the group from formalizing the leadership and securing adequate funding. However, even with the pressure of timing, SOSKY was able to map the political landscape, define their vision and mission, and engage their constituents successfully.

## **V. Policy: What is HB 520?**

### A. What is the Problem with HB 520?

The advocates of SOSKY understand the primary problem with HB520 to be that the charter school system it proposes will be a “significant threat to sustainable public education in Kentucky,” (Harmer, 2017). More specifically, SOSKY advocates’ particular concerns with HB520 are:

- the absence of the right of an authorizer to mandate goals and performance metrics;

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- no cap on the number of charter schools;
- the lack of minimum standards for the number of certified teachers in the classroom;
- lack of ability for charter school teachers to collectively bargain with public school employees;
- lack of local control of authorization and evaluation of charter schools;
- limited accountability to the district and to its proposed performance metrics;
- absence of how local, state, and federal funds and grants would be allocated to charter schools;
- permitting for-profit charter schools;
- and allowing renewal of underperforming charters (Harmer, 2017).

The lack of control of authorization is a highly contentious issue, and one that was amended right before the bill was voted on to include the mayors of Lexington and Louisville to be authorizers in addition to local school boards. The final piece of the authorization process is that of the appeals process. Harmer highlighted “the bill’s administrative appeals process gives ultimate approval for every application to the state board” (2017). The Kentucky state board of education is a group of members appointed by the governor, but the local school board and mayors are elected officials. The way the appeals process is set up essentially gives ultimate authorizing rights to the state board, which features no elected members. Thus this highlights the lack of accountability in the bill if ultimate authorizing rights are given to a group of people that the voters of Kentucky did not elect. The governor could potentially select all members to be strong supporters of charter schools, thus the authorization of numerous applications without being held accountable to the people of Kentucky.

The other piece of this contentious issue of authorization exists within the process and implications of adding the mayors of Lexington and Louisville as authorizers. Representative Scott noted that the final version of the bill did not reach house education

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committee members until the evening before it would be voted on in committee at 8am the next morning (Interviewee D, 2017). The late submission of the final bill was the first time mayors as authorizers had been included in the bill, as it had not been discussed at all, to Representative Scott's knowledge (Interviewee D, 2017). The adding of significant amendments without proportionate levels of discussion is absolutely a manifestation of a lack of transparency and accountability. Additionally, even though mayors are elected officials, they are still single individuals. Deeming a mayor as an authorizer of charter school application is giving significant power to a single individual who was not elected for their educational expertise. The lack of control over authorization of charter school applications is a mechanism within the bill to take power away from elected local school boards. This mechanism gives the power to governor appointed state board members who are not accountable to Kentucky people and to mayors who are not elected based on their educational knowledge and are single individuals with a lack of checks and balances.

### B. Education Reform Playbook

The advocates of SOSKY consider the cause of the emergence of a charter school bill in Kentucky to be a part of larger conservative "education reform playbook," (*Ed Reform Playbook*, 2017). The "education reform playbook" is understood in a linear fashion: 1) cut funding in public schools, which results in removal of programs, less experienced teachers, and increased fees; 2) label schools as failing through "inauthentic assessments;" and 3) "bring in charters to 'save the day!'" (*Ed Reform Playbook*, 2017; Interviewee C, 2017). To put it simply, the advocates believe the cause to be the desire of some to make a profit off of children's education. As one SOSKY member said: "the opportunists had already arrived and had been breaking public schools on purpose [by decreasing funding over the past

#NowAreYouStartingToGetIt?: A Case Study of 'Stop Charters in KY' Advocacy Campaign decade] to create a scenario such that charters would be a good alternative in people's mind" (Interviewee C, 2017). State representative Scott stated: "To witness this whole process showed me that outside influences [e.g. Koch Brothers and Company] have more influence than the voters across the state of Kentucky. This was really about the charter school industry making its move and putting its feet in Kentucky," (Interviewee D, 2017).

### C. What Is the Policy Solution and Where Did It Come From?

The policy solution that SOSKY was advocating for was to block the passage of HB520 and any bill that would allow charter schools into Kentucky. At first SOSKY was not staunchly opposed to charter schools in Kentucky because they were willing to collaborate with charter school supporters to pass a fair charter school bill that would not threaten the public education system (Interviewee C, 2017). However after discussions with local groups holding similar views, SOSKY realized very few groups were willing to come out publicly against charters, as they "did not want targets on their back. It is a retaliatory political climate right now," (Interviewee C, 2017). Unsicker suggests: "most often the best choice is the one that involves the least amount of confrontation or conflict to achieve the objective. [...] [E]ven if unsuccessful, a non-confrontational first attempt may win allies and increase support for subsequent efforts that scale up the level of confrontation" (Unsicker, 2003, p. 153). SOSKY's primary intention was to collaborate rather than start their efforts in confrontation. However, SOSKY saw a need for clear opposition and decided to make their mission statement definitively against charter schools to ensure the opposition could not twist their message into somehow aligning with theirs (Interviewee C, 2017). This clarity in their position resulted from the realization that no one else would take this stance

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and it was the only way to protect the public education system from a harmful charter school bill.

Although SOSKY was against blocking the passage of any charter school bill in Kentucky, Harmer states on the SOSKY page outlining their concerns with HB520: “At minimum, we believe charter school bills would have to be aligned fully with the Annenberg Recommendations for Accountability in Charter Schools,” (Harmer, 2017). The Annenberg Institute for School Reform organized a group of grassroots organizations and leaders in 2012-13 to investigate the effect of the rapid development of charter schools on parents, students, and communities (Dingerson, 2014). This working group resulted in setting seven standards they believe will combat the common problems they found with charter schools like: “uneven academic performance; practices that pushed or kept students out of charter schools; overly harsh discipline policies’ funding patterns that destabilized traditional schools; and a lack of representative governance, transparency, and adequate oversight, leading to potential conflicts of interest and instances of fraud and other problems” (Dingerson, 2014). Given the lack of transparency and openness in the current political climate in Kentucky, these standards are not realistic.

A large portion of the evidence that SOSKY used in order to create a policy position comes from reports of other states’ experiences with charter schools and the impact its had on their public school systems and the students. SOSKY started a hash tag on social media entitled “Now are you starting to get it?” (*Now Are You Starting to Get It?*, 2017). The hash tag is typically associated with a link to a news article or a link to another pro public school advocacy group page (nowareyoustartingtogetit, n.d.). The underlying values and assumptions are essentially that charter schools can exist but not at the expense of public



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schools. This entails not allowing for-profit charter schools to be publicly funded and simultaneously privately operated, as this is a mechanism to significantly decrease transparency and accountability. When privately owned companies manage public funds, taxpayers cannot hold these private companies as accountable as public entities.

### D. What Is the Opposition's Policy Solution and Where Did It Come From?

The opposition advocated for the passage of HB520 and is in support of charter school authorization in Kentucky. The underlying values and assumptions of The Bluegrass Institute, the main opposition, are that charter schools in Kentucky will give “Kentucky children [...] many of whom are disadvantaged and from lower-income homes [...] the opportunity for the kind of charter-school education that will give them a chance to participate in the American dream of prosperity and a successful life,” (Waters, 2017b). Additionally the values of the organization as a whole are to “advance freedom and prosperity by promoting free-market capitalism, smaller government, and the defense of personal liberties,” (BIPPS, 2017). Because their overall goal is to promote free-market capitalism and smaller government, these align with the goals of charter schools outlined in HB520 which allow the market to dictate our educational system with few regulations meaning less government involvement.

The sources of evidence that The Bluegrass Institute cites are achievement gaps in Kentucky, which are determined by high stakes testing (Waters, 2017a; Innes, 2017). The Bluegrass Institute argues that black students are struggling the most in Kentucky's traditional public schools and charter schools will provide a space for students of color to succeed (Innes, 2017). The Bluegrass Institute has determined that black students are struggling in Kentucky's public schools based on the National Assessment of Educational

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Progress's web tool (Innes, 2017). However, this tool has been criticized for its standard errors and its use of rank order statistics as inappropriate and not reflective of the complexities that exist within student achievement (Stoneberg, 2005).

### E. Political Targets

Shultz says the primary target in an advocacy strategy is the individual who: "will make the actual decision to implement or not implement the change you want" (2003). Representative John (Bam) Carney is the primary target, as he is the head of the house education committee. He has the power to call committee meetings and take votes from the other members and ultimately deem if a bill has passed through his committee or not. Shultz then says: "Once you know who you need to move, the next question is, what do they need to hear in order to be pushed in your direction? Representative Carney is a unique primary target because he is also the sponsor of HB 520, making him what Shultz refers to as a "hard opponent" (2003). A hard opponent is an official who "not only oppose[s] you but also are leading the charge against you" (Shultz, 2003). Shultz goes on to say: "your goal with these legislators is to isolate them and to highlight the most extreme, most unsympathetic aspects of their opinions and actions" (2003). Unfortunately, it is not advised to try and move a hard opponent, thus the most effective use of understanding how Carney fits in the strategy and political mapping is to simply understand his perception of the problem. Representative Carney's problems, as he stated in the house education committee meeting are that: "Kentucky's public schools are "a one size that does not fit all;[...] Kentucky cannot remain behind the other 43 states that have passed charter school

#NowAreYouStartingToGetIt?: A Case Study of 'Stop Charters in KY' Advocacy Campaign legislation; [...] current public schools are not serving low income students” (Personal Observation, 2017).

Similarly to Representative Carney’s target status, Governor Matt Bevin is also a hard opponent, as he was: “leading the charge against [us]” (Shultz, 2003). Governor Bevin was also a primary target, but in a different part of the political process. As governor, he has the power to veto a bill even after the house and senate approve it. Consequently, he is a primary target, but not one worth spending time on trying to influence as he testified in support of HB 520 during House Education Committee meetings. However, we can still note his understanding of the problem. Governor Bevin stated that he is “disgusted” that his pro public school opponents don’t care about students (Personal Observation, 2017). Governor Bevin points to President Trump and Education Secretary DeVos and people we should look up to as leader on this issue (Personal Observation, 2017). Governor Bevin said it is not about money or power and that is he “begging to give every child an opportunity” (Personal Observation, 2017). Governor Bevin repeatedly highlighted how our public schools are failing miserably and how charter schools are the answer (Personal Observation, 2017).

#### F. Critique of SOSKY’s Policy Position on HB 520

SOSKY’s advocated change was to block the passage of HB 520, and after a critique of their position, I believe it was the next step towards greater social justice. However, I do not think the blocking of the bill would have led to a large step towards greater social justice. If SOSKY advocated for an alternative policy solution in conjunction with working to block the passage of the bill, I would interpret this to be a more fruitful endeavor. Nevertheless, given the political context and the well-funded opposition, I do not think this

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would have been a viable option. Thus blocking the passage of HB 520 was the greatest advocacy effort to move closer towards greater social justice that was possible given the time and context. I will elaborate further in the Evaluation section, but my initial critique of SOSKY's position on HB 520 is that they were missing a potentially influential element. If SOSKY had the resources to conduct informal research on the Districts of Innovation (DOI) and similar programs in other states, we could have advocated for the strengthening of (DOI) as an alternative to HB 520.

## **VI. Politics: 'Disgust' with the Political Process**

The political process of HB 520 is as follows. The bill has to go through the house education committee first and then is voted on by the entire House of Representatives. Then the bill goes to the senate education committee and is then voted on by the entire senate. The house education committee chair was also the sponsor of the bill, Representative John Carney. Because of the Republican majority in the house, the senate and the governor's office, it was clear that once the bill passed through the house education committee, it would pass through the rest of the legislative process. Less than twenty-four hours elapsed from the point that legislators received the version of the bill to be voted on and the passage of the bill in the state house of representatives (Personal Observation, 2017).

The decision making process was not transparent and open. Although the house education committee was open to the public, the lack of transparency and openness manifested in more subtle ways. Representative Carney publicly stated on Wednesday, two days before the bill was voted on in the house, that the legislature would not hear a

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charter school bill that week. Representative Scott noted that the final version of the bill did not reach house education committee members until the evening before it would be voted on in the house education committee at 8am the next morning (Interviewee D, 2017). Representative Scott said: “I was extremely disappointed by the process [...]; it is a deceptive way to run government” (Interviewee D, 2017). Additionally Representative Scott noted she “didn’t think legislators [were] voting on behalf of their district, they were voting for some other interest” (Interviewee D, 2017). Even in the house education committee, in which Representative Scott is a member of, Scott expressed concern about mayors being added as authorizers. Representative Scott went on to say “something doesn’t smell right here” and she proceeded to vote no on the bill in committee (Personal Observation, 2017).

Governor Matt Bevin stated that he is “disgusted” that his pro public school opponents, including teachers, don’t care about students and called them “liars” (Personal Observation, 2017). Governor Bevin points to President Trump and Education Secretary DeVos and people we should look up to as leaders on this issue (Personal Observation, 2017). Governor Bevin said it is not about money or power and that is he “begging to give every child an opportunity” (Personal Observation, 2017).

Representative Mary Lou Marzian held Governor Bevin’s remarks in contempt. She expressed concern with Governor Bevin’s expression of disgust towards his opposition by stating: “political discourse is supposed to be cerebral so we shouldn’t be calling people liars,” (Personal Observation, 2017). Representative Marzian went on to say that she is disgusted with people who do not support teachers, and she called out Americans for Prosperity as being a Koch Brothers funded organization, showing that they have a

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financial interest in charter schools (Personal Observation, 2017). Furthermore Representative Marzian asked Bevin if he and his friends have a financial interest in charter schools, he denied her claim, and Marzian said she “want[ed] to see the tax returns because words are cheap,” (Personal Observation, 2017). Bevin responded saying Representative Marzian has been on a “tirade” against him all session and he will not accept it” (Personal Observation, 2017).

Not only was this exchange clearly emotionally charged, but it also reflects a lack of openness in the political process. Governor Bevin’s tactics can be understood as a form of power over: “in politics, those who control resources and decision making have power over those without” (Veneklausen and Miller, 2011). The level of power over that Governor Bevin was exemplifying was “hidden power”, which is understood as: “controlling who gets to the decision making table and what gets on the agenda. These dynamics exclude and devalue the concerns and representation of other less powerful groups [...]. In some cases, leaders are vilified” (Veneklausen and Miller, 2011). In this case, Governor Bevin devalued the concerns of advocates and representatives by lashing out against their character and vilified the leaders of the anti charter school campaign by saying they don’t care about students. If individuals are going to be personally attacked and labeled as liars or people who don’t care about students by the top elected official in the state, then it is understandable why some legislators and advocates might not feel comfortable fully expressing their concerns with a bill.

## **V. Strategy: #NowAreYouStartingToGetIt?**

Save Our Schools Kentucky's strategy (SOSKY) was not successful in blocking the passage of charter school legislation in Kentucky. The failure to provide adequate framing and coherent messaging contributed to the lack of success in keeping charter schools out of Kentucky. However raising political awareness among their growing constituency and building rapport with legislators have positioned SOSKY auspiciously to move forward with more success in their future work regarding fighting for "equitable access to a high-quality, publicly funded education" (SOSKY, 2017).

### A. Political Consciousness

Jeff Uniscker writes, "[s]trategy consists of the planning and actions the advocates use to seek to (partially) solve problems by influencing policy institutions to accept their policy change goals" (2013, p. 41). SOSKY's strategy consisted of a majority of the efforts focused on the short-term goal of blocking the bill and the utilization of social media messaging to meet this goal. SOSKY's short-term goal was to stop charter school legislation from passing in Kentucky. The long-term goal, in regards to charter schools, is to take on the role of 'watchdog' and ensure accountability and transparency in the application process, the implementation of the school, and the funding. One advocate described their interpretation of the 'watchdog' monitoring role as, "keeping an eye on when they finally open these charter schools, [which means] reporting the fraud, reporting the cherry picking of students, reporting all of these things that are inevitable and trying to protect the remaining public schools and the kids that are left there." (Interviewee B, 2017). The main objective in order to be effective monitors is to build a stronger constituency statewide and

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the advocates are “starting to delegate that out right now. It’s going to be a lot [of work] once [charter schools] are open,” (Interviewee B, 2017; Interviewee C, 2017).

Although there does not seem to be an explicit theory of change, I can infer from interviews and meetings that the basic logic of their strategy is: if SOSKY can build a stronger constituency across the state, particularly in more rural areas, then we will see a rise in political consciousness and thus provide a “basis for the sustained and informed citizen participation necessary to hold powerful interests accountable,” (Veneklausen and Miller, 2011, p. 62). SOSKY seems to have a strong belief in the fact that because the opposition is well funded and SOSKY is not, their power comes from a coherent message from the majority of stakeholders (Interviewee B, 2017; Interviewee C, 2017).

Veneklausen and Miller highlight Paolo Friere’s four stages of awareness as one way to understand how to build political consciousness (2011). Based on Veneklausen and Miller’s concept and my intimate knowledge of the SOSKY’s long-term strategy, I suggest the organization considers launching a political consciousness community building campaign (2011). By political consciousness community building campaign, I mean SOSKY should utilize its chapters across the state to spark conversations and activities that foster political consciousness, like Veneklausen and Miller’s “codes: opening discussion on difficult problems” (2011, p. 68). Veneklausen and Miller suggest presenting a code to a community group, which “can be a drawing, role play, game, skit, song or story that presents a familiar problem in a concrete way” (2011, p. 68). Then the facilitator or leader of the relative SOSKY chapter could help guide the conversation to ensure the participants discuss certain questions that Veneklausen and Miller suggest could increase political consciousness (2011). The questions that help guide conversation are: “description of



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what you see happening in [the code]; why is this happening?; does this happen in your community?; what problems does this lead to?; what are the root causes of these problems?; and what can we do about it?" (Veneklausen and Miller, 2011, p. 69). As cited in Veneklausen and Miller, Paulo Freire's approach says "as [participants] awareness deepens, these persons also begin to feel better about themselves. [...]their observations and critical reasoning lead them to positive action" (2011, p. 64). From interviews and personal observation, I can infer that SOSKY advocates believe if the public understood the roots of the issue and its implications, they would want to take action as well. The timing of the building of political consciousness, occurring after the failure to block the passage of HB 520, could prove to be prosperous, as the advocates now understand the nuances of the political context. Unsicker says: "[o]ne of the most common failings is when a group or organization identifies a problem and then simply begins educating or mobilizing the community without a clear understanding about the institutions it must influence, how they work, and who else is involved in that process" (2013, p. 38). Perhaps SOSKY's messaging tactics through social media was the alternative to organizing these political consciousness discussions, as their base was not widespread enough and the considerable pressure of running out of legislative time.

### B. Messaging: #StopChartersInKY

Veneklausen and Miller say in order to create an effective message, it is important to: 1) know your audience; 2) know your political environment and moment; 3) keep your message simple and brief; 4) use real life stories and quotes; 5) use precise powerful language and active verbs; 6) use clear facts and numbers creatively; 7) adapt the message to the medium; 8) allow your audience to reach their own conclusions; 9) encourage

#NowAreYouStartingToGetIt?: A Case Study of 'Stop Charters in KY' Advocacy Campaign audiences to take action; 10) present a possible solution" (2011, p. 232). SOSKY created multiple messages and most, if not all, of the messaging occurred on social media. As mentioned before, one of the messages took the form of a hash tag entitled "Now are you starting to get it?" (*Now Are You Starting To Get It?*, 2017). This hash tag message was linked to stories of charter school fraud or other types of charter school failures in other states. Other frequently used hash tags were: "stop charters in KY; save KY schools; and No HB520," (nowareyoustartingtogetit, n.d.). These messages generally align with the ten principles presented by Veneklausen and Miller mentioned above (2011). The messages are particularly successful in adapting to their mediums' and 'encouraging audiences to take action.' The use of hash tags was adapting to social media and the use of action words like 'stop' and 'say no' and the form of a question for 'Now are you starting to get it?' aid in encouraging audiences to take action.

However, the messages do not align with presenting a solution, particularly the 'Now are you starting to get it?' message. The links to charter school fraud and failures were posted numerous times a day for weeks on end. The audience could interpret the onslaught of failure after failure and fraud case after fraud case as debilitating. The frequency and abrasive tone of the hash tag could have been met with audience responses of 'yes, I get it, but now what?' Unfortunately within this messaging, there was not a clear solution presented to the audience except to stop the passage of the bill. Perhaps if there was an alternative solution along with the blocking of the bill, audiences could grasp the message with greater ease and willingness to take action. Unsicker highlighted: "a reasonable tone activates a community approach and can-do attitude while an argumentative tone...makes audiences less likely to be open to new information and

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solutions-based thinking” (2013, p. 200). As mentioned before, I do not think it was viable to present a policy solution while blocking the passage of the bill. Yet it was viable to use a less argumentative tone and a more reasonable tone like Unsicker suggested (2013).

The message of “Stop charters in KY” was made into buttons that advocates would wear in the Capitol and simply around town. The message text was superimposed onto a stop sign on the buttons. This stop sign image was also used in a lot of advocates profile pictures (Image 1, 2017). Veneklausen and Miller say: “a good poster will captivate, energize, provoke and educate” (2011, p. 253). The stop sign button is successful in captivating and energizing with its bright colors and easy to read text. It is not as successful in provoking or educating, as it does not provoke a specific action and it does not educate the audience as to what a charter is or what ‘SOS\_KY’ stands for.



*(Image 1 shows the image used in advocates profile pictures and on buttons)*

SOSKY utilized a ‘Twitter storm’ to educate the public and to influence target institutions. On SOSKY’s social media platforms of Facebook and Twitter, the advocates created an event to engage their constituency and take part in a ‘Twitter storm.’ A Twitter storm is when a large group of people tweet at a targeted group of individuals with consistent messaging. In this case, SOSKY created a page on their website entitled “Tweet

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Your Legislators,” (*Tweet Your Legislators*, 2017). On the page, a constituent had the choice of seven hyperlinked messages: “Hijacked HB520; Sell Outs Will Be Voted Out; Charter Schools Are Wrong For Kentucky; Bad For Rural Districts; Wrong Bill, Wrong Time; Charters Will Hurt Public Schools; Tax Payers Can’t Afford HB520” (*Tweet Your Legislators*, 2017). Not only were there seven overarching messages, but there were also ten or so version of each overarching message. These hyperlinked messages directed the constituent to one more webpage that gives a brief description of the thinking behind the message and then featured ten or so tweets already written for the constituent. The next step for the constituent was to click on the tweet that suited them best, based on who they wanted to target, and it would bring them to their personal Twitter page and have the tweet written and ready to be published.

My interpretation of the use of different messages was that there was no framing occurring to ensure relevancy to particular audiences. The Twitter storm was used to influence targets and to educate the public. Yet there was an excessive amount of messages, which could inhibit projecting a coherent and consistent message for any audience, let alone more than one at a time. However, advocacy experts do not agree with this method. Veneklausen and Miller say: “frames are the boundaries that highlight specific parts of an issue, place others in the background, and leave out some entirely. The frame influences how an audience thinks about an issue, including who is responsible for the cause and its solution” (2011, p. 235). For example, the message of ‘Wrong Bill, Wrong Time’ might make sense to a legislator who understands the 2017 legislative session was notorious for passing conservative bills on social issues like reproductive health, workers rights, and now education through means that were not transparent. The legislator might

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understand more than an ordinary Twitter user that this bill was pushed through at the last minute at the very end of the session, as if it were being rushed through. On the other hand, the message of 'Bad For Rural Districts' would clearly only be relevant to those in rural districts and not those in more urban districts.

Other than social media messaging and Twitter storms, SOSKY held a rally at the Capitol with a wide range of speakers and a post-card writing activity to provide an opportunity for concerned community members to easily write to their legislators. However the rally was not well attended, as fewer than twenty people came to the event, which decreased its efficacy.

SOSKY did not do much to engage the media. The media reached out to SOSKY leaders for statements and interviews, but we rarely would find that these would make it into published articles. Thus it seemed more effective to use social media to ensure the messaging was fairly represented.

### C. Collaborating With Legislators

In order to influence target institutions, SOSKY engaged in a substantial amount of lobbying, some collaboration and some protest. SOSKY advocates met with every member of the house education committee and almost every member of the senate education committee (Interviewee A, 2017; Interviewee C, 2017). One SOSKY leader was able to collaborate, in a sense, with their legislator, Republican Representative Julie Raque Adams. SOSKY was able to hold multiple meetings with Representative Adams, as she admitted she was not an expert on the bill or charter schools in general. Representative Adams was receptive to SOSKY's discussions and she noted that they inspired her to do more research

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on her own as well (Interviewee C, 2017). SOSKY advocates perceived Representative Adams to be a potential “fence sitter”, even though she was a Republican (Shultz, 2003, p. 168). Shultz defines a fence sitter as: “the lawmakers who could end up voting either way” (2003, p. 168). Unfortunately she ended up voting for the bill, and in retrospect I would label her as a “soft opponent” which Shultz defines as: “lawmakers who will vote against you no matter what you do, but whose vehemence you can diminish” (2003, p. 169). I see her as a soft opponent now because she is still a relatively new legislator, and new legislators in the majority party rarely vote against party lines.

One SOSKY member is Republican, possibly the only one so far, and they were able to lobby legislators from a different perspective. The republican SOSKY advocate stated:

I've been in contact with my legislators for a long time. I was advocating for better testing and accountability systems. I was involved in opt-out and other pro public education movements. I've changed my focus a little by focusing on charter schools and I emailed my legislators. I have a really good relationship with [Representative Ernie Harris] now. I engaged him on this law. He is now writing an opt-out [for state testing] law,” (Interviewee B, 2017)

Unsicker states: “the success of collaboration and often lobbying depend on success in building relationships between the advocates and decision makers” (2013, p. 42). Although the advocates' lobbying efforts were not successful in blocking the passage of HB 520, the advocates were successful in building relationships with decision makers. These relationships can help to carry out long-term goals and future policy campaigns, as it seems to already be aiding the aforementioned advocate in promoting opt-out of state testing legislation (Interviewee B, 2017).

Overall, SOSKY's strategy was ineffective in terms of blocking the passage of charter school legislation in Kentucky. However, particular elements of their strategy placed the

organization in an auspicious position for their future work. First, SOSKY was successful in building a stronger constituency base and facilitating their political consciousness through methods like Twitter storms. The fact that hundreds of Twitter users participated in the Twitter storm and engaged their “critical awareness” of the issue means political awareness was raised and action was taken upon it (Veneklausen & Miller, 2011, p. 64). However, the Twitter storm suffered in its immediate purpose, as it featured too many different messages and was not framed properly thus decreasing its impact. Second, SOSKY members were able to establish rapport with legislators. This rapport will serve in providing SOSKY with legislative allies in their transition to becoming the ‘watchdogs’ of charter schools in Kentucky. Additionally, this rapport is currently serving one member, as she is collaborating with Representative Harris to write a bill for next session on opt-out for state testing (Interviewee B, 2017). Even though the campaign was not effective in preventing charter school legislation from passing in Kentucky, particular aspects of the strategy positioned SOSKY favorably to continue fighting for “equitable access to a high-quality, publicly funded education” (SOSKY, 2017).

## **VIII. Evaluation**

As I have included my evaluation of certain elements of the campaign throughout this paper, I will use this section to highlight broad achievements and limitations. As mentioned previously, HB 520 has been signed into law and has now taken effect. In terms of SOSKY’s short-term goal to block the passage of the bill, this effort was unsuccessful. SOSKY’s late mobilization and the utilization of untargeted messaging were limitations of

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the campaign. However SOSKY was able to succeed in building a strong constituency base via social media and establish rapport with state legislators.

SOSKY's campaign was limited by mobilizing into an organization late in the 2016 election season. The timing of their mobilization prevented them from being able to establish adequate funding and from formally organizing the leadership and roles within the organization. A lack of funding and a lack of formal roles presented obstacles in getting physical bodies to rally and lobby with legislators. Unfortunately because the organizing began so late, there was little time to devote to fundraising and identifying formal roles. When the advocates were asked to name the biggest obstacles they faced in realizing their goals around this bill, one noted that: "no funding was the biggest [obstacle]. Everything [she] did, came out of [her] pocket and was done on [her] time. [She is] self-employed, so those were hours that [she] wasn't billing her client," (Interviewee C, 2017). Another advocate stated: "The charter side is fully funded. The lobbyists get paid to be in Frankfort everyday. We are a grassroots movement that doesn't get paid" (Interviewee B, 2017). Shultz says: "Fund-raising is a piece of the work that has to put on the table early. [...]. Activist campaigns use a wide assortment of methods to raise funds [...]: membership dues, events, door-to-door canvassing, direct mail and phone solicitation, major donors, foundation grants, organizational contributions, sale of publication and materials, and in-kind support" (2003, p. 107-110). As mentioned before, the advocates organized late in 2016 election season and had no time to put fundraising 'on the table early,' as Shultz suggests (2003). Unfortunately this hindered the amount of time advocates were able to spend on the campaign. Even in the face of great injustice, people still need to support their families and advocacy is time consuming. Although informal roles were established for



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some, the decision of who would execute a particular tactic came down to who was available or who was located closest to the state capitol rather than who is the strongest in communicating with legislators, for example. One advocate noted: “[SOSKY] had a number of people who brought considerable talent with them. [Now it is] just continuing to find them and put them where there strengths are and not burning out” (Interviewee C, 2017). Unsicker suggests: “small organizations, often with limited human and financial resources, must often pay significant attention to using others’ resources” (2013, p. 84). One advocate explained that: “[they] needed help and approached KEA [Kentucky Education Association], but they ignored us,” (Interviewee B, 2017). SOSKY is a small organization with limited human and financial resources, however, reaching out to other local groups in order to use their resources proved unsuccessful thus the group was left to use whatever resources they could conjure up among themselves.

Another limitation of the campaign was the lack of framing and a clear focus in the messaging. As mentioned in the strategy section, the Twitter storm had some success in activating SOSKY’s constituency and facilitating communication with their legislators. Each of the seven or so main messages had ten different variations of the message. Although some messages featured particular legislators names and Twitter handles, the message itself remained unchanged from others. The Twitter storm could have been more effective if the messages were framed for the legislators separately from messages intended for the public in Kentucky. Additionally, there were far too many options for participants to choose from, which resulted in a lack of clarity in the focus.

However there were successes in terms of the advocacy process. The advocates and I view the mobilization and increase in awareness among the public as one of the successes

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of the campaign. One advocate stated: “We are mobilizing and educating people. I remember when [the Facebook page] had 100 likes, now it is close to 1000, and that happened quickly,” (Interviewee B, 2017). Because of the limited amount of time the advocates had, their use of social media aided in communicating with constituents statewide and on their own time. It was through platforms like Facebook and Twitter that SOSKY was able to establish chapter leaders across the state in a few short months. Chapter leaders were able to engage people in their communities, particularly those whose circumstances prevented them from being able to attend rallies and lobby at the capitol. This type of engagement is key in being able to move forward as watchdogs of the charter school authorization process in the future.

Lastly, the recognition of the group among legislators is a success that will aid in leading to campaign successes in the future. As mentioned before, SOSKY is a new organization, but this has not hindered their ability to establish rapport with state legislators. One advocate said:

We were a non-partisan group – no union, no party. We are just parents and teachers that want schools fully and equitably funded. We are now a known group to people in Frankfort. We know what we are talking about, which impresses people. [Representative Adams] was asking us for information [...] The connections that we’ve made now know that we will hold [them] accountable (Interviewee B, 2017).

Watson’s “Impact analysis for social justice advocacy” says that “new channels for participation; position, credibility, and power of campaign participants strengthened; ability to articulate rights and formulate proposals to assert these rights; and increased awareness of members and other sectors of civil society and public about issues at stake” are indicators of success (as cited in Unsicker, 2013, p. 242-3). With SOSKY as a known

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group in Frankfort that is respected and viewed as a group of educated citizens exercising their rights through their ability to articulate what they want, I think the campaign meets all of these indicators of success. Even though the bill passed, and Kentucky will have charter schools in the future, the campaign heeded some successes, like building credibility and relationships that will aid in future goals around protecting and improving public education.

### **VIII. Lessons Learned**

HB 520 was passed into law and the role of SOSKY regarding charter schools has shifted into occupying the role of watchdogs. By watchdogs I mean paying extremely close attention to charter school applications and the authorization process and holding everyone involved accountable. Additionally, as watchdogs, SOSKY intends to keep the public informed on the status of the application process and eventually the establishment and maintenance of the schools themselves. SOSKY will be able to occupy the role of watchdogs effectively with the help of their strong constituency base and their communication methods via social media.

The overall use of social media was extremely effective in bringing people to the conversation and keeping them engaged throughout the arduous legislative session. This lesson from the 'Stop Charters in KY' campaign will prove to serve the organization in immense ways in bringing about the shift towards the watchdog role. For example, if charter schools are only being authorized by the state board, a group of governor-appointed members, SOSKY already has a captive audience ready to take action and spread the message that schools are not being approved by locally elected boards. One expert

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suggests to keep an engaged social media constituency, the organization needs: “an empowered community manager [...] behind the computer on a daily basis responding to comments and tweets with enough editorial freedom to develop an authentic voice and capitalize on real-time happenings in the media” (Connery, 2013). This has always been the case of SOSKY’s social media presence, perhaps indicating why the use of social media has been so effective for building a constituency for the organization. SOSKY’s posts are commenting on ‘real-time happenings in the media’ and is posting and responding daily. The constant upkeep on the social media pages to keep constituents engaged on the issue will be paramount in occupying the watchdog role.

The final lesson learned from the ‘Stop Charters in KY’ campaign regards the lack of formal organization and leadership roles during the campaign. Since the bill has passed and the 2016 legislative session is over, SOSKY has had time to formally organize. However, during the campaign roles were not clearly defined thus decisions were made based who had more time or who was more conveniently located to an event or a meeting with a legislator. Shultz suggests that groups “adopt only the level of structure they need to get the work done, and no more” (2003, p. 110). I am not suggesting that SOSKY should have established a formal board of directors and bylaws, but clearly defining roles would have been extremely helpful and more proportionate to the level of work needed. Some of the advocates were feeling burnt out and exhausted from having to execute almost every plan and possibly filling a role that was not suited to their strengths because roles were not clearly defined. The lessons learned from SOSKY’s utilization of social media will effectively serve future efforts as watchdogs of all the processes involved with charter

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school legislation. Finally, the work of SOSKY will improve immensely now that the group is formally organized and roles are clearly defined.

## **Conclusion**

Conservative activists have been promoting neoliberal reforms for the US education system for several decades. The marketization of education is the latest trend in this neoliberal education agenda, and it finally took hold in Kentucky in the form of a new law authorizing charter schools (Bunka, 2011; Davis, 2013). Charter schools come with lower levels of public accountability, and they siphon public funds away from traditional public schools (Harmer, 2017; Davis, 2013). Charter school supporters highlight their ability to innovate with the removal of regulation, a hallmark of neoliberalism (Davis, 2013; Levy, 2010). Kentucky has a history of education reform policies aimed at equity that have resulted in an improvement in the quality of public education (Ellis, 2011; Ladd, 1999). However, public education has seen a decline in the allocation of state resources over the past decade (Pruitt, 2016). This steady decline in funding hurt public education, allowing conservative activists to claim public schools are ineffective (*Ed Reform Playbook*, 2017). Thus charter school advocates succeeded in passing a law to allow the first charter schools in the state.

SOSKY's 'Stop Charters in KY' advocacy campaign was successful in building a strong constituency base and building rapport within the legislature but failed to block the passage of charter school legislation due to the timing of the mobilization, the political timing, and the timing of the legislative action on the bill. SOSKY's mobilized into an organization late in the 2016 election season, which prevented the group from formalizing

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the leadership and securing adequate funding. However, even with the pressure of timing, SOSKY was able to map the political landscape, define their vision and mission, and engage their constituents successfully. The advocates saw the primary problem with HB520 to be that the charter school system it proposes will be a “significant threat to sustainable public education in Kentucky,” (Harmer, 2017). SOSKY advocates understood HB 520 as a threat to public education because its authorization process takes power away from local boards and gives it to state appointed officials, and it permits a no cap limit on charter schools in the state, including for-profit charter schools. Then the decision making process was not particularly transparent and open. Additionally, the campaign suffered in a time when conservatives held the majority in the House of Representatives, the Senate, and the governor’s office. Furthermore SOSKY’s overall strategy was ineffective in terms of blocking the passage of charter school legislation in Kentucky. However, SOSKY members were able to establish rapport with legislators and increase the political consciousness of their constituents. Thus particular elements of their strategy placed the organization in an auspicious position for their future work. My analysis shows that because SOSKY mobilized too late in order to set up adequate fundraising strategies, the conservatives finally had control of all bodies in the state legislature, and the bill was pushed through at the end of the session giving Kentuckians very little time to become familiar with its contents, the Stop Charters in KY campaign failed this legislative session. However, the strong constituency base and rapport with the legislature will aid in SOSKY’s future work as watchdogs of the implementation of HB 520 in Kentucky.

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