



# ADVANCING EDUCATIONAL EXCELLENCE

THOMAS B. FORDHAM INSTITUTE  
2013 ANNUAL REPORT

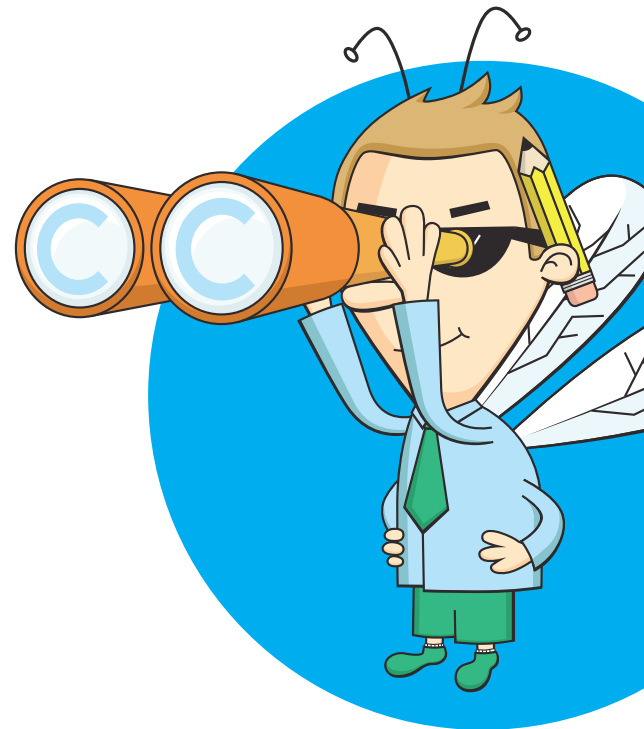
THOMAS B.  
**FORDHAM**  
INSTITUTE



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# FROM CHECKER'S AND MIKE'S DESKS

## 2013 WAS A HECKUVA YEAR FOR EDUCATION REFORMERS AND FOR FORDHAM.

Congress remained inert—and grid-locked—but in Washington there was much activity (not all of it positive) flowing from the executive branch. Yet the main national action was only marginally related to the federal government: it was the lively, sometimes demented, debates surrounding the “Common Core” state standards for English and math.

We found ourselves caught up in these disputes and playing a greater “advocacy” role than ever before in Fordham’s seventeen-year history. Sure, we like it lively—but the extent to which we plunged into the Common Core brouhaha had its origin back in 2010, when our expert reviewers examined those standards and found them superior in content and rigor to the academic standards then in use in three-quarters of the states. (The remaining quarter were roughly equivalent to the Common Core.)


We concluded that around 75 percent of American kids would learn more if their states embraced the Common Core—provided, of course, that these new standards were well

implemented throughout their K–12 systems. (Several states have a sorry history of decent, even first-rate, standards that are poorly executed.)

That forty-five states swiftly “adopted” the Common Core had only a little bit to do with us—and a great deal to do with Education Secretary Arne Duncan’s decision to use federal

“Race to the Top” dollars to incentivize such adoption. Nobody, we think, anticipated how that move would embolden Common Core critics—and Obama critics—to declare that these new standards were a move by Uncle Sam to take over the schools and usurp state and local control.

As the Common Core backlash grew over the past year, we found ourselves in the role of defenders, even advocates, appearing on innumerable talk-radio shows, testifying in some ten states, and penning op-eds for sev-



**We enter the new year with a full pipeline, an ambitious agenda, and a measure of optimism that the best still lies ahead.”**

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eral dozen newspapers. It turned out that not many groups with even our modest conservative credentials were willing to defend these new standards. (Our hats are off to Jeb Bush and his team for their steadfastness.)

But that's not all we did in 2013. Fordham issued seventeen studies and reports from our national team in Washington, plus seven more from our small teams on the ground in Columbus and our hometown of Dayton, Ohio. We authorized ten charter schools in that state, too, including several of the state's very best. We pushed via many means—research, blogs, our weekly *Education Gadfly*, Twitter—for quality school choices. We extended our work on school governance and gifted education. We even probed into funding mechanisms for severely disabled students.

And we went through some significant organizational and personnel changes, starting with the official (if unsurprising) announcement that Mike will take the helm from Checker in August. (No, Checker is not disappearing. But Mike will be in charge.) We lost a couple of veteran staffers, but we also added some outstanding talent. Much the same thing happened on our terrific board, too (see page 30).

Fundraising never ends, but a number of foundations and others were good to Fordham in 2013 (see page 31). This is one of the reasons we enter the new year with a full pipeline, an ambitious agenda, and a measure of optimism that the best still lies ahead, both for primary-secondary education in the United States and for the Thomas B. Fordham Institute.



A handwritten signature in black ink that reads "Chester E. Finn, Jr." in a cursive style.

**CHESTER E. FINN, JR.**  
is president of the Thomas B. Fordham  
Institute, a role in which he has served for  
seventeen years.



A handwritten signature in black ink that reads "Mike Petrilli" in a cursive style.

**MICHAEL J. PETRILLI**  
is Fordham's executive vice president—  
and in August will become the Institute's  
second president.

# WHO WE ARE AND WHAT WE DO



## ONE QUESTION THAT WE'VE BEEN ASKED

multiple times over the seventeen years of Fordham's existence is, "Why the gadfly?" A gadfly is one who challenges the status quo by asking provocative, sometimes upsetting, but much-needed questions. He or she persistently speaks truth to power, challenges conventional wisdom, and poses queries that many would rather overlook. This is a vital role in a democracy and in democratic debate.

We take our role as the Education Gadfly seriously, arising from our conviction that the United States can and must do better for its children, particularly those most dependent on public policy if they're to gain a quality education. We believe that the education-reform movement could do better, too.

Thus, our primary role—both nationally and in our home state of Ohio—is to frame the debate, occasionally in unconventional ways, and to identify problems that are ignored or

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glossed over by the mainstream. We offer independent and thoughtful criticisms of friend and foe alike. We advocate policies and practices that we believe will advance educational excellence for young Americans. Through it all, we bring to the education-policy debates a measure of humility, a respect for data and analysis, and a willingness to change our minds—and admit when we are wrong. (We also bring an occasional dash of humor, all too rare in these circles.)

Within education, we focus on three key policy priorities: rigorous standards for students and schools; quality choices for every family and community; and strengthening the education sector's capacity to deliver a solid education effectively, efficiently, and equitably. We occasionally dip our toes into other salient issues, from preschool and childhood poverty to school leadership and special education. We also pay attention, when warranted, to federal policy.


Within these categories, we produce a steady flow of quality research projects. We aim for studies that are credible, rigorous, impactful, and—importantly—accessible to ordinary mortals. On hot-button issues (such as the current debate on the Common Core state academic standards), we provide expert testimony and lend a friendly hand to others who care more about what's good for kids than

what's palatable to adult interest groups. Our work in Ohio, authorizing charters and taking an active role in state-level policy debates, complements our research and commentary. Both of these activities give us a real-world perspective that's rare in national "think-tank" circles. Similarly, our research informs the work we do in Ohio, guiding our practice with charters and edifying our policy positions. This symbiotic relationship strengthens our efforts in both D.C. and the Buckeye State.

To disseminate our work and engage in contemporary debates, we maintain a lively presence on the web. Our weekly *Education Gadfly* e-magazine is regularly read by more than 2,500 educators, wonks, and policymakers, and our strong press and social-media presence allow us to engage with audiences far and near. Through Twitter and YouTube, our audience continues to widen. (In 2013, we gained our 20,000th Twitter follower and ex-

pect to add thousands more in 2014.) Our four blogs allow us to keep our commentary fresh, incisive, and thoughtful. Checker and Mike—as well as Kathleen Porter-Magee and Andy Smarick, our wise and energized Bernard Lee Schwartz policy fellows—use these platforms to lend their perspectives on issues ranging from Common Core implementation to which television shows pack the greatest educational punch for young learners.

So, our answer to "why the Gadfly"? It's simple: we are the Gadfly because education needs it—and we're pretty good at it. Few organizations have the independence and agility to frame issues so forthrightly, and our capacity to combine rigorous research and education-policy expertise with making real impacts for schools and students is unparalleled. We're proud to have played this role for nearly two decades, and we look forward to playing it for years to come.



**We are the Gadfly because  
education needs it—and we're  
pretty good at it."**



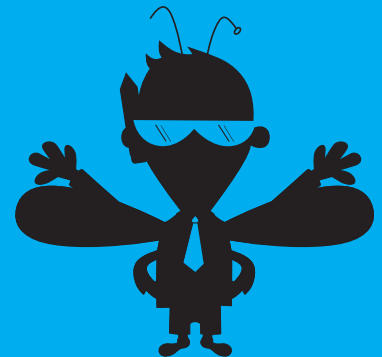
17 NATIONAL PUBLICATIONS



OHIO PUBLICATIONS

25  
LIVE  
EVENTS  
(in Washington and Ohio)

48 EDUCATION  
GADFLY EDITIONS







48 PODCASTS



28 VIDEOS



133 TALK-RADIO  
APPEARANCES



21,406 TWITTER  
FOLLOWERS

**\$250,000,000**  
in Straight A  
Fund dollars  
that we helped  
to unlock for  
Ohio's schools

**46,723 MILES**  
that Checker trav-  
eled while study-  
ing international  
approaches to  
gifted education



**2,900**

STUDENTS SERVED IN OUR 10 CHARTER SCHOOLS



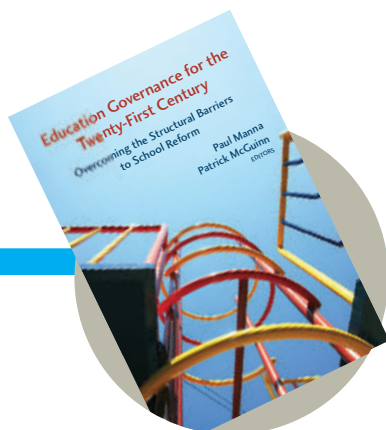
**12.11.13**  
the day our  
website hit its  
millionth view  
for the year



**1,039,413**  
page views  
for the year



# A YEAR IN THE LIFE OF FORDHAM



## JAN

We kicked off 2013 by publishing *Education Governance for the Twenty-First Century*, a major volume that examined what districts and states should do to revamp the structures and governance arrangements that frustrate so many of today's worthy reforms.

## FEB

Fordham Ohio published *Steps in the Right Direction*, which analyzed Governor John Kasich's education budget, and brought together leaders from across the state to discuss student mobility and its impact on achievement in the Buckeye State.



### FEBRUARY 6

The *National Journal* published a Q&A with Mike on socioeconomically diverse schools.

### FEBRUARY 28

Fordham Ohio's Terry Ryan testified in front of the Ohio House on Governor Kasich's budget plan.



MARCH 12

The Education Writers Association names *Flypaper* the “Best Blog” on education.



## APRIL

To mark the thirtieth anniversary of *A Nation at Risk*, which catalyzed many of today’s hottest ed-reform debates, we hosted a well-attended conversation with former education secretary Bill Bennett. We also released a documentary, cosponsored with the American Enterprise Institute, featuring reflections on *ANAR* by the likes of Lamar Alexander, Diane Ravitch, and Arne Duncan.



## MAR

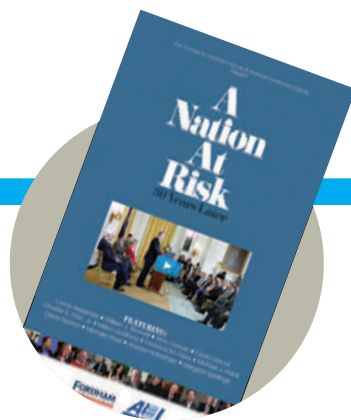
Parents and educators flocked to our *Flypaper* blog for Mike’s “10 Best Television Shows for Young Children,” which amassed more than 45,000 views and became Fordham’s post popular blog post of 2013. We also released *Governance in the Charter Sector*, a white paper stocked with advice for practitioners.

### BEST TELEVISION SHOWS FOR TWO- AND THREE-YEAR-OLDS

1. KIPPER
2. WONDER PETS!
3. BLUE’S CLUES
4. DOC MCSTUFFINS
5. CURIOUS GEORGE

### BEST TELEVISION SHOWS FOR FOUR- AND FIVE-YEAR-OLDS

1. BACKYARDIGANS
2. WILD KRATTS
3. DINOSAUR TRAIN
4. ARTHUR
5. SUPER WHY!



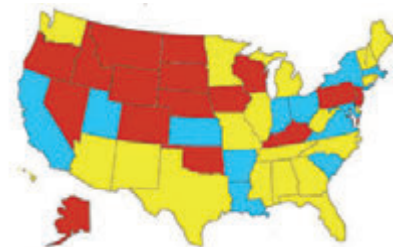
APRIL 19

Bernard Lee Schwartz Policy Fellow Kathleen Porter-Magee appeared on the Fox Business Channel to defend the Common Core.



**We need to stop having these extreme arguments between ‘No excuses!’ on one side and ‘It’s all about poverty!’ on the other. Poverty matters immensely. Schools matter immensely. Let’s get on with addressing both.”**

MICHAEL J. PETRILLI, “To Close the ‘Opportunity Gap,’ We Need to Close the Vocabulary Gap,” *Education Week*



## MAY

In May, Mike began debating Deborah Meier on *Education Week’s Bridging Differences* blog. The series was so popular that its editors extended his one-month gig and asked him to return in the autumn. Four of his posts made the blog’s 2013 “top ten” list. In Ohio, meanwhile, we surveyed district superintendents to ascertain their views on the Common Core (they’re bullish) and much else.



EDUCATION WEEK

## JUNE

Our final evaluation of the Next Generation Science Standards gave the much-anticipated standards a “C” grade, superior to sixteen states but clearly inferior to another twelve (turn to page 25 to learn why we awarded that grade).

JULY 10

Checker and Mike weighed in on the future of education and the GOP:

Add education to a long list of vexing policy issues for today's fractured Republican Party. It's not that complicated at the state level, where dozens of GOP governors have, over the years, proven their mettle by promoting higher standards, greater accountability and wider parental choice. But in Washington, Republican presidents and members of Congress have struggled mightily to find an approach that both embraces reform and respects a limited federal role.

CHESTER E. FINN, JR. AND MICHAEL J. PETRILLI, *POLITICO*



# JULY

In July, Mike floated the hypothesis that some schools, including some charter schools, would benefit from opting out of statewide accountability systems. An all-star panel of ed reformers mostly declared that his opt out was a cop out.

# AUG

In August, we published *What Parents Want*, a first-of-its-kind look at parents' education preferences. By the end of 2013, the report was covered by thirty media outlets and viewed more than 8,000 times (turn to page 26 to learn more). August was also when the students in our ten charter schools headed back to the classroom.



AUGUST 15

*The Philadelphia Daily News* editorialized on our pensions report, which profiled the city's crisis (for more info, turn to page 28).

SEPTEMBER 19

The Policy  
Innovators in  
Education Network  
(PIE Net) voted  
Mike their Most  
Valuable Player of  
2013.



# OCT

We published *A First Look at Reading Assignments*, which surveyed teachers on their adoption of Common Core reading practices. Disappointingly, we found that few teachers are making the instructional shifts expected by the Common Core. We hosted a launch event in D.C., which included teachers from five early-adopting states (for more information, turn to page 24).

OCTOBER 3

Checker and  
Mike debated the  
Common Core with  
Neal McCluskey of  
the Cato Institute  
and Emmett  
McGroarty of the  
American Principles  
Project.

# SEP

We had a busy month on the ground in Ohio, where Checker  
keynoted the state's gifted-education conference. We also  
released *Parsing Performance*, analyzing the state's new school  
report cards.



This kind of stuff may help [Bill de Blasio] win Tuesday, but it's no battle plan for conquering ignorance with strategies and weapons that the nation's biggest city can plausibly mobilize, pay for and deploy.

CHESTER E. FINN, JR., *The New York Post*, Nov. 3



## DEC

Closing out the year, we cohosted (with the Manhattan Institute) a symposium celebrating the life and work of E. D. Hirsch, Jr., founder of the Core Knowledge Foundation. A blue-ribbon group of fifty movers and shakers in education participated in frank discussions about what is needed to give students the content knowledge they need to master the Common Core—and more.

## NOV

We published a policy brief, *Financing the Education of High-Need Students*, which looks at the critical but oft-ignored problem of how to fund the education of youngsters with severe (and often costly) disabilities. And Mike testified before the Ohio House Education Committee on behalf of the Common Core—one of ten such legislative appearances by Fordham staff in 2013.

We also weighed in on the much-watched mayoral race in New York City (see above).



### DECEMBER 20

Fordham released a holiday music video, "What Does Gadfly Say?" Within a few weeks, it garnered more than 5,000 views.



ABOVE / The Fordham Institute is named for the late Dayton industrialist Thomas B. Fordham

# THE PROBLEM WE FACE:

Too many American children receive an inferior education because too many U.S. schools and school systems are dysfunctional or ineffective. This situation is most dire for our neediest students, who lack high-quality education options, who receive dumbed-down curricula and weak instruction, and whose school systems are too often held hostage by adult interest groups, including but not limited to teacher unions. Nor are affluent youngsters getting the education they require to succeed. As a result, U.S. students trail our international competitors, and many are ill prepared for college and career. Particularly galling is that these problems remain even as we spend more money per pupil than almost every other country.

In order for young Americans to succeed in college and the workforce, to participate knowledgeably in our democracy, and for

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## Fordham's History

# 1959

Thelma Fordham Pruett founds the Thomas B. Fordham Foundation in memory of her late husband, Dayton industrialist Thomas B. Fordham.

# 1997

The Foundation is relaunched following Mrs. Pruett's death, with a renewed focus on primary and secondary education in the U.S. and Ohio. Checker Finn is named president, and a proper board is created.

Also this year, Fordham publishes its first state-by-state review of standards, taking a look at English-language-arts expectations in the nation's schools.

# 2001

Fordham helps seed some of the first charter schools in Dayton.

# 2003

Fordham officially opens an office in Dayton to serve as a home base for our Ohio operations.



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our nation to maintain its leadership, prosperity, and security in the world, these problems must be solved. While the U.S. has made modest progress in some areas since being declared a “nation at risk,” we have a long way to go to create an education system worthy of our great country.

# THE FORDHAM INSTITUTE'S MISSION:

The Thomas B. Fordham Institute is the nation's leader in advancing educational excellence for every child through quality research, analysis, and commentary, as well as on-the-ground action and advocacy in Ohio.

## WE ADVANCE

- » high standards for schools, students, and educators;
- » quality education options for families;
- » a more productive, equitable, and efficient education system; and
- » a culture of innovation, entrepreneurship, and excellence.

## WE PROMOTE EDUCATION REFORM BY

- » producing rigorous policy research and incisive analysis;
- » building coalitions with policy makers, donors, organizations, and others who share our vision; and
- » advocating bold solutions and comprehensive responses to education challenges, even when opposed by powerful interests and timid establishments.

# 2004

Fordham is approved by the Ohio Department of Education to serve as a sponsor of charter schools, making us the first nonprofit in Ohio to earn this responsibility.

# 2007

The Foundation is joined by the Thomas B. Fordham Institute, a public charity that is now the face of almost all that Fordham does.

# 2010

We take a look at the final iteration of the Common Core State Standards and deem them more rigorous than the language-arts requirements in thirty-seven states and the math standards in thirty-nine states.

# 2011

In Ohio, Fordham champions legislation bringing Teach For America to Ohio's schools.

# 2014

Mike Petrilli becomes Fordham's second president.

# STANDING UP FOR STRONG STANDARDS

## Weighing In on the Common Core and the Next Generation Science Standards

The Common Core debate has turned intense, and we're smack in the middle of it. In 2013 we found ourselves in demand in statehouses, on talk radio, on editorial pages, and across the larger "war of ideas." This advocacy work has not diminished our traditional role as analyst, critic, and gadfly, but we refuse to stay mum about our belief that these promising new academic standards, if properly turned into education practice, will lead to higher achievement for students. However, we're much less bullish about the Next Generation Science Standards.

### We went long this year in analyzing and advocating for higher standards:

#### RESEARCH

Our own research both grounds our support of the Common Core, and highlights implementation challenges ahead.

#### TESTIMONY AND TOWN HALLS

During 2013, we appeared in person in fourteen states from, North Carolina to Colorado, to explain and promote the Common Core to lawmakers and community leaders.

#### PARTNERSHIPS

We work with groups like Student Achievement Partners, members of the Policy Innovators in Education (PIE) Network, and the Foundation for Excellence in Education to make the case in states and nationally.

#### OP-EDS AND BLOGGING

We publish op-eds and commentaries in state and local newspapers, and we use our *Common Core Watch* blog, edited by Kathleen Porter-Magee, to explain and defend the Common Core. This helps us cut through the chaff and speak directly to decision makers.

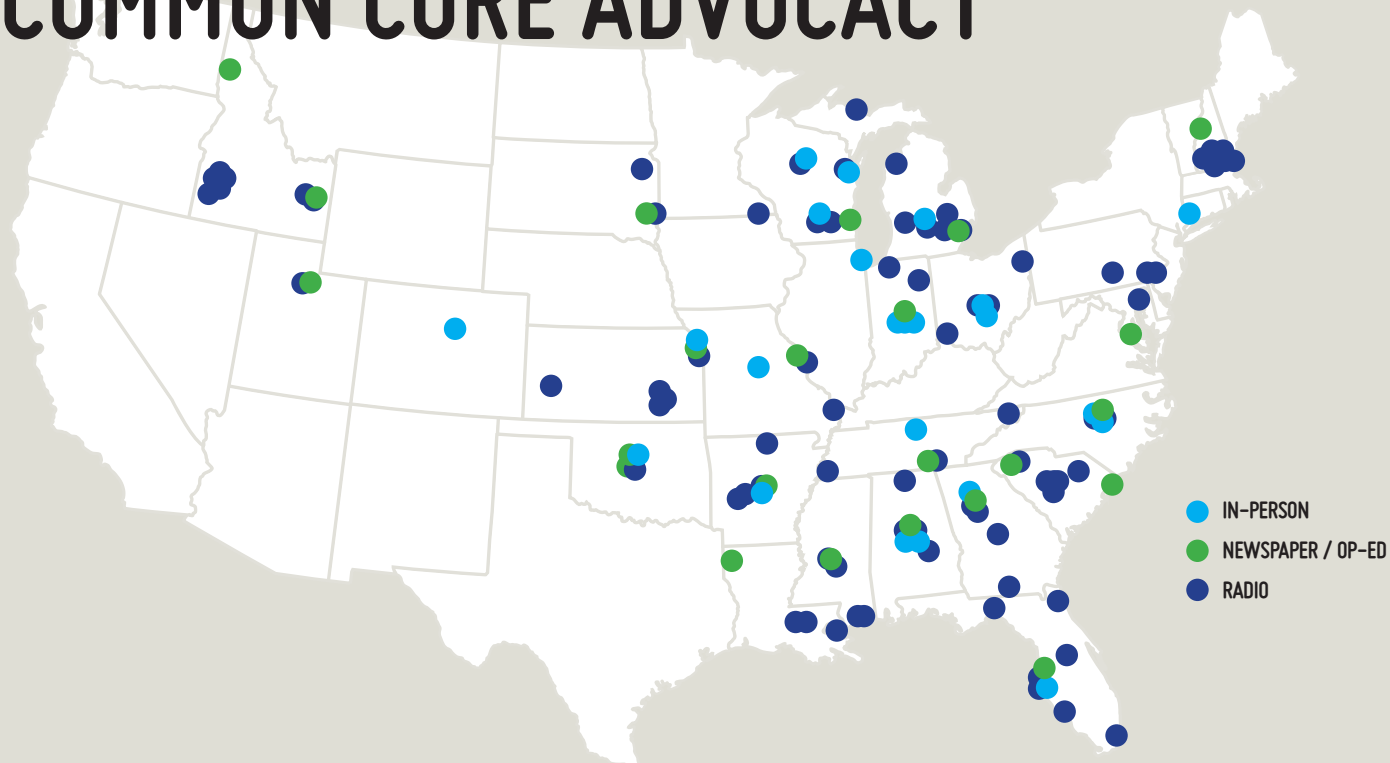
#### TALK RADIO

Radio turns out to be an important platform for discussing why the Common Core standards are a win for conservatives, as well as for kids.

As a founding partner of the PIE Network, TBFI has been a keen listener to the needs, ideas, and strategies of advocacy leaders working to reform education at the state level. It's been fun to watch how that has deepened TBFI work at the national level and as a leading voice for change in Ohio."

SUZANNE TACHENY KUBACH,  
EXECUTIVE DIRECTOR, PIE-NET

# COMMON CORE ADVOCACY



**We used the blogosphere to help wage our “War of Ideas” this year. On *Common Core Watch*, Kathleen Porter-Magee and a rotating cast of bloggers responded to critics’ assertions on the Common Core, while analyzing and monitoring Common Core implementation.**

**“Why Conservatives Should Support the Common Core”**

Kathleen Porter-Magee and Sol Stern  
April 3, 2013

The Common Core is not “ObamaCore,” as some suggest. While President Obama often tries to claim credit, the truth is the Common Core was well underway before he took office in January 2009. Some argue that states were coerced into adopting Common Core by the Obama administration as a requirement for applying

to its Race to the Top grant competition (and NCLB waiver program). But the guidelines for both make clear that adoption of “college and career readiness standards” doesn’t necessarily mean adoption of Common Core. At least a handful of states had K–12 content standards that were equally good, and the administration would have been hard-pressed to argue otherwise.

Education policymaking—and 90 percent of funding—remains centered at the state and local

level, even though No Child Left Behind (George W. Bush’s signature education law) linked federal Title I dollars directly to state education policy. What’s more, states that failed to comply with NCLB risked losing millions in compensatory education funding. Whatever “strings” have been attached to the adoption of college and career readiness standards by the Obama administration are far less consequential. And none were explicitly tied to the CCSS.

# CHARTER-SCHOOL SPONSORSHIP IN OHIO

As a leader in charter authorizing, Fordham takes a hands-on role in Ohio education.

One way that Fordham “walks the walk” in education is through active sponsorship of charter schools in Ohio. Over the past nine years, we’ve authorized schools across the state. The ten schools in our current portfolio serve more than 2,900 youngsters and include some of Ohio’s strongest schools, such as the Columbus Collegiate Academy and KIPP: Journey Columbus. More are on the way.

**When we partner with operators, we pledge the following:**

## **AUTONOMY FOR SCHOOLS**

We know sponsorship, and educators know education. Our job is to support schools’ success. We intentionally leave curriculum, instruction, and other day-to-day decisions to school leaders and staff.

## **INTEGRITY**

Unlike some Ohio authorizers, we decline to sell services to the schools we sponsor. Such practices create an inherent conflict of interest. Our sponsorship work is largely supported by school fees but subsidized when needed from other grants, as well as Fordham’s endowment.

## **HIGH STANDARDS**

Our new-school approval rates are low, as our application process is designed to identify applications with extremely well-developed plans. Our application is adapted from one used by the National Alliance of Charter School Authorizers (NACSA), and its use means that we approve only schools with a high likelihood of being successful and sustainable in the long term.

## **COMPREHENSIVE MONITORING**

In 2005, Fordham was the first Ohio sponsor to implement an online compliance-management system. This allows school leaders to focus on students—not needless paperwork—and allows us to use site visits to focus on the quality of educational delivery and management.

## **HONEST REPORTING**

We’re known for analyzing and making public all relevant information regarding the schools we sponsor, particularly when it comes to academic performance. Our annual sponsorship report compiles these details and provides an important analysis of how Ohio policy decisions affect students on the ground.

By following these tenets, our sponsorship team has developed nationally recognized expertise in such key areas as law, finance, governance, oversight, and evaluation. We’ve tackled the tough decisions that come when school performance falters. In the course of this work, Kathryn Mullen-Upton—our vice president for sponsorship and Dayton initiatives—and our sponsorship staff have advised state policymakers and other authorizers in Ohio and nationwide.

## SCHOOLS AUTHORIZED BY FORDHAM DURING 2013

SCHOOL	ENROLLMENT	LOCATION
Columbus Collegiate Academy – Main	225	Columbus
Columbus Collegiate Academy – West	144	Columbus
DECA Prep	334	Dayton
Dayton Leadership Academy – Dayton View Campus	424	Dayton
KIPP: Journey Academy	334	Columbus
Phoenix Community Learning Center	394	Cincinnati
Springfield Academy of Excellence	258	Springfield
Sciotoville Elementary Academy	143	Sciotoville
Sciotoville Community School	328	Sciotoville
Village Preparatory School: Woodland Hills Campus	296	Cleveland



**We depend on Fordham daily. We look to them for interpretation of laws and policies, we rely on them for in-depth analysis of the state of education locally, regionally, and nationally. We are proud to call Fordham our partner in this very important work.”**

**ANDREW BOY, FOUNDER AND EXECUTIVE DIRECTOR,  
UNITED SCHOOLS NETWORK**



LEFT / A teacher at CCA–West leads a lesson

ABOVE / A student at KIPP: Journey practices his fractions

# SHAPING POLICY IN THE BUCKEYE STATE

Ohio's leading advocate for education reform

Located just a block from the Statehouse, Fordham's Columbus team is at the center of the Buckeye State's efforts to ensure that all students receive a quality education. We work closely with state-level policymakers, including the governor's office, the legislature, the state board, and the department of education. We also team up with other reform-minded organizations. In recent years, we've weighed in on every significant education-policy issue in the state; in the process, Fordham has established itself as a leader in Ohio education reform.

**Our Ohio team has the capacity and independent credibility—unbeholden to any interest group other than children—to make a policy difference through the following means:**

## HIGH-QUALITY RESEARCH

When Ohio undertakes ed reforms—like its new A-to-F grading system for schools—Fordham is one of the first organizations to analyze, assess, and offer recommendations on these efforts. This practice has helped to make us a go-to source of valuable information across the state.

## INTERACTIONS WITH STAKEHOLDERS

Our Ohio policy shop keeps in regular contact with key policymakers as education decisions are made and priorities are set.



## LOCAL ENGAGEMENT

We're proud of our Ohio roots, and we stay connected with district and community leaders to make sure our policy work is shaped by and disseminated to those with the most real-world knowledge and leverage. We regularly host discussions in Columbus, Dayton, and Cleveland. Chad Aldis, our new vice president for Ohio policy and advocacy, meets often with superintendents and city leaders.

## OP-EDS AND MEDIA

We ensure that Fordham reports are covered in state media, and we regularly participate in editorial-board roundtables on education issues.



**FAR LEFT /** Ohio superintendents and school leaders discuss the findings of *Student Nomads*, a Fordham Ohio report.

**LEFT /** Governor John Kasich signs HB 167, which enacts the Columbus Education Plan. Fordham helped champion this legislation.

Our *Ohio Gadfly* biweekly magazine and our *Ohio Gadfly Daily* blog offer insightful analysis of the salient issues in Ohio schools, making them essential reads for the lawmakers, the governor's staff members, and other state leaders.

# TEACHER EVALUATION OVERKILL—WHAT ABOUT PHYS ED TEACHERS?

Terry Ryan, March 27, 2013

Most educators I know agree that students need physical exercise, and benefit from it. .... But, if PE teachers are to actually meet the voluminous state PE standards, and be evaluated by their schools for making sure all their students meet these standards, gym class is going to a whole lot less fun.... Sometimes good ideas can go too far, and this seems like one of those times.

To help Ohio stand strong with the Common Core, Mike went to Columbus to testify before the House Education Committee (at midnight!) in November:

## OHIO HOUSE TESTIMONY MIKE PETRILLI

Let's start with the standards Ohio had in place before the Common Core. In 2010, we reviewed the English and math standards of the fifty states, and compared them to the Common Core. .... The Common Core standards were good enough to earn an A-minus in math and a B-plus in English, significantly better than the grades of three-quarters of the states, and on par with the rest.

And Ohio? Your English and math standards both received a C from our expert reviewers. ....

Is it any wonder, then, that many young people in Ohio arrive at college unprepared to do college level work? And are then dumped into remedial education, meaning that their parents, or taxpayers, have to pay twice for a high school education? According to a recent study, Ohio taxpayers could have saved some \$126 million in 2007-08 on such remediation.

So let me ask you: Is this good enough for Ohio? I don't think so, and I don't think you think so.



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# RIGOROUS RESEARCH, RIGOROUS STANDARDS

Casting a critical eye on standards, assessments, and accountability in schools

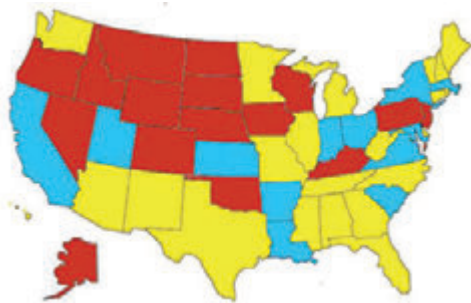
**F**Research into standards has long been one of the foundations of Fordham's work. Our research in this area provides vital information to state policymakers and educators, highlighting the strengths and weaknesses of their academic expectations. The year 2013 saw two major releases—our final evaluation of the Next Generation Science Standards and our first look at Common Core reading instruction—and the publication of several smaller studies that took a hard look at standards and related issues, from assessment to evaluation.

Fordham's role as the standards standard-bearer comes from both our top-notch research team and the company we keep. We frequently team up with leading academics, including Martin West, Patrick Wolfe, and Tim Shanahan. More than a dozen individuals ranked on Rick Hess's listing of influential edu-scholars are regular writers for Fordham. We're proud and humbled to collaborate with, and seek input from, these leaders time and again. We also work to help mold rising superstars in policy research with our Emerging Education Policy Scholars Program, cosponsored by the American Enterprise Institute, and our "Ed Reform 101" online course, cocreated with 50CAN.



ABOVE / Report author Tim Shanahan addresses the audience at the October event "Common Core Curriculum and Controversies."





**ABOVE** / States shown in blue had standards **clearly superior** to the NGSS. For states colored yellow, it was **too close to call** whether state standards or the NGSS were better. And red states had standards that were **clearly inferior** to the NGSS.

Science is hugely important to the K–12 curriculum, and we followed the evolution of the “Next Generation Science Standards” closely. The final version was released in 2013—followed swiftly by our evaluation of the standards. Unlike the “honors” marks that Fordham’s expert reviewers gave to the Common Core, however, the new standards for science earned a “C” grade. Not great, and not equal to the best state standards for this subject—but considerably better than what many states had come up with on their own.

**American science education at the K–12 level needs a radical upgrade. And in our estimation, such an upgrade begins with dramatic improvements in the expectations that drive curriculum, teaching, learning, and assessments in this crucial realm.**

—*Final Evaluation of Next Generation Science Standards*

Besides the final evaluation, we published studies that dug deeper into the science standards, *Commentary on Appendix L: Alignment of the Next Generation Science Standards With the Common Core State Standards for Mathematics and Exemplary Science Standards: How Does Your State Compare?*. Together, these analyses garnered more than seventy media hits and are being much discussed and cited as states grapple with the tough question of whether to adopt these ambitious but flawed standards.

*In Common Core in the Schools: A First Look at Reading Assignments*, we found that

- » A majority of teachers report that their lessons are dominated by skills, instead of comprehension—the inverse of what Common Core asks of the language-arts classroom;
- » The Common Core asks that all students practice comprehension with grade-level texts, yet significant numbers of elementary-school teachers still use students’ reading levels to assign texts, a practice that means not enough youngsters are engaging deeply with appropriate literature and nonfiction; and
- » Many teachers do assign informational texts (itself a source of much public debate), but the survey also indicates they’re assigning few rich exemplars of this genre.

The survey’s release was accompanied by a panel discussion with high-performing teachers about what it will take to move more classrooms towards successful Common Core practice. These all-star teachers drew much attention—the three-hour panel was viewed more than 2,000 times on YouTube.

**The children in the state are handling [Common Core] much better than the grown-ups.”**

—SUZANNE CULBRETH, ALABAMA HIGH-SCHOOL TEACHER



# QUALITY CHOICES FOR EVERY FAMILY

In 2013, Fordham's research pushed the choice conversation in new directions

Fordham has a longstanding commitment to expanding school choice. Once it became clear, however, that market forces alone weren't consistently yielding quality education, we were one of the first organizations to focus the charter school and private-school choice (a.k.a. voucher and tax-credit) movements on quality and accountability. In 2013, we added a new focus on the "demand side" of school choice, seeking to understand parental preferences in a nuanced, actionable way.

This research has found use with charter-school authorizers and "portfolio" school districts, and it was featured in a special report in *Education Week*. Our research has stayed current in this fast-changing area, and we continue to reach our audience in new and different ways.

Our path-breaking study *What Parents Want: Educational Preferences and Trade-Offs* explored what parents prioritize when choosing a school for their children. We found that most parents seek a solid grounding in math and reading, an emphasis on STEM, and the development of good study habits, critical-thinking skills, and communication skills. But once those "must-haves" are satisfied, six niches of parents express specific "nice-to-haves."



**PRAGMATISTS**  
assign high value to schools that "offer vocational classes or job-related programs."



**JEFFERSONIANS**  
prefer a school that "emphasizes instruction in citizenship, democracy, and leadership."



**TEST-SCORE HAWKS**  
look for a school that "has high test scores."



#### MULTICULTURALISTS

laud the goal, “learns how to work with people from diverse backgrounds.”



#### EXPRESSIONISTS

want a school that “emphasizes arts and music instruction.”

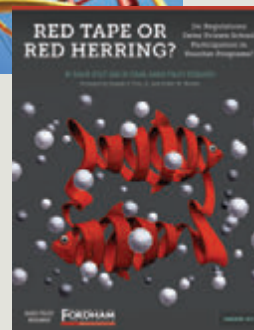
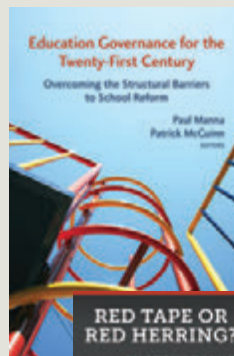


#### STRIVERS

assign importance to their children being “accepted at a top-tier college.”

» **REAL-WORLD RECOMMENDATIONS.** Drawing from conversations with two-dozen experts, our brief *Governance in the Charter Sector* imparted practical suggestions on how to improve charter governance. *School Choice Regulations: Red Tape or Red Herring?*, our report on private schools’ attitudes toward vouchers, included similarly practical recommendations. Both have been presented at multiple conferences, and both have been distributed to key voices in the choice movement.

» **SOCIAL MEDIA.** To increase the reach of *What Parents Want*, we created a quiz that parents could take to identify their school niche, as well as a video featuring various ed reformers, including District of Columbia Public Schools Chancellor Kaya Henderson, talking about the choices they have made as parents. Going beyond a traditional report rollout gives our research longevity and engages new eyes.



Fordham’s policy brief on charter school governance is an excellent resource for operators, authorizers and policymakers. It is timely and accessible and provides a comprehensive overview of an emerging hot topic in the field.”

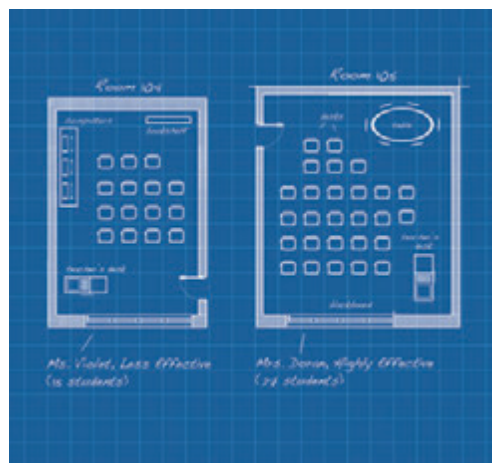
PARKER BAXTER, DIRECTOR OF KNOWLEDGE, NACSA

# BOOSTING SCHOOLS' CAPACITY

Faulty governance arrangements and antiquated funding systems impede our educational progress

It's no secret that the fundamental structures and governance arrangements of U.S. primary-secondary education often get in the way of changes that would benefit kids, nor is it a surprise that education systems struggle to spend money efficiently, even as they are forced to “do more with less.” In 2013, we tackled several facets of this problem, from the unsustainable costs of pensions to teacher assignments and class size. And we (with our partners at the Center for American Progress) have made some progress in getting governance onto the ed-reform agenda. For example, *Education Week's* annual “Quality Counts” publication issued in January 2014 makes governance its special focus.

In *Right-Sizing the Classroom: Making the Most of Great Teachers*, we tested a hypothesis: what would happen if we assigned more students to stronger teachers and fewer students to weaker ones? Using North Carolina data, we found that the net result can be improved learning for students without necessarily raising costs.



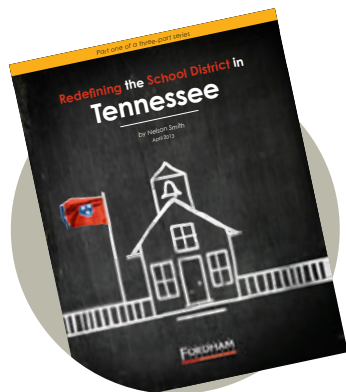
**THE BIG SQUEEZE:** Pensions and retiree health-care benefits consume a large and growing part of district (and state) budgets. In a multi-part analysis, we examined the long-term implications in three major cities, as well as the steps they (and their states) have—and have not—taken to ease this burden.

» **PHILADELPHIA** has projected massive pension payouts in the next decade; in a worst-case scenario, the district will be paying 13 percent of its budget toward retirees in 2020.

» **CLEVELAND** benefits from recent legislative changes and system modifications that, for the time being, are keeping pension costs under control, but the district's deep-set fiscal woes mean that greater change will soon be needed.

» **MILWAUKEE'S** pensions situation has been greatly improved by Wisconsin's Act 10, which removed certain retiree benefits from collective-bargaining agreements and saved 404 teachers' jobs in the city in 2013. But even that is a stopgap measure, and the district's current pay-as-you-go structure means that as enrollment shrinks and the number of retirees rises, the district's safe haven will end.

Even though it was highly technical, *The Big Squeeze* was one of our most-read 2013 releases. Significantly, outlets in cities like Albany—which will confront this confounding problem in the future—studied and reported on the findings. We're confident that it will remain impactful as more cities face issues of shrinking enrollments and ballooning retiree ranks.



**We know we need to radically change education delivery to make a difference. We reach opinion leaders and policymakers through commentary in a wide variety of outlets.**

**RETHINKING HIGH SCHOOL**  
**CHESTER E. FINN, JR., *THE NATIONAL REVIEW***  
**OCTOBER 28, 2013**

Because it's so difficult to launch a frontal attack on structures and practices as deeply ingrained as those of the American high school—where often the biggest policy debate is about starting the day later so teenagers can stay in bed longer—the most promising path to change is working around the system. New institutional forms are emerging as alternatives to James B. Conant's “comprehensive” model (which envisioned an enrollment of at least one thousand students of varying abilities, receiving instruction in a wide range of subjects distributed among several “tracks”). Specialized “early college” high schools enable motivated students to speed up, earn as much as two years' worth of college credits, and improve what would otherwise be a boring senior year. Dual-enrollment programs also allow high school students to earn university credits, and access to Advanced Placement courses is increasing. STEM (science, technology, engineering, and mathematics) schools appeal to young people with a keen interest in those fields, while career/technical schools (sometimes in league with community colleges) help others prepare for gainful employment after graduation.

**REDEFINING THE SCHOOL DISTRICT:** As traditional districts encounter difficulties turning around their lowest-performing schools, one imaginative solution is the state-run “recovery” district. The Tennessee Achievement School District is one such district, comprised of chronic low performers spread across the Volunteer State. We took a look at Tennessee's decision-making process in order to draw lessons for other states considering similar moves. It's generated strong interest from education groups and media outlets in states facing similar problems. We'll follow up in 2014 with profiles of kindred arrangements in Louisiana and Michigan.

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# FINANCES IN BRIEF

Fordham's budget for 2013 was \$5.2 million dollars and is projected to be about \$5.9 million in 2014. Of that, roughly one-third will be supported by our own endowment and the remainder raised from private donors. Our charter-sponsorship operation is largely supported by school fees. (For a host of reasons, we don't chase other government funding.)

OPERATING REVUES	2012 (ACTUAL)	2013 (ACTUAL)	2014 (PROJECTED)
Fordham Endowment	\$1.6M	\$1.1M	\$2.1M
External Funding	\$2.9M	\$4.1M	\$3.8M
Total Expenses	\$4.5M	\$5.2M	\$5.9M

## HOW QUICKLY IS FORDHAM GROWING?

Fordham continues to expand prudently, but we are also increasing our capacity to deliver thoughtful research, studies, news analysis, and policy briefs. We've added a new research and policy associate to help keep things humming on the research side and a new national policy director to increase our policy and advocacy output. These expansions bring our full-time-staff total to twenty and have been done with an eye towards the bottom line, as we know that what we spend needs to yield a strong return on investment. Today's staff, new and old, is worth every penny.

## ISN'T FORDHAM ALSO A FOUNDATION? DOES IT MAKE GRANTS?

The Thomas B. Fordham Foundation is a "Type I supporting organization," controlled by the Thomas B. Fordham Institute. These sister organizations are both tax-exempt public charities under section 501(c)3 of the tax code. Today, most of our work is conducted under the Institute name, ordinarily with partial funding from the Foundation's endowment, which—combined with the Institute's tiny endowment—reached \$58 million in late 2007, before falling to a low of \$34 million in early 2009. As of January 2014, it has partially rebounded to \$50.4 million.

Fordham does make a few grants each year, but these are targeted and small. Many go toward our on-the-ground work in Ohio, where we play an active role in the state's education landscape. Recent grantees include the Philanthropy Roundtable, Parents Advancing Choice in Education (Dayton), and several promising Ohio charter schools.

## HOW MUCH DOES FORDHAM SPEND ON MANAGEMENT AND STAFF VERSUS PROJECT COSTS?

In our audited 2012 financials, 17 percent of total spending supported management (and minor fundraising outlays) and personnel, but the bulk of the staff's time is devoted to substantive project work, conducting direct research and coordinating, editing, and disseminating the studies that we commission.

## ARE YOUR FINANCES AUDITED? ARE ADDITIONAL DETAILS AVAILABLE?

Yes. Lane & Company in Washington, D.C., audits our books, and we've had clean audits every year since commencing this process in 2003. Copies of our audited statements are available on request.

# FUNDERS

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