



Teach for America as Institutional Subversive?
New agents in the contemporary politics of American education reform

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Abbreviations

AACTE	American Association for Colleges of Teacher Education
AEI	American Enterprise Institute
AFT	American Federation of Teachers
ALEC	American Legislative Exchange Council
ANAR	A Nation at Risk
BESE	Board of Elementary and Secondary Education
CMO	Charter Management Organisation
CTU	Chicago Teachers Union
DACA	Deferred Action for Childhood Arrivals
E4E	Educators for Excellence
ESEA	Elementary and Secondary Education Act
ESSA	Every Student Succeeds Act
KIPP	Knowledge is Power Program
LEE	Leadership for Educational Equity
NAACP	National Association for the Advancement of Colored People
NCATE	National Council for Accreditation of Teacher Education
NCLB	No Child Left Behind
NCSGF	National Charter School Growth Fund
NCTQ	National Council on Teacher Quality
NEA	National Education Association
NLNS	New Leaders for New Schools
NSNO	New Schools for New Orleans
OSPB	Orleans Parish School Board
PIE	Policy Innovators in Education
PISA	Program for International Student Assessment
TF	Teach First
TFA	Teach for America
TFAll	Teach for All
TNTP	The New Teacher Project
UFT	United Federation of Teachers
US DOE	United States Department of Education

Abstract

This thesis seeks to explain how the Teach for America [TFA] organisation has precipitated consequential changes in American K-12 education. A large literature on education politics describes an inflexible system, riven with vested interests and therefore resistant to reform. Yet despite this oft-cited rigidity, consequential change *has* occurred in the last few decades and several recent studies have highlighted TFA's critical role in disrupting the traditional structures of the American public education system. In particular, TFA has fuelled the dramatic growth of alternative pathways into teaching as well as high-profile and rapidly expanding models of charter schooling. As elected and appointed officials and as leaders of prominent advocacy groups, TFA alumni have also been instrumental in the passage of choice and accountability reforms at the local, state, and federal level. To explain how TFA has acquired and exerted significant influence, I synthesise recent insights from the rational public administration and historical institutionalist literatures to develop and test, through process tracing, a model of 'institutional subversion'.

'Institutional subversion' describes a process whereby a group of programmatically-motivated agents progressively infiltrate a system and reform it from within. I argue that subversion enables concrete changes in policy systems that are resistant to top-down reform, owing to the dominance of vested interests and high degrees of agent discretion. Subversion exploits the fact that no matter how dominant they may be, system incumbents have limited information about other agents' capacities and preferences. Imperfect information means incumbent groups can be slow to recognise and mobilise against threats to the status quo posed by subversive action. In the meantime, subversive agents advance change by introducing innovations in structures and practices and capturing key decision-making posts within the system. If subversive challengers can amass sufficient power resources to resist incumbent reprisals, their legacy of change can endure.

By conceiving of TFA as an agent of institutional subversion, we enhance our understanding of how recent changes in American education have come about. Extant explanations grounded in new forms of philanthropic intervention, neoliberal ideas, and variations in interest group power are essential pieces of the puzzle. But these explanations do not in themselves offer a complete account of why we have seen significant shifts in a sector traditionally characterised as highly intransigent. By placing agents sympathetic to reform at the heart of the education system, TFA provided a partial answer to the principal-agent problem that has plagued past attempts at top-down reform by philanthropists and policymakers alike. In accounting for one of the more spectacular instances of policy entrepreneurship in recent times, this thesis makes a novel contribution to the politics of education literature. Moreover, by paying careful attention to the interplay between structure and agency in new institutionalist theory, this thesis identifies and expounds a mode of institutional change that is generalisable to contexts well beyond American public education.

1. Introduction

The evolution of the Teach for America [TFA] organisation from fledgling non-profit to education sector heavyweight is one of the more remarkable examples of social entrepreneurship in recent times. In the early 1990s, TFA emerged as an audacious but small-scale experiment in teacher recruitment out of an idea first propounded in an undergraduate thesis. Responding to chronic teacher shortages and widespread anxiety about educational standards in America, TFA placed recent graduates from prestigious colleges as teachers in struggling schools. Led by a team of inexperienced twenty-somethings, the nascent organisation operated on a shoe-string budget of philanthropic and corporate donations and nearly succumbed to bankruptcy on more than one occasion (Kopp, 2001a).

The pace and scale of TFA's ascendancy can be framed by two incidents that occurred some 14 years apart. In 1994, Linda Darling-Hammond, one of America's most prominent education academics, excoriated Teach for America in a widely-read article in *Phi Delta Kappan* – the journal of record for education sector professionals. She denounced TFA's model of teacher recruitment, training, and placement as 'brash idealism' destined to leave 'a trail of failure' and an attack on efforts to professionalise the vocation of teaching (Darling-Hammond, 1994, p. 22). The high-profile condemnation came at a time of great financial vulnerability for TFA. Wendy Kopp, TFA's founder, recalls that 'for years afterward, every article about us in the media would quote Linda Darling-Hammond' (Kopp, 2001a, p. 100).

Fast forward to December 2008, and both Darling-Hammond *and* Wendy Kopp were touted as candidates for Education Secretary in the first Obama administration (Brill,

2011; E. Green, 2008b). By this point, TFA was no longer a financially precarious start-up. The organisation was operating in 35 regions, had 4000 incoming corps members a year, annual revenue of USD275 million and 20,000 alumni, many of whom occupied influential positions in education policy (Teach for America, 2010). Darling-Hammond was considered by many to be the leading candidate for the Cabinet post. Indeed, she had served as an advisor to Obama's campaign and as the senior education figure on the president-elect's transition team. Both the American Federation of Teachers and the National Education Association, long-standing and powerful allies of the Democratic party, backed her candidacy (Brill, 2011; Dillon, 2008). But Darling-Hammond's inveterate criticism of Teach for America made her unacceptable to an increasingly influential group, called Democrats for Education Reform, (DFER), co-founded by one of TFA's original staffers, Whitney Tilson. DFER threw its weight behind the former Chicago schools chief and TFA supporter Arne Duncan. As Secretary, Duncan staffed the top ranks of the Department of Education with many TFA alumni, and his signature policy – Race to the Top – accelerated TFA's growth through direct grants and incentives for states to take up or expand TFA corps (Brill, 2011). In 2011 Duncan mused that 'I don't think anyone in the country has done more over the past 15 to 20 years than Wendy Kopp to identify the talents and characteristics that lead to great teaching' (cited in Strauss, 2012). In short, in the space of 20 odd years, a quixotic proposal from a senior thesis had become 'very much part of the American education establishment' (Goldstein, 2011, para. 3). How did TFA become so influential? What can the rise of TFA tell us about the broader politics of education reform? And what does it tell us about the dynamics of institutional change in complex policy sub-systems more generally? This thesis represents a novel effort to capture and chronicle the kinds of influence that Teach

for America has accreted and exerted, and further, to identify and explore the conditions that have enabled it to do so.

Political analyses of American education policy typically describe a highly fragmented system, laden with veto points, plagued by vested interests and principal agent problems, and thus strongly resistant to reform (D. K. Cohen & Moffitt, 2009; Cuban, 2015; Mehta & Teles, 2012; Payne, 2008; Tyack & Tobin, 1994). Teachers unions, in particular, are identified as a powerful ‘stabilising force’ in American education: ‘They shape public schools from the bottom up through collective bargaining, and shape them from the top down through their extensive involvement in state and national politics.’ In several recent accounts, this ‘vested interest’ is singled out as the major ‘constraining effect on more than a quarter century of attempted reform’ (Greene, 2015; Howell, 2005; Moe, 2017, p. 24, 2019; Peterson et al., 2014; M. R. West et al., 2012). Yet despite these much studied impediments to change, there is, nevertheless, a broad consensus in recent scholarship that significant shifts *have* occurred over the past decade or so, albeit in a more piecemeal and protracted fashion than many reformers would wish. Most observers agree that the structure and shape of American schooling is notably different today in large part because of the emergence of a reformist coalition from within the policy sub-system itself (F. M. Hess & Henig, 2015; Mcguinn, 2012b, 2012a; Mehta & Teles, 2012; Moe, 2011, 2015, 2017). In short, we have entered an era of ‘jurisdictional challenge’ in which the traditional powerholders and structures of American public education are not nearly as impregnable as they once were (Mehta & Teles, 2012).

Few observers demur that Teach for America has played an indispensable role in the development of the contemporary reform movement. The dramatic growth of ‘no

excuses' charter school networks (M. Higgins et al., 2011; Kretchmar et al., 2014), the legitimisation and popularisation of alternative teacher certification (Kretchmar et al., 2018; Russo, 2012), and the passage of various state- and district-level school reforms (Brill, 2011; L. Finger & Lastra Anadon, 2018; Mathews, 2007, 2009) have been attributed to the influence of the Teach for America organisation and its now sizeable alumni network. Collectively, these developments have eroded the uniformity of the traditional system, and 'challenged the jurisdiction' of teachers' unions and traditional colleges of education over professional standards and practices, and policy agendas (Mehta & Teles, 2012).

While the education reform movement of recent decades is unarguably bigger and broader than Teach for America, boosters and detractors agree that without TFA, reformers would not have enjoyed the success that they have to date (M. Higgins et al., 2011; Kretchmar et al., 2014, 2018; Moe, 2011, 2017). It is also important to note that not all, or even most, TFA participants are pro-reform protagonists, but the organisation's record of minting influential innovators and agitators for reform is unsurpassed. In the estimations of Jal Mehta and Steven Teles the advent and growth of TFA has been the 'most important' element in forging a 'jurisdictional challenge' to the traditional custodians of the American education system, because it secured a 'ready source of ideologically amenable human capital' without which the reform movement would have struggled to gain coherence, momentum and purchase *within* the sub-system (2012, p. 11).

This thesis focuses on TFA specifically, rather than the reform movement at large, because a narrower lens offers analytical leverage on an otherwise rubbery concept. As Terry Moe notes, the education reform movement is an 'amorphous mélange' of groups,

rather than a ‘united neoliberal army’ (Moe, 2017, p. 11). By tracking the evolution of this totemic, essential, and pioneering element of the reform coalition (and one that prefigured and incubated so many other others) I gain insight into the broader question of how reformers mounted a plausible challenge to the actors and structures that comprised the traditional regime.

This thesis also yields insights about agents and modes of change in policy sub-systems more generally. The observed pattern of education reform in the past decade or so - of which TFA has been a critical driver - is not well explained by canonical models of institutional change. *Contra* Baumgartner and Jones (1993), the main developments were not occasioned by a sudden exogenous shock, which rendered education issues momentarily salient with the public, and thereby upset the monopoly of sub-system incumbents. Critical shifts in structures and practices have been driven largely from the bottom up by agents within the sub-system, aided by philanthropic sponsorship and top-down policies permitting innovation and competition (Hess & Henig, 2015; Mehta & Teles, 2011; Reckhow, 2013). Change has unfolded gradually, across myriad venues, through the cumulative, but only loosely coordinated actions of individuals, many of whom share a common experience, mindset, and pathway into the system because of their affiliation to TFA. Nor is the process well described by Kingdon’s (1995) famous analogy of policy entrepreneurs waiting for an open window, as if surfers anticipating a cresting wave. Because TFA has placed individuals at the heart of the public education system they have not needed to wait for the serendipitous alignment of ‘problem, political, and policy streams’ in order to unleash innovations and enact change. As embedded agents they can exploit their bureaucratic discretion to do things differently. Over time, this

mode of action has resulted in substantial shifts in the structure and overall coherence of the original system.

I argue that a model of subversive agency, derived from recent advances in new institutionalist theory, provides a more plausible explanation of how Teach for America has infiltrated and substantially altered the American education landscape. Following James Mahoney and Kathleen Thelen, I define ‘subversives’ as agents who work to change a system ‘from within it.’ A subversive organisation underwrites institutional change by recruiting, cultivating, and resourcing disruptive agents. Crucially, such an organisation operates ‘to the extent possible, under the radar of the dominant actors’ (2009, pp. 25–26). Subversive organisations and agents exploit the fact that incumbent interest groups have limited and imperfect information about the preferences and capacities of rival groups to affect change. Incumbent forbearance or obliviousness permits subversive actors to instigate change by introducing innovations into the system that slowly undermine the coherence of the traditional regime, and by obtaining positions of power within institutional hierarchies. Because subversive-driven change unfolds in a disaggregated and gradual way, it is oftentimes difficult for incumbents to detect its cumulative significance, until the status quo has already been substantially undermined. I argue that viewing TFA in subversive terms helps to explain its striking success in catalysing change over its nearly three decades of operation, and also helps to explain why teachers’ unions – long considered the dominant force in American education (Moe, 2011, 2017, 2019) – have only belatedly moved to stymie the spread and impact of the organisation.

Drawing on an array of documentary sources and interviews with key protagonists and expert observers, I use process tracing to analyse TFA's ascension. The use of process tracing allows me to distinguish whether or not a subversive model of change was operative, and to disentangle the extent to which other explanatory factors have contributed to TFA's legacy of change. A more detailed discussion of research design and methodology can be found at the end of this chapter.

I show that TFA entered the education system in the early 1990s as a pragmatic and small-scale response to chronic teacher shortages. Over time, it developed a more explicit and ambitious mission of fostering a cadre of 'leaders for systemic change' (Kopp, 2001a). The initially ambiguous preferences and uncertain capacities of Teach for America allowed it to gain a foothold in a system largely hostile to change and change agents. While teachers unions are today highly antipathetic towards TFA, that was not the case in the early 1990s. Back then, unions were broadly acquiescent to the new organisation because it was not supplanting, nor claiming equivalency to, certified and traditionally trained teachers, and TFA corps were filling otherwise intractable vacancies. Though exponents of traditional approaches to teacher education, such as Linda Darling-Hammond, railed against TFA in the early 1990s, their criticisms were confined to TFA's role in undermining teacher professionalisation. They did not foresee TFA as a vehicle of broader reforms to the overall system. Moreover, teacher educators did not exercise any meaningful influence over school staffing decisions – unlike teachers unions, school principals and district administrators. Among these *de jure* and *de facto* veto players, TFA was viewed as a pragmatic solution to an otherwise insoluble staffing problem. Quite simply, the main incumbents – those actually empowered to deny TFA access to the system – did not anticipate the disruptive juggernaut that TFA would become.

It is not clear whether TFA's founding leadership team always intended for TFA to develop into a pipeline of reformers. Certainly, TFA was conceived with the aim of disrupting traditional approaches to teacher recruitment and training, but a desire to overhaul the wider education system only became publicly manifest much later. Wendy Kopp has retrospectively suggested that 'building a movement' for wider change was her intention from the very outset, but earliest enunciations of TFA's mission make no mention of these broader ambitions (Kopp, 1989, 2001). It is possible that TFA wittingly 'fronted' as a labour shortage solution knowing all along that systemic disruption was the endgame. On the other hand, it is more plausible that TFA's remit evolved iteratively and organically as developments both endogenous and exogenous inclined the organisation's leadership to broaden its scope of impact. In other words, TFA's subversive aims and activities most likely transpired as an organisational adaptation. In any case it is immaterial to the argument I advance which of these is a more accurate construction of events. My argument revolves around the potency of inside agency, and the initial obliqueness of subversive preferences and actions. Whether or not that obliqueness was the product of a deliberate bait and switch or of a gradual adjustment in TFA's objectives and capacities does not ultimately matter. For a subversive explanation to hold, it is not necessary to posit a conspiracy. It is enough, simply to say that key actors in the system *did not foresee TFA's long term potential* as a catalyst for broadscale change. In short, TFA's entry into a system ordinarily highly resistant to disruptive actors was possible because incumbents did not anticipate what TFA might become.

Preordained or otherwise, the foundations of a dense and ultimately influential network of activist teachers, principals, bureaucrats, and policymakers, were laid at TFA's

inception. TFA's explicit targeting of the 'best and brightest' enabled the organisation to recruit individuals who would not ordinarily set foot in disadvantaged schools and who were temperamentally inclined to make a rapid impact. Moreover, TFA exposed its young participants to some of the most abject failures of the American education system, encouraging many to draw common conclusions about the need for change and to devote themselves to the cause of reform long term. In addition, the fact that TFA corps members bypassed traditional professional induction by education schools and did not necessarily foresee an entire career in the classroom created a cadre of individuals more inclined to disrupt the status quo than to perpetuate it. Finally, TFA's increasingly extensive efforts to cultivate deep ties among its alumni provided the broader reform movement with a rapidly expanding network through which to disseminate job opportunities, policy ideas, and solidarity.

Once the extent of TFA's burgeoning influence within the reform movement became widely manifest in the mid-to-late 2000s, TFA began to encounter much stronger opposition from interests vested in traditional education structures. Critics of the organisation correctly identified TFA as a major driver of charter school growth and the progressive liberalisation and diversification of teacher education. Simultaneously, in several major urban districts TFA alumni courted the ire of unions by spearheading reforms focussed on greater teacher accountability and expanded school choice. In response to these developments, unions and other allied groups have, in recent years, mounted a multipronged campaign against TFA which has resulted in major school districts terminating longstanding contracts, diminished TFA recruitment, and the tarnishing of the organisation's once 'rapturous' public reputation (Goldstein, 2014b). TFA is sufficiently woven into the fabric of the contemporary system and retains enough

rich and powerful friends that it is not existentially threatened by the current backlash, but the growth of the organisation has been arrested and TFA reformers today face much more organised and fierce resistance.

The obscurity and ambiguity of purpose that characterised TFA's early years and initially underwrote its capacity to exert influence on the American education system, have long since evaporated. As a 'known quantity,' TFA must now fight for change like any other interest group, albeit one with adherents embedded at all levels of the education system, and disproportionate influence among policymaking elites. In the past few years, TFA has tried to defuse conflict with teachers' unions and other powerful groups by highlighting a shared liberal agenda. Though tensions between education 'reformers' and 'the establishment' have dissipated somewhat from the highpoint of the Obama years, TFA continues to attract the ire of teachers' unions and their legislative allies. Despite the present difficulties, however, TFA can still lay claim to a consequential legacy of change in the form of several agenda-setting national charter school networks, numerous alternative teacher recruitment and training programs, and an extensive catalogue of district, state, and national policy changes instigated by alumni.

My subversive model of change provides a more complete account of recent shifts in American education than existing explanations centred on new modes of philanthropy, the dominance of 'neoliberal' ideas among policymaking elites, and changes in interest group power. While each of these factors is indispensable, they are not in themselves sufficient, because they do not acknowledge the central problem of *agency* in re-casting large and complex policy sub-systems. A dramatic increase in philanthropic giving to 'non-traditional' providers and actors in school education during the early 2000s has

unquestionably underwritten and accelerated change. But change-minded philanthropists needed sympathetic agents *to give their money to*. Teach for America provided a significant source of ideologically aligned actors working within the traditional system but eager to disrupt it. Similarly, while neoliberal ideas about education reform were certainly ascendant for much of TFA's existence, it takes more than a favourable *zeitgeist* to mount a challenge to traditional powerholders. The hegemony of neoliberal ideas among political elites did not overcome fierce resistance to choice and accountability reforms among most sub-system agents. Teachers' unions, education faculties, and the 'education establishment' at large, have always been hostile to the 'neoliberal' program of reform. Through collective bargaining and participation in elections (especially at the level of local school boards) unions retain real power to set professional standards and norms and generally shape what happens day-to-day in the American school system. Consequently, neoliberal policymakers needed votaries that worked at the heart of the system if their reforms were going to penetrate. In short, *ideas need agents* to take them up.

Nor are the recent changes in the system fully accounted for by variations in interest group power. The dominance of teachers' unions has been eroded in certain places in recent decades. Right-to-work laws and bans on agency fees have affected membership and revenues, and union resources have been spread thinner by the need to defend against more than three decades of attempted top-down reform. Though the relationship between union resources and power is by no means linear, fewer members and less money certainly complicates the projection of influence. Simultaneously, public sympathy for teachers' unions ebbed away throughout the 90s and 2000s (Peterson et al., 2014) and the Democratic party has, in recent decades, and especially at the federal level, proven a less dependable legislative ally than it once was (McGuinn, 2006, 2012). But these

developments do not in themselves explain the on-the-ground changes. It is one thing to weaken the system's incumbents, but it takes organisation and coordination of inside agents to realise the opportunities that waning incumbent strength affords. Weaker unions might allow for the passage of laws *permitting* charter schools and alternative teacher certification schemes or *mandating* more rigorous teacher evaluations. But it takes sympathetic agents to actually *implement* them. An absence of union power does not *automatically* create the innovations and changes in practice that top-down reformers desire. Change requires counter-mobilisation and coalition building from the bottom up as well as the top-down. Analysing how Teach for America came about – the oldest, biggest, and best known source of foot soldiers for the reform movement – thus provides a more complete explanation of recent developments than the literature presently affords.

Teach for America, naturally, has many detractors. Among the most common critiques are that the organisation contributes to high levels of teacher turnover in chronically under-served schools (Goldstein, 2015); that it undermines teacher professionalism (Darling-Hammond, 1994; Ravitch, 2014); that it embraces and embodies a dilettantish *noblesse oblige* model of change (Labaree, 2010; Popkewitz, 1998); and that its corps members are, at best, only marginally more effective than traditionally prepared teachers in the classroom (Darling-Hammond et al., 2005; Glass, 2008b; Kane et al., 2008; Laczko-Kerr & Berliner, 2002; Raymond et al., 2001; Xu et al., 2011). TFA's supporters counter that corps members turn over no more frequently than traditionally prepared teachers in high-needs schools (Neild et al., 2003); that traditional teacher credentialing is not the same as professionalism (Kamenetz & Westerfelt, 2014); that TFA has raised the prestige and profile of teaching as a career and focussed the empathy and energies of thousands of young Americans on the injustice of educational inequality (Kopp, 2001a;

Kopp & Farr, 2012); and that if, after a summer's preparation, TFA corps members can perform comparably to traditionally prepared teachers, that is more of an indictment of traditional teacher preparation than it is of TFA (Goldstein, 2015). Understanding these divergent perspectives is important, but this thesis is *not* an arbitration of the by now well-rehearsed arguments over the normative merits of Teach for America. Nor is it an apologia or excoriation of the choice and accountability policies of the reform movement at large. Whether or not charter schools, test-based accountability, or merit pay schemes have been good or bad for the overall health of the American education system is, to a large degree, a matter of ideological perspective. Answers to these important questions are complex, heavily contextually dependent, and beyond the scope of this thesis. This is a study of the dynamics of change – be it for good or ill – in complex policy sub-systems. TFA is of interest here because of the shifts in practice, structure, and policy that it has catalysed and abetted. I am concerned with *how* and *why* change was possible rather than the normative merits of the change itself.

In conclusion, recent developments in the American education system show that even policy domains dominated by powerful interests are not impregnable. Incumbents are not omniscient nor invulnerable to ‘under the radar’ efforts to yield change. The example of Teach for America shows that the principal-agent problems that so often frustrate top-down reform can be partially overcome by placing sympathetic agents on the front lines of sub-systems and working from the bottom-up. The TFA case also shows that building a counter-movement of agents sympathetic to reform is not straightforward or quick, and suggests that the complex and protracted task of challenging entrenched regimes may be best approached *obliquely*. TFA did not directly attack dominant groups in the system, but instead forged a vital nursery of change-agents whose actions cumulatively undermined

incumbent control and the uniformity of the traditional system. By shedding light on *how* some of the changes that have recently roiled the American school system came about, this thesis makes a novel contribution to the politics of education literature. By elucidating and further developing the concept of ‘institutional subversion’ and illustrating its utility with a novel application, this thesis contributes to the ongoing theorization of institutional change.

The following paragraphs provide an overview of the organization and progression of this thesis.

A roadmap of the thesis

2. Why the American education system is hard to reform: Teach for America in context

This chapter surveys the contemporary structure of education governance in the United States and how it developed. It charts the shift from an era of ‘institutionalisation,’ during which broadening access and standardising the provision of schooling were paramount, to the present era with its emphasis on performance and economic competitiveness (Moe & Wiborg, 2017). It looks at recent partial shifts in the locus of education governance from single purpose local decision-making bodies to general purpose decision-making bodies at higher levels of government (Henig, 2013). I discuss how teacher union influence has varied over time and space and survey the other key actors in the policy sub-system. I explain why top-down reforms have often failed to live up to their promise, because they have struggled to overcome principal-agent problems and the continued power of vested interests at the local level. Moreover, I show how choice-based reforms of the 1990s did not immediately bear fruit for want of a sufficient supply of individuals

and organisations equipped to construct alternatives to traditional models of schooling. Next, the chapter canvasses the recent emergence of a pro-reform coalition and details how a critical mass of new actors has ‘challenged the jurisdiction’ of traditional power holders and eroded the coherence and uniformity of the traditional system (Mehta & Teles, 2012). Finally, this chapter enumerates the dimensions of TFA’s influence on US education and its centrality to the reform coalition that emerged in recent decades. In other words, it explains why we should care about TFA as an instigator of change.

3. An Elaboration of the Concept of Institutional Subversion

This chapter derives a model of subversion from public administration and historical institutionalist scholarship. I explain why an infiltrative bottom-up strategy of change making can gain traction in policy sub-systems characterised by high degrees of agent discretion and powerful professional interests vested in the status quo. My model of change through subversion draws on cases from an array of policy domains to illustrate the generalisability of the conceptual argument beyond American K-12 education. I then specify the observable implications of this model for the TFA case, and canvass the alternative explanations for recent shifts in education system structures and outcomes. I conclude by discussing how a subversive model of change complements and enhances existing explanations, because it shows how, through agent action, new ideas and new money are translated into concrete changes in practice and structure. Moreover, it explains more fully than extant accounts, how even small openings afforded by waning incumbent strength are practically exploited through the coordinated action of within-system agents.

4. Foundation and Infiltration: The Early Development of Teach for America, 1989-1999

This chapter outlines the historical and ideational context out of which TFA emerged. It covers the period of TFA's establishment in the early 1990s and its first decade of growth up to 1999. Using process tracing, and drawing on a rich array of documentary and interview evidence, it shows how TFA built the initial foundations out of which a network of change agents could emerge. Because of TFA's outwardly modest mission to address teacher shortages – a problem that the system's incumbents had been unable to resolve – the nascent organisation was tolerated by the teachers' unions. Moreover, TFA's modest size and contingent start-up nature meant that few foresaw its potential to become a critical incubator of reform, even though the rudiments of a reform movement were present from the start. It shows that TFA's major adversaries in the early years were education professors, but the concerns of teacher educators did little to temper superintendents' and principals' desperation to fill vacancies and thus their preparedness to contract with TFA.

5. Growing the Organisation and its Impact: 2000-09

This chapter explains how and why TFA grew in size and geographic scope from around 2000 onwards, largely 'under the radar' of system incumbents. It charts the steady evolution in TFA's outward positioning from a pragmatic solution to teacher shortages to a pipeline of 'systemic reformers.' It documents the spread of TFA-instigated innovations and reformist TFA alumni from the system's periphery to its centre. I show that by the end of its second decade, Teach for America had forged an influential cadre of reformers and their impact was starting to antagonise incumbent interests and attract widespread media coverage. In particular, the reforms of TFA alumna Michelle Rhee in Washington D.C. and the dramatic overhaul of the New Orleans education system, led in large part,

by TFA and TFA-allied organisations, garnered significant national attention and engendered a backlash from teachers' unions and other defenders of traditional public education.

6. Exposure and Reprisal: 2009 to present

This chapter explains how TFA's outsized influence on education policy ultimately provoked a backlash from interests vested in the traditional structures of the American education system from around 2009-10 onwards. The prominent role of many TFA alumni in recent contentious reforms has provoked reprisals from teachers unions' and union-allied activists, who have begun to organise much more purposefully against TFA. As a result, TFA is having a much harder time recruiting corps members, has been expelled from certain school districts under union pressure, and its expansion to new regions has stalled since 2015. Nevertheless, TFA remains entrenched in many places, the organisation continues to enjoy the support of powerful elites, and the TFA-spawned innovations that have cultivated a constituency of their own – such as certain charter school networks and alternative teacher training models – continue to spread throughout the system. I conclude the chapter by examining how TFA has responded to this backlash and speculate on the future of Teach for America now that it is a 'known quantity' and powerful opponents have TFA in their sights.

7. Conclusion

This chapter considers the generalisable lessons from the foregoing analysis of Teach for America's legacy of change. I compare and contrast the case of TFA with other instances of 'institutional subversion' across countries and policy domains. I also consider instances of failed subversion in order to develop a more refined understanding of the conditions under which subversive action can succeed. The case of TFA shows the potential

dynamism of policy sub-systems – even those dominated by powerful vested interests. In short, these institutions may be more amenable to change than earlier accounts have allowed. I suggest that while my model of subversion is demonstrably generalisable beyond American K-12 education, it would certainly profit from further empirical testing in different policy domains and national contexts.

Research Design, Methods, and Data

Why a case study?

This thesis asks how it is that Teach for America has accreted influence and wrought important changes in the American education system. What factors enabled this unlikely entity to make a consequential impression on a system habitually characterised as unyielding and resistant to change? There are three broad approaches for investigating questions of causality in the social sciences: experimental designs, statistical methods, and case studies (King et al., 1994). The nature of the research question renders a case study approach the only feasible one. An experimental approach is simply unworkable. We cannot ‘re-run’ the last thirty years of activity in the American education system, adding and subtracting various conditions to ascertain their marginal effects. In any case, the marginal effect of Teach for America on the contemporary structure of the system is not the primary concern of this thesis. That TFA has had an independent and notable system-wide influence is, rather, an underlying premise of the puzzle this thesis addresses. While I endeavour to document and elucidate the nature and extent of this impact, my preeminent concern is to explain *how* TFA managed to affect widely observed changes in a system where both extant theory and empirics suggest that change is rare and hard won.

A statistical approach, while useful for bolstering the underlying premise of the research puzzle (as well as elements of the argument I advance), is likewise ill suited to the task. Like experiments, statistical methods are ideal for studies aimed at establishing the marginal effect of cause X on outcome Y (Goertz & Mahoney, 2012; Soifer, 2012). But this thesis aims to discern the intervening processes and mechanisms that explain *how* cause X has precipitated outcome Y . It takes as its point of departure the readily observed and widely acknowledged (albeit imperfectly measured) premise that the advent of Teach for America has substantially influenced contemporary practices and structures in the US education system. Only a case study approach can provide the fine-grained analysis and close attention to intervening causal processes that the research puzzle demands.

Case study research endeavours to ‘peer into the box of causality to the intermediate causes lying between some cause and its purported effect’ (Gerring, 2004, p. 348). The aim is to comprehensively explain a single case, rather than to establish generalisations across a universe of cases. A high degree of *internal* validity is thus traded off against high degrees of external validity. Careful case selection (often informed by statistical or experimental analysis), and well-constructed comparisons across cases, do however, permit more general theorizing using the case study method.

A *case* may be understood as ‘a specific phenomenon (a unit) that is spatially and temporally delimited,’ while a case *study* ‘looks at the sequence of events that produced an outcome, rather than just the outcome itself’ (Ulriksen & Dadalauri, 2016, p. 225). The case study approach is best understood as a ‘broad-gauge, general method’ within which more narrowly specified techniques (such a process tracing and within-case comparisons)

may be pursued (Lijphart, 1975, p. 685). Case study research must make clear, justified decisions about when cases begin and end.

Determining the temporal and spatial bounds of a case is not always straightforward. The starting point of the case at hand can be reasonably approximated to the year 1989. This is the point at which Wendy Kopp conceived of the ‘Teacher Corps’ that, in the ensuing years, developed into Teach for America. That said, many of the constitutive ideas that Kopp synthesised in developing TFA, as well as the broader policy and political climate that informed and contextualised TFA’s inception pre-date 1989. Hence, the period immediately preceding the foundation of TFA is surveyed in Chapters 2 and 4. Given that TFA continues to exert an ongoing influence on American education policy, the case cannot be said to have concluded, though the ‘subversive’ dimension of TFA’s ascension certainly has. Consequently, I have endeavoured to document TFA’s activities and influence up to the present moment. These findings are discussed in Chapters 6 and 7. With regard to spatial scope, the case encompasses the entire American education sub-system. As defined in Chapter 3, a sub-system is distinguished by a substantive issue and geographic territory, includes an array of stakeholders, spans multiple levels of government, and overlaps other policy sub-systems (Cairney & Weible, 2015). Consequently, the spatial scope of the case is the United States in its entirety, though certain school districts, states, and particular policy dimensions of the education sub-system are accorded more attention than others because they are particularly relevant to the TFA story and provide especially probative evidence for the posited theory.

Within-Case Variation

The case of Teach for America combines both spatial and temporal variation. ‘Within unit’ spatial variation arises from the fact that education governance in the United States is divided among more than 14,000 school districts, fifty states plus the District of Columbia, and the federal government. Moreover, Teach for America operates on a regionalised model, resulting in different concentrations of corps members and alumni across different parts of the country. The distribution of TFA, the severity of educational needs, the power of teachers unions, the peculiarities of local education governance, and so on, vary considerably within the overall unit. That TFA has had a more profound impact on education policy and structures in some places than others helps us to identify which variables matter, under what circumstances, for changemaking through ‘subversive’ action.

Temporal variation arises from the fact that TFA has grown in size and impact since its foundation in the early 1990s to the present day. Likewise, variables hypothesised to affect TFA’s growth and expansion, such as philanthropic support, and district, state, and federal policy settings vary over time. Similarly, variables posited to influence TFA’s capacity to affect change within the system, such as how TFA outwardly presented its mission, how incumbents perceived TFA, and the raw power of incumbent groups to thwart challenges to their control also vary over time. By juxtaposing the same spatial unit at different points in time (for instance TFA’s reception in Chicago in 2000 versus 2009/10), and by comparing different spatial units at the same point in time (for instance, New York City versus rural Louisiana in the early 1990s) I can draw inferences as to when and how particular factors matter for subversive driven change.

Process Tracing

Process tracing disaggregates a hypothesised causal chain into discrete steps and conditions, each of which is testable by the presence or absence of its ‘observable implications’ (Beach & Pedersen, 2012, p. 4; Bennett & Checkel, 2014a). By requiring the researcher to meticulously specify all necessary steps and conditions in the hypothesised causal chain and their corresponding ‘observable implications,’ PT guards against uncritical ‘story telling’ (Gerring, 2007, p. 184).¹ Several characteristics of process tracing (PT) make it an apt method for this investigation. First, PT permits the identification of a causal process between a known input (the advent of TFA) and outcome (consequential changes in the education system), even in instances where ‘the theory foresees a complex causal process over a lengthy period’ (Mahoney, 2012; Ulriksen & Dadalauri, 2016, p. 229). Second, process tracing provides a high degree of internal validity because it is ‘context sensitive’ and ‘places theory and data in close proximity’ (Checkel, 2006, p. 369). Correspondingly, good PT requires deep case knowledge on the part of the researcher. Finally, PT can be fruitfully combined with within- and across-case comparisons to bolster confidence in the posited mechanisms. Because even single case studies encompass either temporal or spatial variation (and oftentimes both) the researcher is afforded some control over multiple variables (Bennett & Checkel, 2014a, p. 29).

¹ Such a disciplined focus on causal mechanisms does, however, give rise to the challenge of ‘infinite regress,’ whereby the research looks as ‘steps between steps...at ever-smaller increments of time and more detailed levels of analysis’ (Bennett & Checkel, 2014a, p. 11; King et al., 1994). Although there is no infallible rule about when to stop PT, Mahoney (2001) argues plausibly for a ‘sufficiency’ standard – i.e. that the mechanisms are sufficiently specified that they can, without intermediate steps, generate the outcome of interest.

The execution of process tracing in this thesis

Process tracing relies on the development of a causal model that is thoroughly specified and testable against empirics and alternative explanations. As Bennett and Checkel stipulate, the ‘major theoretical categories’ of explanation encompass ‘actors’ material power, institutional constraints and opportunities, and social norms’ (2014b, p. 23). Chapter 3 elucidates the alternative explanations for recent observed changes in American education, while subsequent chapters interrogate the sufficiency of explanations grounded in interest group power, philanthropic investment, and neoliberal ideation, alongside the posited ‘subversive’ model.

Process tracing requires the operationalisation of the posited model by stipulating in fine-grained detail what evidence one would expect to observe if each link or condition were indeed present in the empirics of the case. These individual pieces of supporting evidence are frequently referred to in the literature as ‘observable implications’ (Bennett & Checkel, 2014a, p. 30) or ‘causal process observations’ (CPOs) (Collier & Brady, 2010, p. 20). The causal mechanism itself is ultimately unobservable, but its existence and action can be inferred with increasing confidence as the quality and variety of CPOs increases (Hay, 2005). The inferential weight of a piece of evidence depends on its uniqueness and its certainty (Collier, 2011; Van Evera, 1997, pp. 31–32). On this basis, Van Evera devises four tests: *Hoop tests* identify evidence that is certain but not unique – in other words, an explanation that fails a hoop test must be disqualified, but the passing of a hoop test does not definitively confirm an explanation.² *Smoking gun tests* identify evidence that is unique,

² For instance, the presence of a suspect in the vicinity of a crime at the time it was committed is a form hoop test. If it can be shown conclusively that the suspect was not within the vicinity at the time the crime was committed the hoop test is failed and the suspect is exonerated. By contrast, if he was in the vicinity, the hoop test is passed. The suspect remains under suspicion, but we require more unique evidence to indict him (Collier, 2011; Van Evera, 1997, pp. 31–32)

but not certain.³ *Doubly decisive tests* are both unique and certain.⁴ Finally, *straw-in-the-wind tests* are neither wholly certain nor decisive, but provide circumstantial evidence that supports the hypothesis.⁵ As Mahoney notes, several *straw-in-the-wind tests* all pointing in the one direction can increase confidence in one explanation over others (2012, p. 584). A table at the end of Chapter 3 specifies the tests employed in this thesis to ascertain the validity of my contention that TFA operated and substantially succeeded as a subversive entity. The results of these tests and of the empirical tests of alternate theories are discussed in the conclusion of the thesis.

Having devised the tests, it then remains to interrogate the case for the presence or absence of the identified observable implications or CPOs. Different models present different evidentiary challenges for process tracing. The causal model and alternative explanations presented in this thesis employ elements of rational choice, institutional, and ideational theory. Each of these modes of explanation presents a particular set of ‘process tracing opportunities and challenges,’ because ‘the veracity, accessibility, and biases of evidence are often specific to the explanations a researcher is considering’ (Bennett & Checkel, 2014a, p. 31). For instance, the model of subversion presumes that both subversive and incumbent actors behave in boundedly rational ways given their respective preference functions. In other words, ‘they choose courses of behaviour that maximise the expected value of likely outcomes given the information available to them’ (Bennett & Checkel, 2014a, p. 31). Evidence of actors’ preferences, the information available to

³ To use Van Evera’s (1997) example, a smoking gun in the hand of a suspect shortly after a shooting murder is highly suggestive of guilt, but is not absolutely certain. Conversely, the absence of a smoking gun in the hand of the suspect, does not exonerate him.

⁴ For example, a CCTV camera capturing the faces of armed robbers as they entered a bank provides very strong evidence with which to indict a guilty party and exonerate the innocent.

⁵ For example, a suspect purchasing a gun in the weeks preceding an armed robbery is suggestive, but far from conclusive.

them at key junctures, and their rational calculations must therefore be sought. However, because actors sometimes have reasons to disguise their true preferences, careful analysis and triangulation must be undertaken before determining that actors' 'revealed' preferences are indeed 'true' preferences. Institutional explanations, on the other hand, require evidence that actors were aware of structural constraints and modified their behaviour accordingly. Finally, ideational theories face the challenge of accurately inferring the true beliefs of an actor, in recognition of the fact that they will often have instrumental reasons for expressing particular opinions. Therefore, stated beliefs that cut against the prevailing *zeitgeist* (i.e. have a high 'audience cost'), beliefs that incurred material costs (for example, the preparedness of certain Democratic party politicians endorse charter schooling and so risk the opprobrium and dis-endorsement of the teachers unions), or beliefs that remained constant irrespective of changing material incentives are more likely to be authentic (Jacobs, 2014, pp. 48–57). As far as possible, these theory specific considerations were taken into account in constructing tests and compiling and assessing evidence.

As Beach and Pederson (2012) note, an explanatory model is only as strong as its weakest link. If there is sufficient evidence to inspire confidence in each of the intermediary steps, then the researcher cannot reject the overall mechanism as posited. If, on the other hand, the evidence is insufficient to sustain a causal link, the researcher must reject and re-specify the mechanism. In the chapters that follow the inferential significance, reliability, and sufficiency of CPOs for the posited model are considered, alongside those of alternate explanations.

Data: Sources and Collection

This thesis employs a broad range of primary and secondary documentary material, as well as extensive interviews with key protagonists in the founding and development of Teach for America and expert observers of the contemporary American education system. As Gerring notes, ‘a hallmark of process tracing...is that multiple types of evidence are employed for the verification of a single inference’ (2007, p. 173). By collecting a large volume of independent observations, I have been able to triangulate between sources, and thereby enhance my confidence in the evidence used to underpin individual links in the posited model (Ulriksen & Dadalauri, 2016). To a large extent evidence gathering was an iterative and exploratory process. Often one source would point the way to another. I applied no ‘hard’ rule about when to stop gathering data. Rather, I have done as much as possible within time and resource constraints, and stopped pursuing particular lines of evidence when it became ‘so repetitive that gathering more of that same kind of evidence [had] a low probability of revising my estimate of the likely explanation (Bennett & Checkel, 2014a, p. 28).⁶

Collection of documentary and statistical material

Among the major documents used were materials produced by Teach for America – in particular, TFA recruitment materials, internal strategy memos, and caches of the TFA website accessed via the Internet archiving site ‘WaybackMachine.’ Kopp’s undergraduate thesis, journal articles and op-eds, and her 2001 and 2012 books also provided useful information about the ambition and framing of TFA, the evolving strategic calculations of the organisation, as well as operational information about staffing

⁶ As Checkel and Bennett note, ‘Bayesianism’ offers a sensible argument’ about when to stop gathering evidence: ‘one stops when repetition occurs’ – that is ‘when it becomes so repetitive that gathering more of that same kind of evidence has a low probability of revising [the researcher’s] estimate of the likely accuracy of alternative explanations (2014a, p. 28).

and sources of revenue. Comprehensive statistics about TFA corps sizes, placement sites, and alumni destinations were provided to the author by Teach for America in April 2018. Survey data about the attitudes of TFA corps and alumni were obtained from Smith (2005), Dobbie and Fryer (2015), Mo & Conn (2018), and Jacobsen *et al* (2014; 2016). Survey data on the attitudes of the teaching profession at large was obtained from the *EdNext* PEPG annual poll (Cheng et al., 2018b). Academic journal and media databases were also systematically searched for material on the development of TFA.

Statistics and other information pertaining to state teacher certification requirements, teacher shortages, and details of alternative certification and emergency licensure were obtained from government and think tank reports (these are discussed in Chapter 4). Evidence of TFA's policy impact was sourced from scholarly analyses of the organisation (e.g. Finger & Lastra Anadon (2018), Kretchmar *et al* (2014, 2018); Higgins *et al* (2011)) and from data provided by TFA and various TFA-linked entities – such as charter management organisations, education advocacy groups, and alternative certification providers. LinkedIn and other online biographical information were used to verify the TFA alumni status of individuals involved in key reform organisations and initiatives. A systematic search of America's leading national broadsheets – the *New York Times*, *Wall Street Journal*, and *Washington Post* – for the term 'Teach for America' between 1990 and 2019 (using the FACTIVA database) enabled me to quantify and characterise the volume and tenor of print media coverage TFA has attracted for the duration of its existence (discussed in Chapter 6). I contend that print media coverage of TFA is an acceptable proxy measure for the public salience and reputation of the organisation over time.

Collection of interview data

In addition to documentary sources, data was sought via face-to-face and telephone interviews with key protagonists and expert observers. These interviews were mainly conducted in person, in various locations throughout the United States, during August and September 2017, in accordance with disciplinary guidelines on best practice and the research ethics protocols of the University of Oxford. A more detailed discussion of interviewee recruitment, interview protocols, and the treatment of interview data can be found in Appendix A. Table 1, below, summarises the interview sample.

Table 1: Summary of Interviews	
Category⁷	Number of Interviewees
TFA Staff Past and Present	17
Scholars, Journalists, and Think-Tankers	14
Union figures and other prominent TFA critics	4
Contemporary Education Reform Advocates	3
Corporate and Philanthropic Supporters of TFA	2
TOTAL	40

⁷ Categories are independent; interviewees spanning multiple categories were assigned to a single category for the sake of clarity.

2. Why the American education system is hard to reform: Teach for America in context

This chapter serves two purposes. First, it aims to elucidate the contemporary structure of education governance in the United States. Why does the system look and behave the way it does and what are the main drivers of stability and change? Second, it surveys relevant literature on American education politics, with particular attention accorded to scholarship on Teach for America. I begin with a brief discussion of the origins of the modern school system in the United States. The expansion and standardisation of educational provision beginning in the Progressive Era and extending through to the 1970s institutionalised many features of the contemporary system. During the latter part of this period, teachers' unions began to organise and gradually emerged as influential actors. With the intensification of globalisation, technological innovation, and international economic competition in the 1970s and 80s, coupled with a crisis in the welfare state and calls for greater government efficiency, a new era in public education dawned in much of the developed world. In the United States, the imperatives of this 'performance era' crystallised into two 'distinctly neoliberal' approaches to reform: enhanced accountability and expanded school choice (Moe & Wiborg, 2017). From the early 1980s onwards, state and later federal governments of various partisan orientations attempted to impose and stimulate greater accountability and competition in schooling provision.

A sizeable literature documents the significant frustration of this largely top-down reform effort owing to powerful professional interest groups pitted against it, acute principal agent problems, and the highly devolved nature of education governance in the United States. Yet, despite the formidable barriers to change, the past couple of decades *has* seen

consequential, if not comprehensive, shifts in educational structures and practices. Charter schooling has grown precipitously in many large urban districts, alternative training and certification of teachers has expanded exponentially, and many states and districts have adopted performance-based teacher evaluations and tenure reforms (L. K. Finger, 2018a; F. M. Hess & Henig, 2015; Howell & Magazinnik, 2017; McGuinn, 2012b; Mehta & Teles, 2012; Ravitch, 2014). In sum, in recent years there has been ‘an adjustment in the balance of power’ within American public education, such that ‘changes have occurred that would not have occurred before’ (Moe, 2015, p. 313). The second half of this chapter surveys the small but growing literature on how these changes came about.

A number of scholars have observed that while recent shifts in structures and practices have been supported by state and federal government intervention, they are less a consequence of legislative mandates, than the result of the cumulative efforts of a reformist coalition that arose within the education system during the past twenty or so years. In other words, changes have largely developed endogenously and from the bottom up, rather than being imposed top-down by elected officials (F. M. Hess & Henig, 2015; McGuinn, 2012b; Mehta & Teles, 2012; Moe, 2011, 2015). In recent years, a number of studies have highlighted the integral, catalytic role played by Teach for America in the development of this coalition. That TFA has been the largest, longest established, and most important source of human capital to the contemporary reform movement is acknowledged by boosters, detractors, and disinterested observers alike. Yet the extant literature offers little explanation of *how*, in a system so apparently resistant to change, TFA managed to evolve from a precarious student start-up to a prime source of effective

change-agents. The final section of this chapter foreshadows the theoretical argument advanced in response to this puzzle in Chapter 3.

From Institutionalisation to the ‘Modern Performance Era’

The United States was something of a laggard among developed countries in establishing a public education system. During the Progressive Era, however, it led the world in *expanding* and *standardising* public education, forging a system then unrivalled in terms of equity and access (Cremin, 1961; A. Green, 1991; Tyack, 1974). The rapid institutionalisation of the Progressive Era established a basic ‘grammar’ of schooling – standard ways of dividing and allocating time, space, and students – overseen by local school boards – that, due to path dependencies and protective constituencies, largely endures to the present day (Tyack & Cuban, 1995; Tyack & Tobin, 1994). The district school board, for instance – an innovation of progressive era reformers determined to expunge partisan patronage and cronyism from school governance – remains the most important policymaking venue in American education, notwithstanding recent incursions from higher levels of government (Anzia, 2018; Henig, 2013; Henig & Lyon, 2019). Moreover, board governance endures despite widespread, long-held concerns about small, unrepresentative turnouts at board elections and the consequent propensity of boards to be captured by employee interest groups (Anzia, 2013; F. M. Hess & Leal, 2005; Howell, 2005; Maranto, 2018; Maranto et al., 2001; Moe, 2011). The persistence of this highly devolved governance structure creates a multitude of veto points that make uniform top-down reform difficult if organised interests at the local level oppose it. Yet for much of the ‘expansionist’ era in American public education, there were no organised interests of any significance chafing against the transformation of a disparate collection of ‘one-room school houses’ into ‘the bureaucratic “one best system” of city administration

that still exists today’ (Mehta, 2013, p. 3). Throughout this period, ‘administrative progressives’ – superintendents, and the locally-elected school boards that appointed them – exercised largely untrammelled control.

The formation of teacher unions in the United States lagged behind similarly developed Western nations because of prohibitions on public sector collective bargaining. The adoption of the National Labor Relations Act (NLRA) in 1935 – a central component of President Franklin Roosevelt’s New Deal – marked a watershed for *private* sector workers. As private sector unionism advanced in the ensuing decades and private sector unions increasingly constituted a core part of Democratic Party support, state labour laws were progressively amended to permit *public* sector unionism. Beginning in Wisconsin in 1959, most states outside of the South adopted public sector labour laws throughout the 1960s and 1970s (DiSalvo, 2015; Freeman, 1986; Moe, 2011, 2017). Throughout this period, the National Education Association (representing the bulk of teachers in school districts of all shapes and sizes across the country) and the American Federation of Teachers (concentrated in big urban districts, such as New York City, Chicago, and Boston) expanded dramatically (Moe, 2017). In 1960, the percentage of teachers covered by collective bargaining was negligible. By 1978 it was 65 percent (Moe, 2011). Union membership grew faster and higher, reaching 75 percent by the early 1970s and enduring at this level for decades. The introduction of more restrictive labour laws during the 2010s in a few states, such as Wisconsin and Michigan, and population shifts to the southwest of the US where unions tend to be weaker have diminished national membership rates and collective bargaining coverage by a few percentage points in recent years, but the NEA remains the biggest labour union in the nation (Moe, 2011, 2017). Today the NEA has over 3 million members, and the AFT around 1.5 million, encompassing not just active

classroom teachers, but also retirees, secretaries, school janitors and sundry other district employees (Moe, 2011, 2017).

As Moe notes, ‘the bigger picture is that by the early 1980s, the teachers union reigned supreme as the most powerful force in American education and its politics, with millions of members, far-flung armies of political activists, enormous wealth for campaign contributions and lobbying, and more’ (Moe, 2017, p. 3). What Progressive reformers had envisioned as a comprehensive and equitable system run by non-partisan professionals, but responsive to local needs and desires, had become a system uncommonly vulnerable to capture by the vested interests of its employees, as subsequent sections detail. Yet, just as teachers unions were reaching the zenith of their power, a push for change was crystallising at the highest levels of American government.

By the late 1970s, oil shocks, rapid globalisation and technological innovation had many Western governments worried about future prosperity and sustained economic growth. The ‘golden era’ of the welfare state abruptly ended, and a period of austerity and retrenchment followed. In the United States, the corporate sector increasingly attributed sluggish growth and diminished economic pre-eminence to the perceived inadequacies of the American education system. Compared with the schooling systems of rapidly advancing nations like South Korea and Japan, business groups and policymakers felt that American schooling left much to be desired (Mehta, 2013; Schneider, 2011). Expanding and equalizing *inputs* into the system was no longer enough; extracting *better educational outcomes* became the core mission (Moe & Wiborg, 2017; Wolbrecht & Hartney, 2014).⁸

⁸ Wolbrecht and Hartney’s content analysis of media coverage, congressional votes, and party policy platforms from the 1968 to 2011 demonstrates a shift away from input-oriented policies focussed on broadening access and equalising provision towards outcome-focussed policies that stressed achievement

In 1982, President Reagan's Secretary of Education, Terence Bell, commissioned a report into America's widely-perceived educational mediocrity. Released in April 1983, *A Nation at Risk* [*ANAR*], heralded a new 'performance-based era' in American education (Moe & Wiborg, 2017). Authored by a high-powered committee of university professors, state and local school personnel, a business leader, and a retired politician, the 'bombshell report' lambasted the competence of the teaching profession, assailed dumbed-down state curricula, and lamented a culture of low expectations that had 'eroded the educational foundations' of the United States:

If an unfriendly foreign power had attempted to impose on America the mediocre educational performance that exists today, we might well have viewed it as an act of war. As it stands we have allowed this to happen to ourselves...We have, in effect, been committing an act of unthinking, unilateral educational disarmament (National Commission on Excellence in Education, 1983, p. 5).

Deploying a belligerent rhetoric uncommon to government reports, *ANAR* turned out to be 'one of the most influential federal documents ever published' (Goldstein, 2015, p. 165).⁹ As Mehta notes, '*A Nation At Risk* created a paradigm that fundamentally recast the terms of the debate around education' (2013, p. 93). In its wake, a welter of reform activity followed. But, in a 'great historical irony,' *A Nation at Risk* 'came along just as the teachers

and accountability: 'attention to excellence rose dramatically in the early 1980s and remained high...Concerns about resources and equality did not disappear, but they lost the dominance they jointly held prior to the 1980s' (2014, p. 611).

⁹ *A Nation at Risk* was hardly alone in making the case for urgent educational reform - at least a dozen contemporary reports echoed its findings - but it was by far the most influential reform document of the decade. The original print run sold out, newspapers reproduced the text in full, and *ANAR* commission members conducted radio and television interviews in prime time (Schneider, 2011). Jal Mehta offers several reasons for its seismic impact: i) The report was commissioned by the government, rather than a think tank or interest group and many of its authors were eminent Americans as well as distinguished educators. Both of these factors gave the report public legitimacy and prominence; ii) The report's recommendations for greater federal involvement in education cut against the prevailing policy of the Reagan administration and this conflict attracted early media interest; iii) The report was released in the depths of a recession and it provided a compelling explanation for the then fast-narrowing gap in economic output between major economic competitors, Japan and South Korea, and the United States; iv) Some of the report's major findings - such as declines in SAT scores, high levels of illiteracy, and the poor performance of American students on international assessments - were striking and readily comprehended by the public; v) *ANAR* had a pungent 'declensionist' narrative - unusual in a bureaucratic document - that appealed to the media and captured the public's imagination (Mehta, 2013, p. 90)

unions were consolidating their power’ and so from the outset reformers were contending with ‘a powerful new foe’ that had both the motive and the means to resist substantially top-down attempts to change the structure of American education (Moe, 2017, p. 3). The sizeable literature on the sources and outcomes of teachers’ union power is discussed below.

Vested Interests, Veto Points, and Principal-Agent Problems

Recent attempts to come to grips with the broad pattern of American education have focused on asymmetries in group power. It is argued that teachers - having a compelling and concentrated interest in keeping their jobs and improving their working conditions – organise into unions and that the power of these unions dwarfs that of all other K-12 interest groups (Greene, 2015; Hoxby, 1996; Moe, 2003, 2011, 2015; M. R. West et al., 2012). Other system stakeholders – parents and students, for instance – are typically too atomised and weakly motivated to get organised (Moe & Wiborg, 2017; Olson, 1965; Wilson, 1980). Consequently, the structure and outcomes of the K-12 system substantially reflect the preferences of the teachers’ unions – preferences that do not always align with the efficient, equitable, and satisfactory operation of the system.

Teachers’ unions have mass memberships; money to fund political candidates, parties, and ballot measures; the capacity to mobilise large numbers of voters and influence public opinion; and they wield the threat of strike and other forms of disruption. Union power is not monolithic, however, as variations in right-to-work laws and the permitted scope of bargaining affect membership and revenues from state to state and district to district (Anzia, 2018; Winkler et al., 2012). In addition to these organisational sources of power, the very structure of K-12 governance in America advantages teachers’ unions. Many of

the key decisions about how schools districts operate and allocate resources are made at the local level where unions are especially influential. Moreover, while teachers unions are less influential at higher levels of government, top-down reforms must overcome multiple veto points and uncooperative or indifferent frontline agents have ample opportunities to compromise the implementation of undesired changes (Greene, 2015; Moe, 2015).

How do teachers' unions exercise power?

Survey data suggests that the main reason teachers join their local union division is to be party to collective bargaining (Moe, 2011). The scope of collective bargaining varies from school district to school district but in general, contract provisions profoundly affect the structure and function of schools (Hess & Leal, 2005). As Moe documents in his 2011 monograph *Special Interest*, common contract provisions include teacher salary amounts and working conditions, as well as rules governing salary increases; teacher transfers, layoffs, evaluations, and dismissals. In other words most of the action in K-12 politics and policy happens at the local level.

Several authors note that local board governance affords a profound advantage to teachers' unions as boards make for weak bargaining partners and are vulnerable to capture by employee interests. School boards are comprised of elected volunteers, many of whom have no professional experience or expertise in educational administration (F. M. Hess & Leal, 2005; Maranto, 2018). Board elections typically attract very low turnout because they are non-partisan, often occur on separate dates from elections for other local, state, or national offices, and usually attract minimal media coverage (Howell, 2005; Maranto, 2018). As the most concentrated, organised, and well-resourced interest group, unions can usually exert an unmatched influence on the outcome of these elections (Anzia,

2013; Hess & Leal, 2005; Moe, 2006a)¹⁰. Moreover, because unions have a big hand in choosing their bosses, it follows that union preferences tend to dominate district politics and local policy and practice will broadly reflect the occupational interests of members. A review of empirical studies finds that more strongly unionised districts spend more on teacher salaries (Brunner & Squires, 2013; Cowen, 2009; Cowen & Strunk, 2015; Duplantis et al., 1995; Eberts, 1983; Eberts & Stone, 1984, 1986; Freeman, 1986; Hoxby, 1996; Kasper, 1970; Lott & Kenny, 2013; Winters, 2011; Zigarelli, 1996) and especially on salaries for veteran teachers (Strunk & Grissom, 2010; West & Mykerezi, 2011; Winters, 2011), even though beyond the first few years, additional experience is not linked to enhanced teacher effectiveness (Chingos & Peterson, 2011; Clotfelter et al., 2006; Rivkin et al., 2005; Rockoff, 2004). Additionally, more heavily unionised districts are much less likely to offer pay for performance or to consider a teachers' impact on student learning in tenure decisions (Goldhaber et al., 2008; Hoxby & Leigh, 2004).

Beginning in the 1980s, and partly in response to union dominance at the local level, state governments began to take on a more active role in public education and took decisions out of the 'unions' favoured venue' (Henig & Lyon, 2019). Yet teachers' unions are, in many places, a powerful force at the state level too. Unions use their large memberships and considerable financial resources to support parties (nearly always the Democrats), candidates, and ballot measures that will shape institutional outcomes in their favour. Combined, the NEA (National Education Association) and AFT (American Federation of Teachers) constitute by far the largest labour union in the US (Cowen & Strunk, 2015) and the NEA and AFT are frequently the largest single contributors to state elections in

¹⁰ A 2006 analysis by Terry Moe found that union-endorsed candidates won Californian board seats over three-quarters of the time (Moe, 2006a).

most states (Lott & Kenny, 2013; Moe, 2011). Polls of experts on US state politics throughout the 90s and 2000s found teachers unions to be the top one or two most powerful influences on state policy in many states, vying for pre-eminence with the business lobby, and frequently outranking AFL-CIO affiliates, bankers, utilities, agricultural and mining interests, doctors and trial-lawyers (Hrebenar & Thomas, 2004; Winkler et al., 2012).¹¹ Empirical analyses have found that union strength does indeed translate into less reform activity at the state level. In the past decade, states with stronger teachers' unions have been less likely to pass legislation instituting performance pay (L. K. Finger, 2018a) or expanded school choice (Hartney & Flavin, 2011). Teacher walkouts in 2018 in southern and southwestern states largely succeeded in extracting significant concessions from state governments, illustrating the raw power of teachers' unions even in deep red states with hostile labour laws prohibiting collective bargaining and agency fees (Henig & Lyon, 2019).

At the federal level, while the teachers unions were the top contributors to national elections between 1989-2009 (Cowen & Strunk, 2015; Moe, 2011), their influence has been less pronounced. A more diverse and competitive interest group ecosystem and the fact that national politicians answer to larger constituencies and are subject more intense media scrutiny dilutes union power, which is why, argue several authors, the most ambitious reforms in recent decades have generally emanated from the federal government (F. M. Hess & Finn, 2007; Manna, 2006, 2010; McGuinn, 2006, 2012b;

¹¹ Between 1990 and 2007, Ron Hrebenar and Clive Thomas systematically surveyed experts in state politics for their perceptions of interest group influence on state politics and policy outcomes. Between 2002 and 2007, in all but two states (Georgia and Missouri) teachers unions were rated among the most consistently effective interest groups. A similar survey of state education policy experts was conducted by Amber Winkler, Janie Scull, and Dara Zeeshanderlaar in 2012. The authors asked experts to select and rank the five most important entities in terms of their influence in shaping state education policy. Teachers unions were the top-ranked entity in 14 states. In only six states did the teachers unions rank fifth or lower in terms of perceived influence.

Mehta, 2013; Moe, 2011, 2015). Yet, while federal policymakers have been less encumbered by vested interests and therefore able to *legislate* reforms, as several scholars point out, the highly devolved structure of US education governance has meant that *implementation* of federally-mandated reforms faced its own set of challenges.

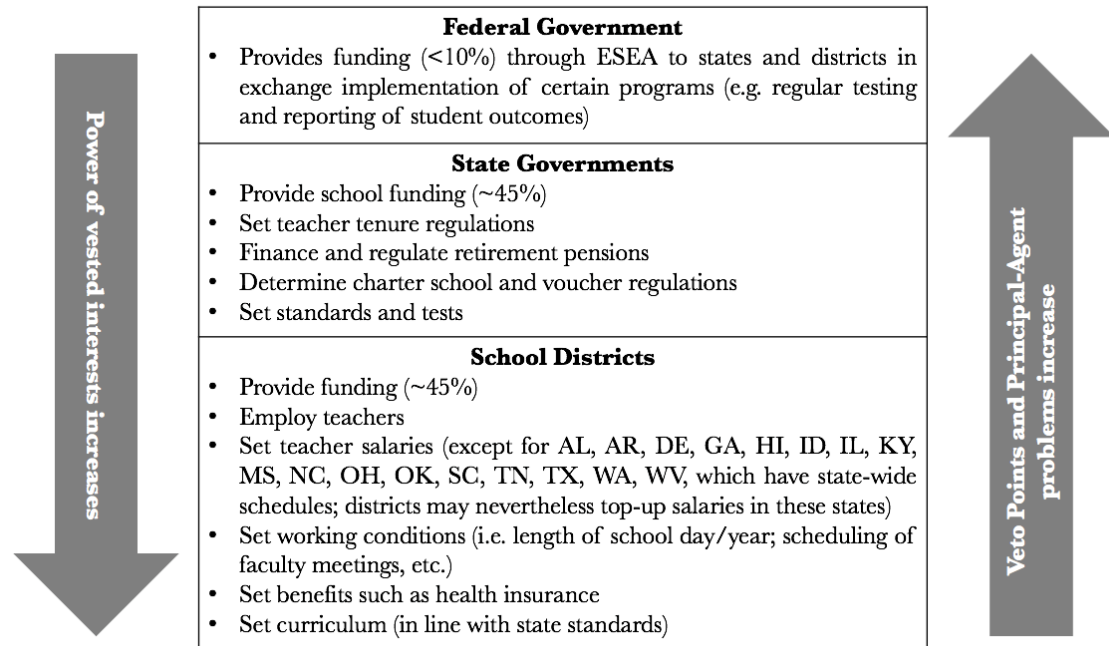
The challenges of delegation are endemic to any large system or organisation, but they are especially acute in American education. Constitutionally-mandated divisions of power, the size and diversity of the system, the organisational strength of unions at lower levels of government, capacity gaps, and the very nature of teaching itself create formidable principal-agent problems for would-be federal (and to a lesser degree state-level) reformers. Experience shows that federal policymakers have a hard time coercing changes in state policy; state policymakers have struggled to induce changes in district practices; and changes in district practices have been no guarantee of changes in the behaviour of principals and teachers at the school level. As Cuban notes, ‘the path from...policies aimed at improving student outcomes and what happens in millions of classrooms is twisted and filled with sinkholes’ (2015, p. 150).

Federal policymakers are distant from the day-to-day realities of American classrooms and have few levers to pull in seeking to influence on the ground realities. Historically, the main vehicle of federal influence has been the 1965 Elementary and Secondary Education Act (ESEA) which directs billions of federal dollars through states and districts to schools, with a special focus on programs for disadvantaged students. In exchange for its funding, the federal government specifies how the money should be spent, and more recently, under the auspices of No Child Left Behind (NCLB) (an ambitious reauthorisation of the ESEA), it instituted consequences for schools that did not meet

mandated standards. Thus, the federal government has tended to ‘[take] the “agents” of schooling as given, and tried through various combinations of carrots and sticks to induce them to alter their behaviour’ (Mehta & Teles, 2012, p. 1). The ultimately disappointing outcomes of NCLB-era accountability reforms (discussed in more detail below), illustrate quite starkly the limitations of top-down ‘carrot-and-stick’ measures in inducing desired changes.

Because federal government initiatives must flow through state and local education agencies, reforms must overcome numerous veto or ‘clearing’ points, all of which present an opportunity for vested interests to denude top-down directives that do not accord with their preferences (Pressman & Wildavsky, 1984). In this sense, obstructionists enjoy a constitutional advantage (Greene, 2015; D. F. Labaree, 2011; McShane & Hatfield, 2015; Moe, 2011, 2015; Tsebelis, 2002). Reformers must win victories in multiple venues, whereas opponents need only succeed at just one veto point in order to neuter or derail changes. Vested interests, therefore, ‘do not need to be enormously powerful. They just need to be powerful enough to block’ (Moe, 2015, p. 295). Real change has to cultivate a supportive constituency among superintendents and teachers who are ‘creatures of habit’ and inevitably exercise considerable professional autonomy. As Tyack and Tobin note in their seminal article, ‘The Grammar of Schooling,’ ‘reformers believe that their innovations will change schools, but it is important to recognise that *schools change reforms*. Over and over again teachers have selectively implemented and altered reforms’ (1994, p. 478). Hence, while federal legislators may be less beholden to vested interests than their state and local counterparts, top-down reform struggles to avoid agent intransigence in implementation. This dynamic is illustrated the figure below:

Figure 1: Sources of Stability in the American Education System



Sources: (Chingos, 2017; Griffith, 2016; National Council on Teacher Quality, 2017; US Department of Education, 2017)

In sum, while a partial shift in education governance to higher levels in recent decades has enabled the *passage* of certain reforms, a shift in decision-making venues cannot overcome fundamental principal-agent problems in implementation. Top-down accountability-based reforms are a fundamentally ‘weak technology’ for instigating enduring change. K-12 ‘agents’ (teachers, principals, superintendents) inevitably exercise considerable discretion in how they go about their work. Monitoring and enforcement costs in education are high and teaching is complicated and multifaceted work that is not readily corralled by a codified set of incentives and sanctions. As Charles Payne notes in his evocatively titled monograph *So much reform so little change*: ‘you cannot simply issue mandates from on high and get real change’ because standards and sanctions do not ultimately change the beliefs and preferences of the agents involved. ‘You issue mandates, you get compliance, and that’s on a good day’ but if the agents are not invested in the changes, backsliding is inevitable (2008, p. 193). The next section explains how vested

interests and principal-agent problems largely explain the substantial frustration of the accountability and choice based reforms that characterised the post-*NAR* era.

Reform in the late 80s to early 2000s: Substantial, but not total frustration

During the 1980s, business groups and state governors provided the major impetus for the passage of educational reforms. The reforms that gained initial traction were ‘essentially common sense, obvious things to do’ such as increasing funding for K-12 education, raising teacher salaries, introducing more rigorous curriculum, and improving teacher training, none of which threatened the underlying structure of the system or its incentives (Moe, 2017, p. 12). Into the early 1990s many state governments, along with the Clinton administration, pushed class size reductions – a popular reform with teachers unions and the public alike – but ultimately an ineffective one (Hanushek, 2003; Hattie, 2005). As it became increasingly apparent that these input-based reforms had failed to improve student outcomes, attention turned to other measures that promised more fundamental changes to incentives and structures: greater school accountability through standardised testing and the movement for school choice (Moe, 2017). In both cases these efforts have met with considerable union hostility, among other challenges. Unions have opposed accountability reforms because they purport to distinguish between high performers and low performers, and therefore threaten the job security and conditions of a swath of the workforce. Likewise, measures increasing school choice, such as charter schooling and voucher schemes, threaten to shrink district enrolments and revenues and thereby imperil the jobs of union members.

Standards and Accountability

Standards-based reform – the notion that what students need to know and be able to do should be clearly stated and reported against – was an almost ubiquitous state government strategy throughout the late 80s and 90s. Up to 1994, when federal legislation encouraged it, new standards had been enacted in 42 states. By 2001, when *No Child Left Behind* mandated it, 49 states had introduced state-wide attainment standards (Mehta, 2013, p. 156). The initial introduction of state-wide standards had cross partisan appeal – Democrats liked the idea that standards would drive better outcomes for poor and minority students, while many Republicans hoped that standards would drive greater public sector accountability and efficiency. The business community, too, was a major proponent. Even the teachers’ unions were lukewarm supporters of this initial wave of standards-based reform, because the new curricula and even the state-wide tests introduced in the 80s and 90s were not usually accompanied by any serious incentives or sanctions tied to results (Moe, 2017). In other words, there were *standards*, but *accountability* was minimal. Teachers’ whose students performed poorly did not stand to lose any salary or risk dismissal. Likewise schools that generated poor outcomes did not attract additional oversight or face the threat of closure. With the introduction of *No Child Left Behind* (NCLB) in 2001, the latter was set to change.

NCLB marked an historic incursion by the federal government into K-12 policy. Modelled on the accountability system from George W. Bush’s native Texas, NCLB required states and districts in receipt of federal funding to institute annual tests of student performance in math and reading. Among other measures, schools were required to demonstrate ‘adequate yearly progress’ towards universal proficiency by 2014 or they would be subject to increasingly severe administrative sanctions aimed at turning them

around (Debray, 2006; Rhodes, 2012). The technocratic logic of NCLB appealed to a broad spectrum of policymaking, media, and business elites. Liberals saw it as a way to distribute resources more equitably; conservatives saw it as a way to ensure that public monies were spent efficiently and to motivate an intransigent sector to change; and civil rights advocates, federal bureaucrats, and courts saw it as a means of focussing an unwieldy system on outcomes rather than inputs (Mehta, 2013). The NCLB Act passed the House by 381 votes to 41 and the Senate by 87 votes to 10 (US Congress, 2002). Signing the act into law, President George W. Bush enthused that ‘today begins a new era, a new time in public education in our country. As of this hour, America’s schools will be on a new path of reform and a new path of results’ (Bush, 2002). History records that nothing so remarkable transpired.

Quite simply, NCLB was flawed in its design and hobbled in its implementation by vested interests and principal-agent problems at lower levels of government. The rhetoric that attended NCLB’s passage heaved with declarations of a tough new regime: ‘no longer is it acceptable to hide poor performance...If schools don’t perform, if, given new resources...they are unable to solve the problem of not educating their children, there must be real consequences’ (Bush, 2002). But the actual measures were pretty weak – in part because teachers’ unions and their allies has bargained away tougher consequences during the bill’s drafting. As Moe intones ‘the major remedies for egregiously low-performing schools – reconstitution...or conversion to charter schools – contained enough loopholes to ensure that they would rarely be carried out. And for teachers...the act did not even try to measure their success at getting kids to learn’ (2017, p. 16). Moreover, the accountability that NCLB did impose on states and schools proved to be a poor instrument for getting compliance anyway. State officials undermined the reforms

by ‘defining proficiency down’ through the adoption of easier state tests and lower cut off points for acceptable attainment (Hess & McShane, 2018). Meanwhile, teachers and administrators found plenty of ways to artificially boost test scores by focussing disproportionate attention on students on the cusp of proficiency, transferring the most adept teachers to tested grades, focusing time and resources on tested content at the expense of the rest of the curriculum, as well as outright cheating (Hess & McShane, 2018; Mehta, 2013). In short, NCLB fell well short of its aims because it was unable to anticipate and correct for the myriad ways that the agents of the K-12 system could defy or depart from the wishes of their principals in Washington.

Separate attempts throughout the 2000s by individual states and school districts to introduce more trenchant accountability measures generally suffered the same fate. The measures adopted were either so watered down in implementation as to be meaningless, or were quickly repealed under pressure from the teachers unions. For instance, in 2008 the then New York City schools chancellor, Joel Klein, sought to bring student test score data (along with other measures) to bear on teacher tenure evaluations. In response, the United Teachers Federation pressured their allies in the New York state legislature to pass a bill prohibiting any district in the state from using test scores in teacher evaluations (Moe, 2017). In 2009, a widely cited report found that 99% of all teachers in a diverse national sample of school districts were routinely rated satisfactory or better. Half of the districts surveyed had not dismissed a single tenured teacher for poor performance in the preceding five years. Yet 43% of surveyed teachers believed there was at least one tenured teacher at their school that merited dismissal (Weisberg et al., 2009). In the wake of these findings, and under federal pressure, many states introduced laws mandating that student learning growth be included in evaluation frameworks, but the outcomes of these efforts

have been largely disappointing (Kraft & Gilmour, 2017). In many states, a high score on a lesson observation and other non-student-growth components can result in a teacher earning near or at the minimum number of points required to gain an effective rating. In 18 states, teachers can receive an overall effective rating even if they achieve the lowest rating on student learning growth (Walsh et al., 2017). As Rick Hess notes ‘public policy can make people do things’ but ‘it cannot make people do those things well’ (2013, p. 19). ‘Even after policies were changed, principals still were not sure what poor teaching looked like, still did not want to upset their staffs, and still did not think giving a negative evaluation was worth the ensuing tension and hassle – especially given contractual complications and doubt that superintendents would back up personnel actions against low-rated teachers’ (2013, p. 22). In other words, in the absence of frontline agents committed to implementing accountability measures with fidelity, state and federal mandates have fallen well short of their intended impact.

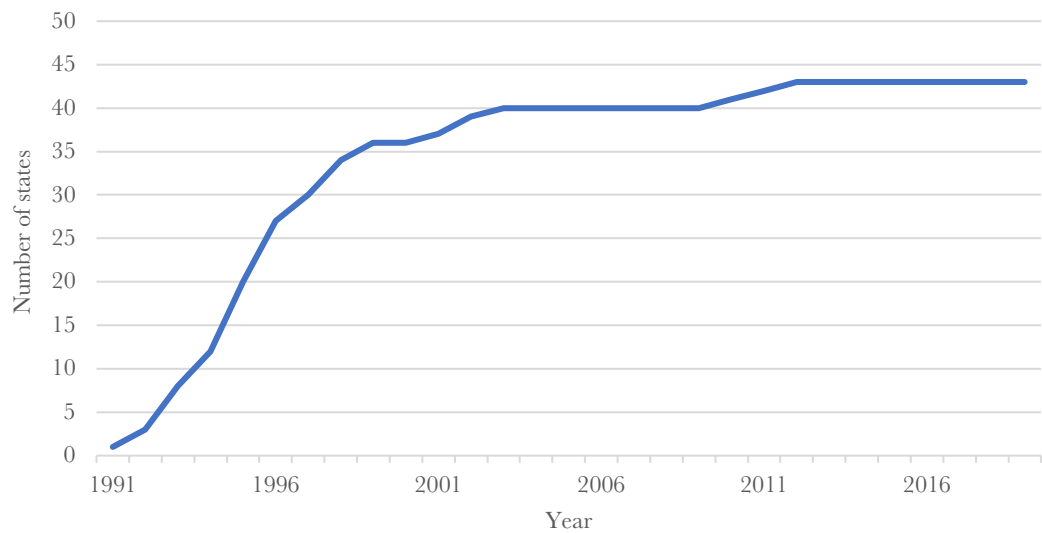
School Choice

Just as school accountability reforms proliferated throughout the 1990s and 2000s so too did state level reforms aimed at increasing school choice. Choice reforms aimed to improve the performance of the education system by empowering families – especially those from poor and minority backgrounds – to opt out district-run schools in favour of better performing, autonomously governed but publicly funded charter schools.

Between 1991 – when the first charter school law was passed in Minnesota – and 2001, 36 other states passed bills permitting the establishment of charter schools (see Figure 2, below). Yet despite the rush of legislation and bold rhetoric about expanded choice heralding a revolution in American education, by 2001 charter school enrolments made

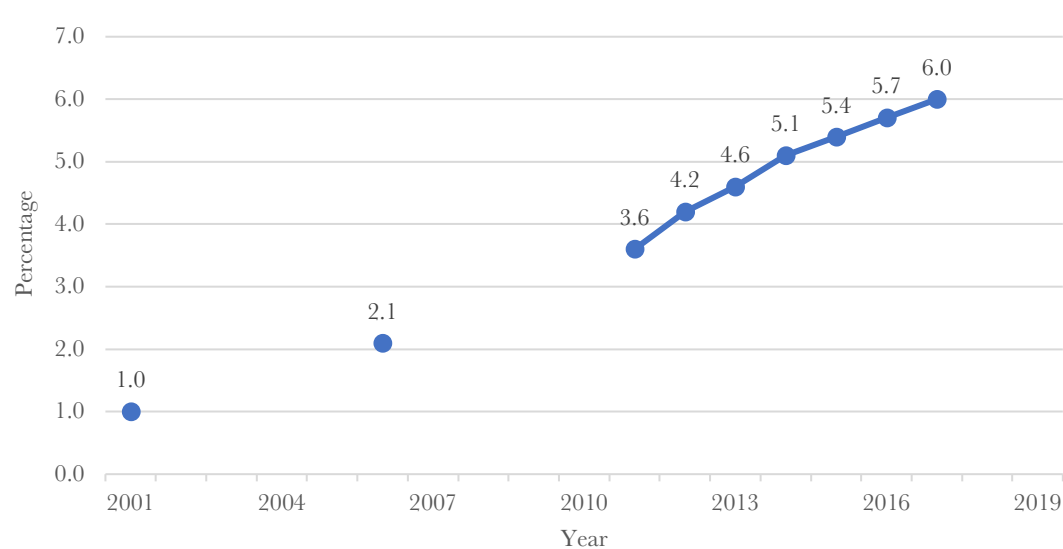
up only 1% percent of the national total (see Figure 3, below). What accounts for this anaemic rate of growth?

Figure 2: US states with laws permitting charter schools, 1991-2019



Source: National Alliance for Public Charter Schools (2019)

Figure 3: Charter school enrolments as a percentage of total K-12 enrolments, 2001-2016



Source: National Center for Education Statistics (2018)

One explanation lies with vested interests and obstructionism. In many states, even after the passage of charter school legislation, uncooperative bureaucracies, excessive

regulation, and hostile teachers unions, have stifled new entrants (Kirby, 2008). Several states, at the urging of teachers' unions, have caps on the number of charter schools that can be in operation at any one time. Consequently the charter sector is significantly smaller today than it would be if the size of the sector was simply a function of parental demand. Many of the leading charter networks have massive waitlists. For instance, only one in 17 applicants to Success Academies' 47 schools in New York City receives a place and yet efforts to expand the franchise have met with staunch resistance from Mayor Bill di Blasio and the United Federation of Teachers (Pondiscio, 2019).

But obstruction by vested interests is only part of the story. The choice reforms of the 1990s and early 2000s also failed to realise their revolutionary aims because there was no well-developed *supply-side* strategy to provide the entrepreneurs and innovators capable of taking advantage of new opportunities to develop different models. In their famous paean to school choice, *Politics, Markets, and America's Schools*, Chubb and Moe argued that 'choice is a self-contained reform with its own rationale and justification. It has the capacity all by itself to bring about the kind of transformation that, for years, reformers have been seeking to engineer in myriad ways' (1990, p. 217). But as Rick Hess correctly points out, 'suggestions that choice can serve as a self-contained remedy...overlook that choice is only half of the supply-and-demand market equation.' Policies that increase parental choice may create or empower *demand*, 'but typically do not address the supply side of quality options available' (2008b, p. 10).

The example of charter schooling in Minnesota is illustrative here. In 1991 an unlikely coalition of libertarian Republicans and Democrats concerned at the poor standard of minority-serving district schools made history by passing the first law to permit charter

schooling. But charter-schooling did not take off in Minnesota as its advocates hoped because there was no attendant strategy for supplying the people, money, and knowledge that charter organisations would need to stand themselves up and then withstand opposition from teachers unions and school districts threatened by charter expansion. Outside of teachers colleges, where charter schools were an object of suspicion, there was no pipeline of personnel; capital investments had no long-term financing; and there was no political organisation to lobby for charter-friendly regulation and state funding to support expansions. Hess analogises that early choice reforms were akin to ‘seeking to terraform an expanse of Siberian wasteland by sending two men equipped with a shovel, a map, and a bucket of water’; these attempts were ‘like a half-baked cake – a revolutionary development on the demand-side, but without an equivalent response on the supply side’ (Hess, 2008a, p. 229). As subsequent passages in this thesis detail, it was only with the growth and maturation of Teach for America and attendant human capital pipelines from the mid-00s onwards that expanded school choice started to significantly disrupt the K-12 landscape.

In sum, both the standards and school choice agendas made some headway in the 1990s and early 2000s, but the pace and scale of change and the general persistence of traditional structures frustrated reformers, underscoring the difficulty of remaking a highly devolved system, replete with veto points and powerful interests arrayed against significant change. Additionally, reformers in the early years faced a fundamental ‘supply-side’ problem. Legislation permitting charter schools created openings for change, but there was no well-developed strategy for developing the human capital capable and inclined to take advantage of these opportunities to innovate. As Hess notes, ‘the challenge in education is not simply to loosen regulation on an established

competitive marketplace but to summon new competitors to build from the ground up' (2008b, p. 11). The lack of 'supply' that had muffled the impact of 90s and early 00's reforms began to improve, however, towards the middle of the 2000s as human capital pipelines and early 'proof point' innovations began to grow rapidly and matured into a dense network of likeminded individuals and organisations.

Sources of Dynamism: The Emergence of a “Jurisdictional Challenge”

The major theoretical accounts and much of the empirical record since the early 1980s depict a system beholden at the local level to the occupational interests of teachers' unions and too large, diverse, and unwieldy to submit to meaningful rationalization and reform from higher levels of government, despite the best efforts of policymakers. Yet in the past decade plus, consequential changes *have* occurred and the *pace* and *scale* of change has grown. As Hess and Henig noted in 2015:

The American system of public education is more flexible, resilient, and responsive than many had come to believe. Beginning at least as early as the mid-1960s, critics from across the ideological spectrum had come to see the system – particularly large urban districts – as rigid, bureaucratic, interest group-infested bulwarks against any and all change. School districts in which half of students attend charter schools, value-added teacher evaluation, the Common Core: for better or worse, none of these seemed likely even a decade ago (2015, p. 191)

Even Terry Moe acknowledges that 'in recent years, there is a sense that reform has achieved lift off...the pace of reformist “victory” has picked up and the vested interests...have been losing more battles and making more concessions (2015, pp. 312–313). The inertial forces did not disappear, but to a notable degree, reformers have found a way to work around and within these constraints. A small but growing literature offers some insight into how entrenchment has been consequentially overcome, or at least undermined.

In the last two decades, a coalition of self-styled reformers has emerged within the American education system, mounting an ‘active challenge’ to a ‘long-standing cartel’ and ameliorating the ‘supply-side’ problems of education reform (Mehta & Teles, 2012, p. 9). This coalition is comprised of activists, funders, and entrepreneurs who have forged an alternate set of institutions and organisations that mirror and rival the existing public ones. Alongside the traditional district-administered public school system, an increasingly dense network of actors and organizations has arisen that runs its own schools; recruits its human capital from unconventional sources; trains teachers, principals, and superintendents in non-traditional ways; and provides new knowledge and technology to teachers, schools, and policymakers (Mcguinn, 2012a). In short, the American education system has entered a period of ‘jurisdictional competition’ (Mehta & Teles, 2012). The major dimensions of this competition and the key entities engaged in it are summarised in Table 2, below.

Table 2: ‘Jurisdictional Challenge’ in the American Education System		
Dimension of Production	Incumbents	Challengers
Schools	Regular district schools	Charter Schools
Teacher Training and Certification	Education schools	Alternative certification providers, including several charter management organisations
Principal and Superintendent Training	Education schools and public school districts	Charter schools and philanthropically-funded alt. cert. training organisations
Funding	Public revenue and ‘old philanthropists’ who support traditional structures	‘New’ philanthropists who invest in entrepreneurs and ‘disrupters’
Knowledge production	Education Faculties	Thinktanks; Economics Faculties
Policy Advocacy	Teachers’ unions	State and National-level policy advocacy organisations

Adapted from Mehta & Teles, 2012, p. 10;

Charter schools, and especially large charter networks, such as KIPP, Achievement First, and YESPrep now compete with traditional public schools to educate significant numbers of students, particularly in urban areas (see Table 3, below) (Ferrare & Setari, 2018; Kretchmar et al., 2014); Teach for America and allied organisations, such as the New Teacher project, have carved new pathways into the teaching profession, and with the advent of Teacher U and Relay Graduate School of Education, consortiums of charter schools have likewise devised their own alternatives to traditional education school training (Kretchmar et al., 2018); philanthropic entities and charter organisations have developed their own principal and superintendent training programs such as New Leaders for New Schools and the Broad Superintendent Academy; philanthropic foundations endowed by living donors, such as Gates, Broad, and Walton have invested heavily in econometric research to identify ‘what works’ with a view to scaling successful interventions (Reckhow & Tompkins-Stange, 2018); state-level reform advocacy organisations such as the PIE network¹², and national bodies such as the National Alliance for Public Charter Schools have corralled political support for challenger organisations and a broader program of reform (Finger, 2018c; McGuinn, 2012a); and a new breed of combative superintendents, epitomised by the likes of Michelle Rhee and Joel Klein, has aggressively overhauled schooling structures and practices in some of America’s largest cities (Brill, 2011; Mehta & Teles, 2012).

¹² The PIE (Policy Innovators in Education) network connects state-level education policy advocacy organisations. Members of the PIE network must subscribe to the following core policy pillars: i) Support for measurement-based system accountability for performance against high standards; ii) Belief that differentiation of teacher performance should be based in part on student growth; iii) Commitment to ensuring real, timely choices for families, including charters and other innovative options (PIE Network, 2019).

Table 3: Largest Number of Charter School Students By District, 2017-18				
District	<i>Charter Enrolment</i>	<i>District Enrolment</i>	<i>Total Enrolment</i>	<i>% Enrolment Share</i>
Los Angeles Unified School District, CA	163575	464457	628032	26
New York City Department of Education, NY	111805	961655	1073460	10
Miami-Dade County Public Schools, FL	65289	289226	354515	18
Philadelphia City School District, PA	64393	131238	195631	33
Chicago Public Schools, IL	58877	313671	372548	16
Houston Independent School District, TX	50479	194185	244664	21
Orleans Parish School District, LA	46932	2714	49646	95
Broward County School District, FL	46478	225793	272271	17
District of Columbia Public Schools, DC	43393	48135	91528	47
Detroit Public Schools Community District, MI	38667	44837	83504	46

Source: Hesla, K., White, J., Gerstenfeld, A. (2019) *A Growing Movement: America's Largest Charter Public School Communities*. Washington DC: National Alliance for Public Charter Schools; Total enrolment figures are calculated using 2017-18 NCES enrolment data

During the Obama era – and to a lesser degree throughout the Trump presidency, this growing coalition has attracted the attention and assistance of the federal government (Mcguinn, 2012b). Federal policymakers have welcomed the opportunity to empower a *new set of actors*, rather than emulating past administrations in ‘trying to induce an existing, often recalcitrant or simply uninterested set of agents to do [their] bidding.’ ‘The hope,’ observe Jal Mehta and Steve Teles, ‘is that these organisations will generate positive change closer to the ground through their own internal motivation and know-how, thus avoiding some of the familiar problems of the implementation chain’ (2012, p. 2). Mehta and Teles describe a number of ways that governments can aid and abet ‘jurisdictional challengers’. Through direct subsidy, adding or removing regulatory barriers, using the ‘bully pulpit’ to shape perceptions of moral legitimacy, and inviting challenger organisations or actors to become part of the state, governments can erode the dominance of incumbents and empower challengers (2012, pp. 5–8). But – at least in this instance – government did not play a significant role in the *initial development* of a challenger coalition.

In the establishment phases of the education reform movement, ‘the basic strategy and early political combat involved private and non-profit actors fighting dispersed battles across a wide range of domains, with little or no help from the government’. Later on, the federal government ‘jumped on a bandwagon that was not of its own making, but which it recognized had potential to serve its interests’ (Mehta & Teles, 2012, pp. 10–11).

How this ‘bandwagon’ got built and gained early momentum has not been subject to thorough scholarly inquiry, but Mehta and Teles sketch at least six factors that enabled the reform push to take off when it did. First, state level policy decisions in the 1980s and 90s to permit charter schools and alternative routes into teaching created openings for new entrants with potentially different ideas about school and system organisation. Second, having taken advantage of these openings, KIPP – one of the earliest charter school networks – succeeded in demonstrating that it was possible to educate poor and minority children to a much higher standard than anyone had expected. Third – and relatedly – the policy climate of the 90s and 00s placed a high premium on closing achievement gaps between advantaged and disadvantaged students. Fourth, the new breed of ‘venture philanthropists’ that emerged in the late 90s and early 2000s handsomely underwrote many entrepreneurial actors and organisations, especially those that promised to bring ‘structural change’ to the education system (Reckhow, 2013; Reckhow & Tompkins-Stange, 2018). Fifth, ample positive media coverage of KIPP and its ilk provided external validation and raised the profile of challenger entities with policymakers capable of abetting their push for greater ‘jurisdiction.’ Sixth, and most crucially in the estimations of Mehta and Teles, was the advent of Teach for America. TFA provided the element on which so many other organisations and entities in the

contemporary reform movement depended: ‘ideologically amenable human capital’ (2012, pp. 10–11).

TFA corps and alumni have been instrumental in establishing and sustaining many of the organisations and innovations that collectively comprise the current ‘jurisdictional challenge.’ For some years now, TFA’s outsized impact on the education system has been widely acknowledged in education policy circles (Mikuta & Wise, 2008; Wieder, 2012) and the mainstream media (Cersonsky, 2012; Mathews, 2007; Simon, 2013). Several scholarly monographs and edited volumes on the impact of recent philanthropic giving in K-12 education highlight TFA as a focus of investment because it was an early and indispensable source of agents for the reform movement (Hess & Henig, 2015; Quinn et al., 2014; Reckhow, 2013; Reckhow & Snyder, 2014; Tompkins-Stange, 2016). Other recent studies underscore TFA’s pronounced influence on the legitimisation and popularisation of alternative certification of teachers (Kretchmar et al., 2018; Russo, 2012); its central role in the establishment and expansion of the charter school sector (Kretchmar et al., 2014; Mathews, 2009); and the impact of TFA on the passage of reforms at the state level (Finger & Lastra Anadon, 2018). But quite *how* TFA developed from a shoe-string start-up in the 1990s into such an important driver of reform activity has not been thoroughly interrogated.

How did TFA manage to secure a foothold and subsequently thrive in a system dominated by vested interests largely hostile to the sorts of reforms that TFA has demonstrably catalysed? That the extant literature offers little by way of an answer to this question may well stem from the fact that scholars have been slow to conceive of TFA as something more than an alternate source of teaching labour. Given that TFA began life as a self-

avowed response to teacher shortages, it is perhaps unsurprising that the vast majority of scholarly analysis of Teach for America focusses on the effectiveness of TFA recruits as classroom teachers, and more generally, the effects of alternative certification programs like TFA on ‘teacher professionalism.’ As the ‘systemic’ impact of Teach for America has grown more and more evident in recent years, however, several scholars have endeavoured to analyse and – where possible – quantify the organisation’s broader influence on K-12 policies and structures. The following sections survey the academic literature on TFA, with particular attention afforded to more recent strands of analysis that conceptualise TFA as a producer of public goods and human capital for the education reform movement.

Scholarship on Teach for America

Teach for America as a Source of Teachers

TFA began life as an organisation that promised to fill gaps in schools that desperately needed teachers. In the early years, few argued that TFA teachers – drawn as they were from elite colleges – would not perform better than the likely alternatives: other untrained substitutes who were liable to be less educated and less motivated. The earliest critics argued, rather, that Teach for America measured up poorly to what was actually required. Linda Darling-Hammond, the most prominent of TFA’s initial detractors, contended that TFA neophytes were short-changing poor and minority students who most needed properly trained professionals committed to the teaching profession for the long term (Darling-Hammond, 1994). Over time, TFA has endeavoured to counter attacks of this nature by commissioning studies comparing the performance of TFA recruits to conventionally prepared teachers. A number of other independent studies

have also sought to verify Wendy Kopp's claim that 'TFA teachers do as well or better than teachers with traditional certification' (2008, p. 734).¹³

While Teach for America has only ever comprised a vanishingly small proportion of the total teacher workforce (never more than 0.2 percent), the impact of its teachers' on student learning has been exhaustively debated. Collectively, TFA impact evaluations 'represent a broad range of methodological rigor and standards for evidence' and the findings are mixed (Scott et al., 2016, p. 12). Meta-analyses of the more methodologically robust studies – those employing randomized control trials or quasi-experimental methods – do, however, find that the students of TFA teachers perform significantly better in mathematics, somewhat better in science, and no better or worse in English and social studies, than the students of conventionally prepared teachers (Institute of Education Sciences, 2016; Whitford et al., 2018). Notwithstanding these findings, because discrepancies among studies tend to 'hinge on abstruse matters of statistical methods,' 'there is little reason to expect any consensus on the question of relative effectiveness, or to expect test score data to quiet debate' (Glass, 2008a, p. 1).¹⁴

¹³ At the time of writing, the efficacy of TFA teachers has been assessed by three randomized control trials (M. A. Clark et al., 2015; Melissa A. Clark et al., 2013; Glazerman et al., 2006) and four quasi-experimental studies (Henry et al., 2014; Turner et al., 2012; Ware et al., 2011; Xu et al., 2011) that meet the U.S. Department of Education's standards for robustness (see Institute of Education Sciences (2017)). There is a plethora of less exacting analyses, including Boyd et al (2008) Darling-Hammond et al (2005), Kane, Rockoff, and Staiger (2008), Raymond et al (2001) and Laczko-Kerr and Berliner (2002) as well as at least one meta-analysis that draws no distinctions between the causal identification strategies of different studies (Heilig & Jez, 2010).

¹⁴ Studies speculate that the superior classroom performance of TFA teachers is due to the fact that TFA recruits tend to be more academically or cognitively able than conventionally recruited teachers. TFA draws its ranks from top graduates of elite colleges, whereas the broader US teacher workforce is typically drawn from the bottom third of the college going cohort (Auguste et al., 2010). Large-scale data analyses in the US and cross-nationally have shown that incoming teacher candidates' cognitive skills are positively related to future instructional quality as measured by student test scores (D'Agostino & Powers, 2009; Hanushek et al., 2019; Henry et al., 2014; Meroni et al., 2015). Relatedly, studies suggest that TFA teachers may possess deeper subject knowledge than their conventionally prepared counterparts – especially in science and mathematics, an attribute which is thought to be positively related to higher student attainment (Hill et al., 2005; Muijs & Reynolds, 2017). It has also been suggested that TFA teachers may attain superior student outcomes because the delimited nature of the program (a commitment of only two years) permits an uncommon devotion to the job – one that is reinforced very explicitly by TFA messaging and training.

An alternative arbiter of TFA participants' classroom effectiveness is the collective opinion of the principals who hire TFA teachers. Since the late 90s TFA has commissioned biannual independent surveys of principals in TFA partner schools. The results have been consistently broadly positive for TFA. In the most recent 2019 survey, nearly nine out of ten principals expressed satisfaction with the corps members at their schools, with a similar proportion reporting that they would recommend TFA corps members to other school leaders. 96 per cent of principals reported that the corps members at their school were better than or no different to other novice teachers (Westat, 2019). Another potential indicator of the long-run effectiveness of TFA participants as classroom teachers is the strong representation of TFA corps and alumni among state and national 'teacher of the year' awardees¹⁵ and as recipients of the Ryan Award. The Ryan Award is made by the Accelerate Institute, a Chicago Based foundation devoted to closing the achievement gap between poor, predominantly minority students, and their richer predominantly white peers. The Prize recognises two 'high-impact urban school leaders who accelerate student achievement.' At least one TFA alumna/us has received the award every year since it was first given in 2013 (Accelerate Institute, 2019).

As Kim Smith, a founding TFA staff member observes: 'if you haven't necessarily committed for your full career, it's almost like if you think about it like running a marathon. If you know you're in it for the marathon I think people pace themselves differently. But if you're like 'look I'm going to do this for two, three, four, five years, before I do something else,' you're probably giving everything you have' (*Interview*, 2017). Finally, TFA promotes a more didactic or 'explicit' form of pedagogy than is typically inculcated at many US schools of education, where more constructivist, student-centred modes of teaching tend to be favoured (Farr et al., 2010; Kretchmar et al., 2018; Labaree, 2004). There is considerable evidence that, all else equal, explicit teacher-led instruction results in superior student learning outcomes than constructivist, student-centered, 'discovery-based learning' (Clark et al., 2012; Mayer, 2004).

¹⁵ According to Teach for America, over 1000 Teach for America alumni and corps members have been named Teacher of the Year in their states, districts and schools. In 2019, half of the finalists for the Council of Chief State School Officers National Teacher of Year Award were TFA alumni (Teach for America, 2019c, 2019g).

In addition to classroom effectiveness, other studies of TFA teachers have found that TFA recruits tend to be more diverse than the profession at large. For instance in 2015, 20 percent of the TFA cohort were African American (as opposed to 7 percent of the teaching profession overall) and 14 percent of the corps were Latino/Hispanic (as opposed to 9 percent of the teaching profession at large) (National Center for Education Statistics, 2018a; Teach for America, 2015a). All else equal, students from minority backgrounds perform better when taught by a teacher who shares their characteristics (Gershenson et al., 2018). But while TFA recruits inject much needed diversity to the profession, they tend to turnover at higher rates than the profession at large. Around half of all new teachers in urban schools will move on after four years. Among TFA participants, only a third remain in any classroom after four years, and of those who do continue teaching, 85 percent leave their original schools for less difficult assignment (Donaldson & Johnson, 2011). Critics of TFA point to research documenting the deleterious effects of high teacher turnover on student outcomes (Ronfeldt et al., 2013).

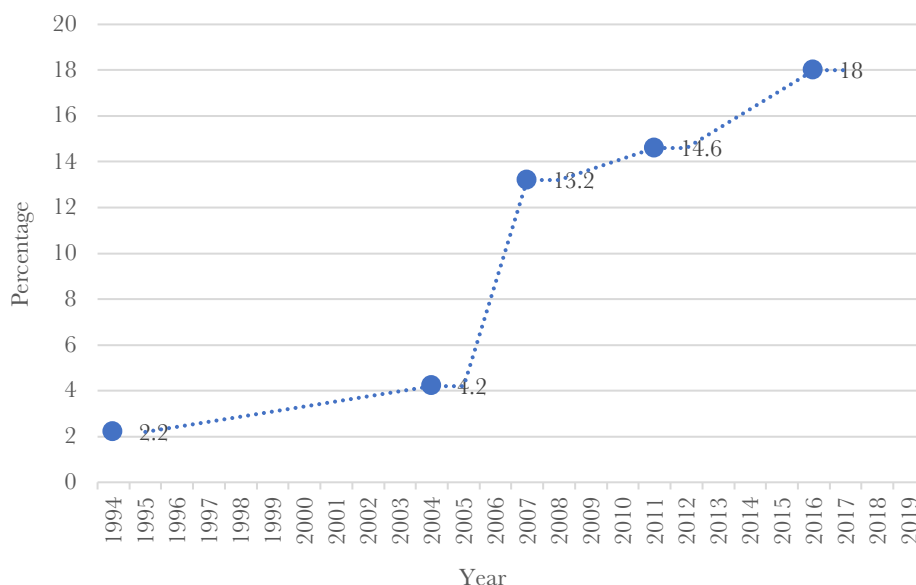
Teach for America and the Teaching Profession

Of course, the ferocity of advocacy for and against Teach for America, has always turned on much more than narrowly drawn questions of TFA teachers' classroom efficacy. From the outset, TFA was a highly prominent example of an alternative approach to teacher education and quickly became a lightning rod for ongoing debates over how teachers should be selected, trained, and certified. As education academic Gene Glass observes, 'TFA is an ideological banner: it represents the extreme case of what members of certain camps believe, namely that finding the best teachers requires little more than locating high-IQ liberal arts graduates with extensive subject matter knowledge and providing them with a brief summer training course in how to be a teacher' (2008a, p. 5). For many

policymakers throughout the 1990s and 2000s, TFA was embodied ‘proof’ that alternative pathways *could* produce effective educators. To their minds, TFA showed that regulations mandating the possession of an education degree and other demands of the ‘professionalisation’ agenda were simply manifestations of rent seeking by a discredited education establishment (Mehta, 2013).

Traditionally, teachers were drawn from the ranks of those who had completed a university or college teacher education degree (most commonly, a 4-year bachelor of education) and thereby became eligible for a state teaching license or certificate. Beginning in the 1980s, several states created alternative pathways to state certification for degree holders in disciplines other than education. These alternative certification schemes typically involved a highly abbreviated training course, requiring significantly less time to complete than traditional pre-service teacher training programs (Glass, 2008a). In recent decades, alternative certification schemes have gained considerable market share from traditional campus-based teacher education, much to the chagrin of certain traditional teacher educators and advocates for teacher ‘professionalism’ (see Figure 4, below).

Figure 4: Percentage of Teachers who report that they entered teaching through an alternative certification program, 1994-2016



Sources: NCES (2017) *Digest of Education Statistics 2017*, Table 209.24; Glass (2008a)

Teachers and teacher educators have long lamented that teaching does not enjoy the same status and remuneration as other fully-fledged professions, such as medicine and the law. As Mehta argues, true professions have three characteristics that are absent or not fully realised in education: i) a codified body of knowledge that all practitioners are expected to possess; ii) ‘social closure’, namely that the profession defines and determines who can become a certified practitioner and licenses providers of training; and iii) common norms and standards of practice that ensure that practitioners meet the standards of the field (such as hospital rounds in medicine and peer review in higher education). Teaching – like social work, childcare, and other highly feminised fields – does not fully possess these characteristics (2013, p. 24). For decades, teacher educators such as Linda Darling-Hammond (1994; 2005) have pushed for higher barriers to entry and a more codified body of knowledge under the banner of a professionalisation agenda. For their part, teachers unions have generally argued that their members ought to be accorded the *status* and *benefits* of professionals, yet they have largely resisted the robust

performance standards and accountability systems that distinguish true professions (Mehta, 2013).¹⁶

By promoting the notion that short and intensive training was adequate classroom preparation and that teaching could be treated as a 2-year commitment rather than a long-term professional career, Teach for America has drawn the ire of professionalisation advocates (Darling-Hammond, 1994; Kretchmar et al., 2018; Veltri, 2010). ‘Many educators find the structure of Teach for America’s training ludicrous’ wrote Carleton College Professor of Education, Deborah Appleman, when TFA was first announced in 1990. ‘What would lawyers or doctors think about proposals to train young and eager would-be professionals for a summer, give them a guaranteed job for two years, and then teach them law or medicine as they practiced it?’ (1990, p. 121). By way of an answer, Diane Ravitch holds that ‘no other profession would admire and reward a program that replenished its ranks with untrained people who expected to move on to a new career in a few years’ (2014, p. 143). Over time, it is not just the brevity of TFA training that has riled the education establishment, but its content and orientation too. TFA’s training is geared largely towards the *practice* of classroom instruction, with little emphasis on pedagogical theory or the history and sociology of education. This approach has been criticised by votaries of traditional teacher training as overly ‘technocratic’ and ‘behaviourist,’ ‘over-reliant on direct rather than student-centred instruction’ and

¹⁶ Significantly, long-time AFT president Albert Shanker broke ranks with many in the union movement by arguing that the teaching profession needed to take more responsibility for upholding high standards of competency if it wanted to attract talented undergraduates and increase its status, power, and prestige. In 1985, Shanker told the Niagara Falls teacher convention that: ‘unless we go beyond collective bargaining to teacher professionalism we will fail in our major objectives.’ His speech went on to propose a national examination to limit entry into teaching; a system that would allow students to choose the schools they attended so that they would no longer be ‘captive clients’; impartial panels of experienced teachers to evaluate teachers accused of incompetence; and a restructuring of education to encourage bright people to enter teaching even if they only intended to remain for five or six years (Maeroff, 1985).

‘myopically focussed on tested material at the exclusion of all other content’ (Golann, 2015; Kretchmar et al., 2018, p. 17; Sondel, 2015, 2016). Stitzlein and West’s (2014) denunciation, typifies this critique:

Teachers [in TFA-type programs] are trained as workers who carry out specific sets of practices largely predetermined by others. Unlike professionals, they are prepared to produce a product without understanding why, how, or even if it should be produced in the first place. p.9

Throughout the late 80s and into the ‘00s, leading advocates for alternative certification such as the Fordham Foundation, the National Council on Teach Quality, and the Progressive Policy Institute, argued that there is no evidence that higher standards for credentialing would boost student learning, and furthermore, that handing more gatekeeping power to teachers and education schools would simply concentrate authority in the hands of precisely the entities responsible for the educational malaise diagnosed in *A Nation At Risk* (Mehta, 2013). Far from raising standards – ‘every additional requirement for prospective teachers – every pedagogical course, every new hoop or hurdle’ would, in their view, have the predictable effect of ‘limiting the potential supply of teachers by narrowing the pipeline while having no bearing whatever on the quality or effectiveness of those in the pipeline.’ Teach for America was a potent fillip to their arguments: ‘the popularity of such programs...indicates that the prospect of teaching without first being obliged to spend years in pedagogical study appeals to some of our brightest college graduates’ (Thomas B Fordham Foundation, 1999, p. 10).

As TFA expanded, scholars and activists increasingly lamented the fact that TFA’s approach to teacher recruitment and preparation implicitly undermined not just professionalisation, but also the traditional collective bargaining positions of teacher unions – namely that formal credentials and years in the job should entitle a teacher to secure tenure and higher pay (Kumashiro, 2012; Pitzer, 2010). TFA was premised on the

idea that traditional credentials are not a reliable proxy for classroom competence (Kopp, 1992), and to a significant degree, the performance of TFA's teachers has shown this to be true. Moreover, TFA holds that even in the most challenging social settings, teachers are ultimately responsible for the learning outcomes of students (Farr et al., 2010). Recent research by Conn, Lovison and Mo (2019) finds that TFA is very successful in inculcating this conviction among its participants.¹⁷ By implication then, TFA promoted the idea that teachers should be retained and rewarded according to how effectively they help their students to learn and not according to how long they have been in the job – or indeed, how long they intend to stay (DiCarlo, 2012). By its very essence, TFA thus undermines lock-step compensation and iron clad tenure. Consequently TFA is charged with 'lowering wages, reducing benefits and worsening the working conditions of teachers' (Sommer, 2014). In sum, TFA marked a radical departure from traditional approaches to teacher preparation, undermined arguments for further professionalisation, and challenged the long-established norms and bargaining positions of teachers unions, as Table 4 below summarises.

¹⁷ Conn, Lovison and Mo (2019) surveyed applicants for the 2007-15 cohorts of Teach for America to assess how the TFA experience affects participants beliefs about education policy and reform. The authors compare the opinions of applicants who went on to complete the TFA program with those who were narrowly rejected in the final rounds of selection in order to isolate the impact of TFA participation. This identification strategy assumes that successful and just-rejected applicants would hold similar incoming beliefs. At the end of their 2-year assignments, TFA participants recorded significantly higher degrees of agreement than just-rejected non-participants with the following statements: that 'it is possible for all children in the US to attain an excellent education,' that 'if teachers try hard, they can get through to difficult students' and that 'student intelligence is malleable.' Similarly, TFA participants were significantly less likely than non-participants to agree with the statement 'teachers can only do so much to help low-income students achieve.'

Table 4: Traditional teacher preparation and professionalism versus the Teach for America model

	Traditional	Teach For America
Training provider	Education department of a (usually public) university	Teach for America (in more recent years, supplemented by courses from traditional providers)
Type of training	4 year B.Ed or 2 year M. Ed.; Course content is primarily theoretical. Some 'in-school' practical component. Little classroom autonomy until degree is completed (Levine, 2006).	Vocational on-the-job model of training over two years, with short, intensive periods of coursework; course content is practically oriented. TFA-teachers have sole responsibility for managing a classroom within six weeks of commencing the program (Levine, 2006).
Ideal teacher	Spends a career in the classroom; Need not be academically exceptional – devotion to the job and rapport with students, and critical understanding of socio-educational setting more important.	'Exceptional,' performance-oriented individual, determined to raise academic outcomes, irrespective of socio-economic context; need not envisage a career in the classroom – indeed TFA actively cultivates 'leaders' in much broader spheres.
Broader societal role of the teacher	Teachers can make a difference, but rarely a significant one, in the absence of extensive social programs to mitigate the effects of poverty and other structural disadvantages (Ravitch, 2012). Teachers should not be held responsible for poor outcomes in difficult social settings.	Teachers are ultimately responsible for student success or failure, irrespective of the broader social or structural context (Farr et al., 2010). 'We don't have to wait to fix poverty to dramatically improve educational outcomes for underprivileged students.' (Kopp, 2012)
Criteria for Career Progression	Salary structure and tenure conditions should accord the greatest rewards to the most experienced and formally credentialled teachers.	Teachers should be rewarded according to demonstrable contributions to student learning. Tenure and higher compensation should not be assured without demonstrated high performance.

Teach for America and The Expansion of Alternative Certification

TFA is more than a potent symbol in debates over teacher preparation and professionalism, however. Through concerted lobbying and direct action TFA has actively abetted the growth of the alternative certification at large. In the mid-1990s TFA incubated and spun-off the New Teacher Project – a major alternative certification provider for large urban districts, and TFA alumni have been instrumental in developing charter school-based alternative certification pathways, such as Teacher U (a collaboration between Uncommon Schools, KIPP, and Achievement First charter

networks) and RELAY Graduate school of education (Carey, 2009; Kretchmar et al., 2018). Moreover, TFA has been instrumental in preserving favourable federal regulations for the alternative certification sector at large. As Alexander Russo's (2012) well-sourced study reveals, TFA made a decisive intervention during the drafting of the *No Child Left Behind Act* to ensure that alternatively certified individuals would be covered by the Act's definition of a 'highly qualified teacher.' This 'awkward loophole' in NCLB was fiercely opposed by a coalition of civil rights groups and teachers unions who worried that low-income and minority students would suffer under-prepared and ineffective teachers (Russo, 2012; Zeichner, 2013). But TFA's bipartisan allies on Capitol Hill have rebuffed several efforts to amend the law over the years (Kretchmar et al., 2018; Simon, 2013). The upshot of this activity has been an 'explosion' in the alternative certification programs (including online and for-profit ones) of highly variable quality (Russo, 2012).

Teach for America as a driver of 'systemic' change

Beyond its direct impact on students and the teaching profession, analyses of Teach for America's broader influence are scarcer. Of these, most skew towards denunciations of TFA as a 'key mediator of neoliberal policy activities' (Scott et al., 2016, p. 1) (Fisher-Ari et al., 2017; Kretchmar, 2014; Kretchmar et al., 2014; Kumashiro, 2010; Lefebvre & Thomas, 2017; Sommer, 2014). There is also a handful of more dispassionate efforts to identify, and where possible, quantify the array of changes in policy, practices, and structures that plausibly can be ascribed to the organisation and its alumni (Finger & Lastra Anadon, 2018; Higgins, Robison, Weiner, & Hess, 2011; Russo, 2012). This emerging body of scholarship is important for its recognition of the fact that 'TFA's greatest point of influence in public education is not in classrooms,' but its 'infusion of policy entrepreneurs into educational policymaking processes' and its 'cultivation of powerful networks' (Scott, Trujillio & Rivera, 2016, p. 2). In short, this literature provides

a new understanding of Teach for America as a provider of ‘public goods’ for the education reform movement.

A synthesis of recent scholarship reveals that TFA performs this function in three ways. First, it *recruits* young people who identify with TFA’s ‘movement to end educational inequality.’ During initial training, recruits are initiated into a particular mindset. TFA corps are encouraged to believe that even in the most inauspicious settings effective teaching can be transformative; that effective teaching can be reduced to a set of codified and transferrable skills that can be mastered with dedicated practice; that data should inform all practice; that nothing short of a ‘relentless pursuit’ of better outcomes is satisfactory; and that the American education system requires urgent improvement (Farr et al., 2010; Foote, 2008; Fryer & Dobbie, 2015; Jacobsen et al., 2016; Mo & Conn, 2018; A. Smith, 2005).

Second, TFA invests in the *human capital* of the reform movement by placing its corps members at the very heart of the education system. TFA participants experience first-hand the realities of struggling schools and in many cases develop a deep passion and sense of ‘urgency’ about the need for reform (Jacobsen et al., 2016; A. Smith, 2005). During their two-year stints, TFA participants glean important insights into the opportunities for and impediments to systemic change (Foote, 2008). Moreover, experience in difficult schools affords TFA alumni a certain amount credibility and authenticity when they advocate for policy change and take on more senior roles in the education sector, as many do (M. Higgins et al., 2011). Brewer and DeMarrais refer to this phenomenon as ‘manufactured expertise’ (2015).

Third, and perhaps most importantly, Teach for America provides *social capital* through the networks that develop via the TFA experience (Labaree, 2010). TFA is an intense and challenging experience for many, and it encourages the formation of strong and enduring bonds among participants (Foote, 2008). It is important to note that while the TFA organisation very deliberately cultivates close ties among alumni – by facilitating the exchange of ideas, avenues for activism, job opportunities and so on – it does not *direct* or *coordinate* alumni activity. Indeed, TFA’s leadership has generally avoided taking explicit positions on contentious questions of education policy for reasons discussed at length in ensuing chapters (Russo, 2012). Instead, TFA *facilitates* alumni action and encourages other reform organisations to harvest the fruits of its labours. Charter organisations, think tanks, policy advocacy groups, other alternative certification providers, and pro-reform politicians have all taken considerable advantage of the network and resources that TFA has introduced into the education system. Subsequent chapters of this dissertation provide a richer picture of *how* TFA’s pipeline of human capital has catalysed consequential shifts. At this juncture, a succinct summary of the ‘*what*’ – what changes in structures and practices has TFA enabled and with what consequences? – is most germane.

TFA and Educational Entrepreneurship

One of the earliest analyses of the impact of TFA beyond the classroom was a 2011 study led by Heather Higgins which polled education sector experts for their opinions on the most innovative and impactful organisations or initiatives in K-12 education. The ensuing list amounts to a roll call of the leading ‘jurisdictional challengers’ to the traditional system of district run schooling. The authors use this list as a ‘denominator’ by which to measure the presence of TFA staffers and alumni among the most

consequential innovators in K-12 education. Examining the work histories of the 71 founders and co-founders the top 50 organisations, the authors found that one in seven was a TFA alumnus/alumna. A formative association with TFA was, by some margin, the most common element in the work histories of education sector entrepreneurs – ahead of much larger entities like the San Francisco, Newark, and Chicago Public School Districts, AmeriCorps, the White House Fellows program, McKinsey and Co. and the US Department of Education (Higgins et al., 2011, p. 22). Some of the TFA-founded organisations on the list include the KIPP, IDEA, and YES Prep charter networks; fundraising models like the New Schools Venture Fund; and alternative recruitment and training entities such as Teacher U, the New Teacher Project, and New Leaders for New Schools. TFA was likewise the most prolific source of contemporary organisational leadership. In 2011, fourteen of the fifty listed organisations had a top management team member with a TFA background. After New York City Public Schools, the next most prolific spawner of organisational leaders was the KIPP network, founded in 1994 by the then TFA corps members Dave Levin and Mike Feinberg.

TFA and Charter Schooling

Several studies have underscored the important role of TFA in the development and growth of the charter school sector. TFA has been a powerful ally and driver of charter schooling in two key respects. First, as Higgins *et al* document, TFA alumni have founded and led some of the oldest, largest, and most academically successful charter networks across the country (M. Higgins et al., 2011; Kretchmar, 2014; Kretchmar et al., 2014; Mungal, 2016). The KIPP network, in particular, has attracted considerable attention and scrutiny over the years, because it was the first charter management organisation that could plausibly claim to have systematised and scaled the provision of a significantly

superior education to poor and minority students (Mehta & Teles, 2012; Reckhow, 2013)¹⁸. Without these successes to point to, it is hard to imagine that so many policymakers throughout the 2000s (especially Democrats traditionally allied to the teachers' unions) would have championed the continued expansion of charter schooling in the teeth of union led opposition (Brill, 2011).

Second, TFA corps and alumni have been a significant source of personnel for the charter movement at large. From the mid-2000s onwards, TFA dramatically increased the number of corps members it placed in charter schools as major charter networks rapidly expanded to meet unmet demand in some of America's largest urban districts, such as Los Angeles, New York, and Chicago (Blume, 2011; Goldstein, 2015; Sommer, 2014). Throughout the 2000s many major charter networks developed formal contracts with TFA, guaranteeing the supply of a certain number of corps members every year (Kretchmar et al., 2014). To the best of my knowledge, no study precisely quantifies the proportion of charter school personnel drawn from TFA's ranks, but several studies assert that TFA has been 'central' and 'indispensable' to the nation-wide growth of the charter sector in recent years (Peterson, 2015; Ravitch, 2014, p. 140). Kretchmar, Sondel, and

¹⁸ The effectiveness of KIPP schools at raising academic attainment has been the subject of several econometric evaluations (Angrist et al., 2011; Hoxby & Murarka, 2007; Nichols-Barrer et al., 2016; Roland G. Fryer, 2014; Tuttle et al., 2010); abundant media coverage; and an entire monograph by the veteran *Washington Post* educational reporter Jay Mathews (2009). KIPP pioneered a 'no-excuses' model of schooling, the hallmarks of which are an extended school day and year, very strict standards of behaviour, and a relentless focus on test-based attainment. Several other major CMOs have emulated this general approach. Educationalists charge that 'no excuses' pedagogy is insufficiently sensitive to individual and cultural differences; diminishes opportunities to develop critical thinking skills; and impoverishes relationships between teachers and students (Lipman, 2004, 2011; McNeil, 2000; Valenzuela, 2005). More generally, charter schools are denounced as an instrument of 'privatisation agenda' that promotes choice, competition, and deregulation as solutions for urban education (Apple, 2006). By contrast, throughout the past couple of decades, many politicians and policymakers have celebrated KIPP and its ilk for realizing the promise of charter schooling: namely, that greater principal autonomy to select and manage staff and other resources could create schools and school systems that delivered significantly better student outcomes than the traditional district-run alternative.

Ferrare's social network analysis, for instance, identifies Teach for America as a 'central node in the network promoting the growth of charter schools' (2014, p. 742).

TFA and Policy Advocacy

Leslie Finger and Carlos Lastra Anadon's (2018) analysis of TFA's influence on state-level education policymaking from 1990 to 2013 corroborates Kretchmar *et al's* findings. Offering by far the most methodologically sophisticated and comprehensive study of TFA's 'systemic' effects to date, Finger and Lastra Anadon show that, *ceteris parabus* the presence of a Teach for America corps in a given state heightens the likelihood of legislation promoting the introduction or expansion of charter schooling. TFA is also correlated with policies enabling private school choice (such as voucher schemes) extending the number of compulsory education years, consequential school accountability prior to *No Child Left Behind*, tenure repeal, performance pay, the introduction of high school exit exams, and increases in spending per pupil (2018, pp. 3–4). Survival models indicate that the introduction of TFA significantly precedes other reforms, suggesting that TFA is an independent *driver* of change, and not merely a manifestation of a bigger wave of reform. The authors illustrate the mechanism of change by showing that TFA is statistically related to higher incidences of state-level education reform advocacy groups. They offer survey evidence that significant proportions of TFA corps members go into advocacy within the region of their initial teaching assignment, and found advocacy organisations that in turn recruit from TFA corps members.

Several other studies offer corroborating evidence for Finger and Lastra Anadon's hypothesised mechanism. Drawing on surveys of TFA participants and conversations with TFA staff, Jacobsen, White and Reckhow (2016) detail the ways in which TFA

encourages and facilitates it corps members and alumni to become involved in advocacy, policymaking, and electoral politics. They accord particular importance to the TFA spin-off organisation, Leaders for Educational Equity (LEE). Founded in 2007, LEE exists to connect TFA corps members and alumni with job opportunities in policy advocacy, and grooms candidates to run for elected office or secure decision-making power through board appointments or other public service roles. A recent paper by Mo *et al* suggests that participation in TFA – ‘a strong treatment of both exposure to public policy problems and integration into supportive networks’ – causes women to be more politically ambitious, with particularly pronounced effects for women of colour (Mo et al., 2019a, p. 867).¹⁹

The ‘ubiquity’ of TFA alumni ‘at all levels of education policy and practice nationwide’ has been extensively canvassed in the media and scholarly literature past decade or so (Conn et al., 2019). As *Politico* reporter Stephanie Simon related in 2013:

TFA has already produced an astounding number of alumni who have transformed the education landscape in states from Tennessee to Texas by opening public schools to competition from private entrepreneurs; rating teachers in part on their ability to raise student test scores; and pressing to eliminate tenure and seniority-based job protections (Simon, 2013).

In recent years, TFA alumni have spearheaded aggressive reform efforts as superintendents of major school districts, such as Newark, Washington D.C., Camden, New Orleans, and Memphis, and as state legislators in Colorado and North Carolina. TFA alumni are currently state superintendents of education or commissioners of education in the District of Columbia, Iowa, Louisiana, New Mexico, North Carolina,

¹⁹ Mo *et al* (2019a) employ a fuzzy regression discontinuity design on an original survey of over 32,000 TFA applicants and TFA’s selection data for the 2007-2015 application cycles. The authors find that compared with similarly ranked female applicants who did not participate in TFA, women who completed TFA express a significantly higher interest in running for office and participating in political campaigns.

Massachusetts, Tennessee, and Rhode Island (Conn et al., 2019; Teach for America, 2019c).

The leaders of TFA and LEE are adamant that neither entity encourages alumni to adopt a particular ideology or set of policy positions. ‘We have absolutely no agenda for LEE... we don’t have political goals, we don’t have an ideology’ insisted LEE’s founder, Jen Bluestein Lamb in 2010 (Miner, 2010). And it is true that TFA alumni hold diverse opinions. For instance, the current head of the militant Los Angeles teachers union, Alex Caputo Pearl, is a TFA alumnus and vehement critic of charter schooling and merit pay among other favoured causes of the reform movement. Nonetheless, it is also true that the *majority* of TFA alumni who have attained prominence in the education system have used their elected or appointed positions to advance policies centred around greater school choice (usually in the form of charters) and tougher evaluations for teachers with consequential performance-based rewards and sanctions. Moreover, these policy positions are wholly consistent – and indeed logically follow – from TFA’s declared intention to ‘pursue ambitious meaningful outcomes’ based on ‘data-informed decisions’ (Teach for America, 2019d). As alumnus-cum-critic Jamieson Brewer observed in 2015, ‘TFA has in its 25 years of existence, transformed from an organization that began from a perceived need to ameliorate a national teacher shortage to an organisation that....[produces] alumni who are interested in facilitating neoliberal education reform through elected political positions’ (Brewer & DeMarrais, 2015). In sum, TFA is now widely recognised in the academic and popular literature as an important driver of consequential shifts in the contemporary education system. Though TFA’s various dimensions of impact defy comprehensive quantification, a synthesis of the available

evidence points to a profound influence. Table 5 below provides a summary of TFA's impact within the broader context of the reform movement at large.

Table 5: The Multi-Dimensional Impact of Teach for America					
Dimension of Production	<i>Incumbents</i>	<i>Incumbent Logic</i>	<i>Challengers</i>	<i>Challenger Logic</i>	<i>Role of TFA in forging challenge</i>
Teacher Training and Certification	Education schools	New teachers should have a qualification from an education school; teachers ought to be steeped in socio-cultural theory of education; pedagogical approach must reflect complexities of whole child, social and demographic context, etc.	Alternative certification pathways (e.g. TFA; RELAY Graduate School of Education; Teacher U)	Technocratic; behaviourist; new teachers need very practical skills in classroom management; lesson planning; data collection and analysis; good teaching is codifiable and can be transformative	• TFA pioneered and popularised alternative certification.; TFA alums have founded many other large and prominent alt. cert. providers • TFA ‘almost single-handedly’ preserved regulatory flexibility for entire alternative certification sector in wake of No Child Left Behind (Russo, 2012) • Alt cert has grown by nearly 330% between the 2004-05 and 17-18 school years (NCES, 2018)
Principal and Superintendent Recruitment and Training	Education schools; district professional development; oftentimes nothing	School leaders should be drawn from ranks of most senior career teachers as they are steeped in the culture of the system	Alternative pathways (e.g. New Leaders for New Schools; Broad Superintendents Academy; Education Pioneers)	Excellent school leaders may be found in all walks of life; use econometric techniques to isolate hallmarks of effective leaders; recruit and train new leaders from a variety of backgrounds	• TFA alumni founded New Leaders for New Schools, a significant source of principals for the charter sector and reforming districts • Several TFA-founded charter networks have expanded into principal training
System Administration	Traditional Superintendents; State Education Commissioners	Prioritise harmony among system stakeholders; favour traditional district model of schooling; generally advance through the traditional system	Disruptive system leaders, often enter education system from non-traditional pathways (e.g. from outside education, or through alternative certification)	System needs a shake-up; system is serving the interests of the adults more than the kids etc.; place low priority on harmony among key stakeholders; pit themselves against ‘vested interests’	• TFA has produced a plethora of hard-charging superintendents and system leaders, such as Michelle Rhee, John White, Cami Anderson, and Kevin Huffman
Schools	Traditional District-Administered Schools	Many decisions about day to day running of schools, such as hiring of teachers, teacher evaluation and compensation	Charter Schools (e.g. KIPP, Achievement First, IDEA; Success Academy);	Decisions about day-to-day running of schools devolved to school level; principals have autonomy to extend school hours;	• TFA alumni have founded the largest and most prominent charter networks, such as

		centralised to district level, standardised across the system and subject to collective bargaining with teacher unions; Students attend neighbourhood schools		hire and fire staff; parents should be empowered to choose the school that serves their child's needs best	KIPP, YES prep, IDEA, and Rocket Ship The high-performing charter sector relies on TFA heavily for human capital
Funding	Public revenue; supplemented with 'old philanthropy' (e.g. Annenberg, Ford, Carnegie, Kellogg)	System primarily needs more resources. Resources must be equalized in order to realise better outcomes	'New edu-philanthropists' Gates, Broad, Walton, Robertson foundations	System needs new and differently minded agents to realise better outcomes; resources should be focused on drivers of structural change	- TFA a 'darling' of 'new edu-philanthropists' (Reckhow, 2013; Tompkins-Stange, 2016) - Many program officers at big foundations are TFA alums (M. Higgins et al., 2011)
Knowledge Production	Academic Researchers in Education Faculties	Critical theory, sociological paradigm; unequal education outcomes reflect deep structural inequalities in American society; system can only meaningfully improve if these fundamental inequalities are resolved.	Academic economists such as Rik Hanushek and Caroline Hoxby; Reform-aligned Think Tanks, such as Thomas Fordham Institute, New Teacher Project; American Enterprise Institute; Brookings Institute	Econometric impact evaluation; focus on 'what works' to get better outcomes; isolate school-based interventions that can improve outcomes without massive social change	- TFA incubated and spun-off the New Teacher Project – an influential voice in policy debates; - Many staff at pro-reform think tanks are TFA alums (Conn et al., 2019; M. Higgins et al., 2011).
Policy Advocacy	Teachers' Unions	What is good for teachers is good for students; more resources, more professional autonomy and greater job protections for teachers will improve outcomes for students	Reform advocacy groups (e.g. PIE network; Students First; 50CAN; Educators for Excellence); Elected officials with front-line experiences and preferences for reform (e.g. Democrats for Education Reform; Leadership for Educational Equity)	Interests of teachers and interests of students are sometimes in conflict; More choice and competition among providers; more accountability for teachers and schools will create a system that better serves students	- TFA has had independent and significant effect on state-level policy; Presence of TFA = more education reform (L. Finger & Lastra Anadon, 2018) - TFA alumni heavily represented in upper echelons of state and national policy reform groups - TFA alumni founded Students First and Educators 4 Excellence – two prominent state level advocacy groups

Conclusion: Stasis and Dynamism in a Sticky System

The story of US education policy in recent decades is one of substantially frustrated top-down reform efforts, but considerable dynamism on the ground in spite of this fact. To understand how reform has made consequential, if not comprehensive, headway in recent times, we need to focus on the largely bottom-up activities of a loose coalition of activists, funders, and entrepreneurs whose collective efforts have forged an effective ‘jurisdictional challenge’ to the traditional providers and powerholders in American education. In seeking to understand the formation and effectiveness of this reform coalition, our attention is ineluctably drawn to the outsized and integral role of Teach for America as a vital source of human capital.

To a significant degree the ‘jurisdictional challengers’ identified in recent scholarship have found a way to work around the inertial forces that have stymied top-down rationalisation. Whereas the highly devolved nature of the American education system creates a multitude of ‘veto’ and ‘clearing’ points that must be overcome by top-down reformers, for front-line, bottom-up change-agents, the multiplicity of venues provides opportunities. As Baumgartner and Jones note, ‘the very existence of multiple venues means that cracks are likely to appear somewhere, and these can be exploited by political activists’ to gain a foothold from which change may spread (1993, p. 234). In other words, the contemporary reform movement made early progress by *exploiting* rather than chafing against the disaggregation and diversity of the US education system.

Similarly, given that so much failed reform of the past few decades can be attributed to the limited abilities of reforming principals to corral reluctant front-line agents, it therefore follows that substituting recalcitrant or indifferent agents for ideologically

amenable ones is a potentially effective change-inducing strategy if it can be accomplished on a significant scale. In the American education system, agents – teachers, principals, and superintendents – enjoy considerable discretion and this remains the case even in places where teachers unions have been weakened by right-to-work laws or other constraints on organising and bargaining. The empirical record abounds with instances of top-down directives, at odds with agents’ preferences, being denuded or blunted in implementation. But high levels of agent discretion cut both ways. Agents with different, *pro-reform* preferences can use their front-line discretion to enact the sorts of changes that reforming principals want to see.

Policymakers can remove or mitigate barriers to entry, and philanthropists can direct resources to challengers, but for change to be realised *on the ground* new agents must organise to exploit these opportunities. In recent decades, neoliberal reforms permitting charter schools and alternative teacher certification pathways created entry points for pro-reform agents. But entities like Teach for America were needed *to create a critical mass of agents inclined to take advantage of these openings*. Seen in this light, the recent progress of the reform movement despite a putatively rigid system is less puzzling than it initially appeared. In the next chapter these inductive insights from recent K-12 politics are abstracted to develop a more generalized model of institutional change through bottom-up agent action.

3. An Elaboration of the Concept of Institutional Subversion

The foregoing discussion has documented how, in recent years, the reform movement has made headway because it has had at its disposal a significant pipeline of front-line agents capable of using their embedded positions and discretion to affect change directly. But why did the unions allow TFA to become a major pipeline for the reform movement? Given the manifest power of the teachers' unions to resist change that cuts against their interests, and given that TFA has been demonstrably effective at instigating such changes, why didn't the unions just squash TFA at an early juncture? This is the question that motivates this chapter. By way of an answer, I argue that TFA was able to enter and gain purchase on the education system because it followed a *subversive* strategy of changemaking that took the teachers' unions and other powerful entities by surprise.

'Institutional subversion' describes a process whereby an institution is seeded with agents that work to remake it from within. Subversive change is possible when the incumbent regime fails to anticipate and counteract embedded agents' efforts to disrupt existing practices, norms, rules, and outcomes, until consequential change is already in train. My argument builds on two core tenets of 'second wave' historical institutionalism: first, that institutional change can be driven by strategic agent action, even in the absence of exogenous triggers or sudden institutional failures; and second, that the actions of agents who seek change are shaped and constrained by the particulars of institutional context. Different contexts give rise to more or less feasible change-making strategies, and practicable and optimal strategies for would-be change agents can be deduced through careful consideration of institutional features. In short, I argue that *subversive* action is a feasible and effective strategy for agents wishing to precipitate change in policy subsystems

characterised by: i) high levels of bureaucratic discretion, and ii) powerful professional groups with a vested interest in preserving the institutional status quo. The ensuing argument explains how and why a bottom-up *subversive* approach can gain traction in such a context, whereas top-down change or a more overt insurgency are less promising, or impossible to execute.

I contend that institutional subversion is a process unfolding in three phases. Subversion begins with organisation. In the first phase, individuals come together to address a specific short-coming that they perceive in the sub-system. Crucially, this newly formed organisation does not explicitly or directly assail the dominant groups that preside over the extant system. The nascent organisation's outwardly ambiguous preferences towards the extant regime and its uncertain capacities to affect change, permit it to establish a foothold in an otherwise well-defended system. From this foundation, the organisation can begin to underwrite, through the provision of material, human, and intellectual resources, the activity of agents motivated to affect ever more ambitious shifts in institutional practices, structures, and outcomes. In the second phase, adherents of the organisation (subversive agents) begin to instigate cumulatively significant change by introducing innovations alongside the system's existing structures – a process known as 'layering' (Capano, 2018; Koreh et al., 2019; Mahoney & Thelen, 2009; Streeck & Thelen, 2005; van Der Heijden, 2011) – and by seeking positions of power within the system's decision-making bodies. The gradual layering of innovations and progressive infiltration by subversive personnel means that change unfolds in a disaggregated and piecemeal fashion and its cumulative significance can be hard for incumbents to perceive until it is already well advanced. Eventually, however, should subversive activity substantially undermine the internal logic of the traditional system, and with it the core

interests of incumbents, we can expect a third phase of incumbent reprisals against the subversive organisation and its adherents. The outcome of this clash depends on the resources that the subversive organisation has acquired in the meantime. To the extent that subversives have thoroughly penetrated the institutional architecture, captured key decision-making posts, and cultivated a constituency for their reforms, their legacy of change might survive.

In essence, this is an argument about position and timing. By organising within key institutions and having, at least initially, uncertain capacities to affect – and outwardly ambiguous preferences towards – wholesale institutional change, subversive organisations have an opportunity to catalyse shifts in practices and structures before incumbents recognise their import and mobilise against them. In other words, subversive change relies on incumbent powerholders *miscalculating through imperfect information or flawed analysis* the true preferences and long-run capacities of the subversive organisation and its members.

In the pages that follow, I outline the scope conditions of this argument and define key concepts, before detailing how a subversive approach to change can be expected to unfold. In order to illustrate key mechanisms of the concept, I draw on empirical examples from a range of policy domains. These stylised cases also serve to demonstrate the generalisability of the posited model beyond American K-12 education. Having laid out a general conception of subversion, I turn to the puzzle of recent developments in American education. I show how a subversive model of change provides a more complete understanding of observed changes than the explanations commonly advanced in the extant literature. While new forms of philanthropic intervention, neoliberal ideas, and

the declining power of vested interests are important explanatory factors, they do not provide a sufficient account of the observed pattern of change. By focussing on the preferences and actions of embedded agents, my model of subversion shows how money and ideas are actually translated into concrete changes in structures and behaviours. Moreover, a subversive model complements interest-group-power-based explanations by detailing more precisely how rival agents organise to exploit even small gaps or declines in incumbent strength. In short, the model advanced here is complementary rather than contradictory of extant approaches, but adds a distinctive element to the existing corpus of knowledge on why and how complex sub-systems with entrenched interests can change.

Institutions and Policy Sub-Systems

I adopt the historical institutionalist (HI) understanding of institutions as ‘relatively enduring features of political and social life,’ comprised of rules, norms, and procedures (both formal and informal) that structure individual behaviour, and ‘cannot be changed easily or instantaneously’ (Mahoney & Thelen, 2009, p. 4). Moreover, I concur with the HI view that institutions are fundamentally distributive instruments, reflecting a relatively durable, but actively contested *and therefore potentially dynamic* settlement (Hacker et al., 2015; Pierson, 2016; Streeck & Thelen, 2005). This is because the ‘losers’ of past struggles – those whose interests are not best served by the present arrangements – do not simply disappear (Mahoney & Thelen, 2009). Whereas in voluntary market exchanges, potential losers ‘can simply walk away,’ in battles over public administration, the winning coalition wields the authority of the state to impose outcomes on the losers. Short of exiting the polity entirely, losers ‘can’t leave’ (Moe, 2005, p. 218; Pierson, 2016). Policy sub-systems therefore encompass agents with varying preferences, including those who, given the

opportunity, would overhaul the status quo. Change and stability are therefore outcomes of competition between coalitions with different preferences and resources, variously constrained and empowered by institutional rules and structures.

Such a conception of institutional stability – as the result of the ongoing mobilisation of superior resources by groups vested in the status quo – may seem self-evident. But as Peter Hall observes, ‘it stands in stark contrast to prominent alternatives attributing the durability of institutions to taken-for-granted logics of appropriateness or to the equilibrium qualities of institutions that promote coordination’ (2016, p. 40; Mahoney & Thelen, 2009). By focussing on the distributional and dynamic dimensions of institutions, ‘second wave’ historical institutionalists have shown that exogenous shocks or shifts in environmental conditions are but one driver of change. Consequential change can also come about when institutional agents strategically exploit ‘gaps and cracks’ in the enforcement of institutional rules and the limitations of incumbent power (Hacker, 2004; Hacker et al., 2015; Mahoney & Thelen, 2009; Streeck & Thelen, 2005).

More specifically, the argument advanced below is concerned with stasis and dynamism within a specific set of political institutions: *public policy sub-systems*. The ‘principal unit of analysis’ for studying policy processes, a policy sub-system is defined by a substantive issue and a geographic territory, for example, energy policy in France, policing in Britain, or, as concerns this thesis, school education in America (Weible, 2005, p. 461). A sub-system encompasses a set of stakeholders, and may include officials from any level of government, interest group and non-profit representatives, academic and industry researchers, consulting firms, the media, engaged citizens and potentially others. Policy sub-systems are invariably nested and overlapping (Cairney & Weible, 2015). The American K-12

education subsystem sprawls across all levels of government – encompassing teachers, principals, elected local school boards and district administrators as well as state and federal policymakers and bureaucrats. K-12 sector professional associations such as teachers’ unions, advocacy organisations, and non-profits, think tanks, consultancies and the news media similarly operate at a local, state, and national level. The education subsystem interacts and overlaps with others, such as the higher education, criminal justice, public law, and social security subsystems, to name but a few.

Sub-systems are also distinguished by the fact that they are semi-autonomous – in the sense that many of ‘the major levers that affect system outcomes are not directly in the hands of elected or appointed officials’ (A. Abbott, 1988; Mehta & Teles, 2012, p. 4). Over time, structures and outcomes in professionalised policy realms, such as law, medicine, and to a significant degree, education, have been increasingly determined by non-electoral mobilisation, rather than electoral competition and legislative fiat (Glenn & Teles, 2009; Grossmann, 2014; Mehta, 2013; Moe, 2006b; Moe & Wiborg, 2017; Pierson & Skocpol, 2007; Teles, 2008). Hence, while top officials or ‘macro-political actors’ (i.e. mayors, governors, and presidents) periodically intervene in the governance of American school education, much of its structure and the outcomes it produces are determined by those who dwell in the sub-system itself (i.e. teachers, principals, superintendents, school board members, teacher educators, state education commissioners) (Baumgartner & Jones, 2009; Hess, 2013; Payne, 2008; Redford, 1969). Consequently, we need to look beyond exogenous shocks or shifts that jolt issues into the ‘macro-political’ realm and focus instead on sub-system coalition building and strategic organisation if we are to understand fully the animating forces of change in professionalised policy domains. As

elaborated below, this fact of ‘semi-autonomy’ can serve to insulate subsystems from top-down reform, while allowing for agent-driven change from the bottom up.

Stasis and Change in Policy Sub-Systems: A Problem of Agency

Any effort to bring about change in a policy sub-system must contend with two enduring realities: First, all sub-systems involve a degree of delegated authority and bureaucratic discretion. Second, all policy sub-systems ‘everywhere, naturally, and inevitably’ give rise to vested interests ‘simply because certain people and groups reap benefits from what institutions do’ (Moe, 2015, p. 279). Chief among the vested interests in any policy-subsystem are the groups that derive employment from it. Emergency services personnel have a vested interest in municipal administration; doctors have a vested interest in the health system; teachers have a vested interest in the K-12 education system and so on. These professional groups have strong material incentives to organise and mobilise against reform when it threatens to diminish or compromise the benefits they derive from the system. The implications of these facts for policymakers trying to instigate top-down reform are well rehearsed in the public administration literature. Bureaucratic discretion, even when exercised in good faith, can result in departures from desired outcomes, blunting the effects of reforms (Lipsky, 1980; Pressman & Wildavsky, 1984). Likewise, agent-based organisations – such as unions and professional associations – can use their organisational power in collective bargaining and political activities to oppose change that threatens to erode or compromise their interests (L. K. Finger, 2018a; Freeman, 1986; Hoxby, 1996; Kearney, 1992; Moe, 2006b, 2011).

Consequently, policymakers hoping to introduce reforms that conflict with agents’ preferences and favoured practices face a dilemma. How can policymakers ensure agent compliance, when agents can exercise bureaucratic discretion and organisational muscle

to undermine top-down directives? One option is to try to break the organisational power of vested interests by prohibiting or diminishing the scope of collective bargaining, punishing strike action, or introducing right-to-work laws that limit union resources. But the more powerful a vested interest the more effectively it can defend against such efforts to curtail its power (Moe, 2005; Pierson, 2016). A second strategy is to try to limit agents' discretion over day-to-day operations, by issuing ever more prescriptive directives and monitoring behaviour more closely. But administrative delegation and bureaucratic discretion can never be entirely eliminated, and the inefficiencies and transaction costs of further prescription and monitoring may well exceed any gains from greater agent compliance (Le Grand, 2003; Mehta, 2013). A third strategy attempts to better align the agent's interests with the principal's through a system of incentives (such as higher salaries for the most capable performers) and sanctions (such as the threat of dismissal for noncompliant or incompetent individuals). But such efforts often struggle to overcome the countervailing forces of professional cultures, internalised obstacles, situational imperatives, and localised inducements (Hess, 2013; Wilson, 1978, 1991).

Yet another option for promoting change in entrenched systems, less thoroughly explored in the public administration literature, is to foster a cadre of agents that support reform and can exercise their bureaucratic discretion to bring about change from the bottom-up. Just as agent power can *frustrate* top-down change, so too can it *instigate* shifts in institutional practices and outcomes from below (Moe, 2006). In marked contrast to the other options, this latter approach makes a *virtue* of agent power and discretion, instead of chafing against it. Rather than taking recalcitrant agents as given and asking reformist principals to try to cajole compliance through top-down sanctions and incentives, this approach aims to reconstitute sub-systems from within by *empowering different agents with different preferences*

(Mehta & Teles, 2012). In short, agents can exploit the discretion inevitably afforded them in a sprawling policy sub-system, to *foster*, not merely thwart change. And reformist principals can harness this fact to their advantage if they can identify and empower agent-based organisations that share their preferences. Such an approach must contend with two obvious challenges, however. First, recruiting, organising, and resourcing reliable change-oriented agents is likely to be a difficult and costly enterprise (Olson, 1965; Teles, 2008). Second, would-be change agents are liable to be attacked by powerful groups within the sub-system who favour the status quo (Mahoney & Thelen, 2009; Moe, 2015). If bottom-up agent-driven change is to succeed, it must find a way to overcome these impediments.

Sub-Systems and Subversion: Actors, Preferences, Strategies

Policy sub-systems contain actors with different preferences and different capacities for realising said preferences. Chief among these groups are those actors who benefit from extant structures, and therefore have a strong preference against changes that might diminish their present utility. These vested interests are often referred to as ‘incumbents.’ Incumbents can be expected to mobilise against any change that threatens their interests (Mahoney & Thelen, 2009). They can also be expected to try to ‘institutionalise’ their existing advantages by moulding rules and norms in ways that delimit the scope of action for future challengers (Moe, 2005; Pierson, 2016). Any effort to instigate sub-system change must find a way of circumventing or overcoming the sources of incumbent advantage. Correspondingly, incumbents need good information about the preferences and capacities of other groups in the sub-system if threats to the status quo are to be nullified.

Incumbent Strategies and Advantages

Incumbents can exercise their power in a number of ways to ensure that institutional outcomes accord with their preferences. The first and most obvious way – what Bachrach and Baratz (1962) refer to as the ‘first face of power’ – is to prevail over a challenger in a direct contest. Winning an election or winning a vote in a legislature is an example of this sort of power. Another dimension of incumbent power is agenda control. For instance, if incumbents can prolong the duration of a decision-making process, they may be able to thwart a change that commands only a fleeting majority (Capoccia, 2016). Relatedly, incumbents can exert control over agendas by imposing standards of entry or criteria for promotion within the institution. Barriers to entry impose costs on insurgents, and promote a vested interest among entrants in maintaining the extant barriers (A. Abbott, 1988). A less observable, but nonetheless profound instrument of incumbent control is the discouragement of contestation through the implicit threat of recrimination. In other words, a weaker challenger rationally elects to avoid antagonising powerful incumbents because they anticipate reprisal (Moe, 2019; Pierson, 2016). Bachrach and Baratz (1962) refer to this as the ‘second face of power.’ Finally, incumbents can wield normative or ‘ideational’ control over an institution by so defining the bounds of acceptable thought that ideas contrary to incumbents’ interests become simply ‘unthinkable.’ Lukes (1974) calls this the ‘third face of power’; it is akin to Gramsci’s (2005) notion of ‘false consciousness.’

In large public bureaucracies, unions and professional associations tend to be key incumbent groups because they wield organisational power and they are vested in the status quo. This organisational power is used in direct and indirect ways to quash change that threatens the material interests of members. Collective bargaining is an example of

a direct exercise of power's 'first and second faces'. The 'first face' is apparent in both sides making demands and the fact that the bargained outcome reflects the respective strength of each side. The 'second face' is apparent in the anticipatory judgements each side makes about the capacities of the other to retaliate for an unacceptable outcome. For instance, a mayor engaged in contract negotiations with the city's emergency services personnel knows she must meet the union's minimal acceptable terms, or she risks a costly, disruptive, and potentially dangerous strike of essential employees.

Professional groups can also exploit their discretion to directly disregard or denude top down directives. For example, a Mayor wants revisions to the city's police contract because of budget blowouts and rising crime in certain places. The Mayor argues crime reduction targets can be met through a more efficient allocation of resources. A reduction of routine overtime will fund more police officers in crime hot spots. Many police officers resent the reduction of overtime hours. The union instructs its officers to simply stop booking crimes towards the end of their shifts because the required paperwork takes them into unpaid overtime. The officers' behaviour ultimately amounts to a reduction in arrests and prosecutions and an increase in reported, unresolved crimes. The Mayor's plan is thwarted by the autonomy of rank and file officers to perform their duties discriminately.

Unions and professional associations also wield power over sub-system outcomes by influencing professional standards – in particular, standards of entry and promotion (A. Abbott, 1988). Barriers to entry impose costs on would-be entrants with different preferences about how the profession should operate, while incentivising extant entrants to maintain the status quo. Occupational licensing, for example, ensures that a profession is comprised only of individuals with a vested interest in maintaining the extant licensing

structure, thereby insulating the profession from ‘unqualified’ competitors (Teles, 2008). Unions and professional groups also arbitrate professional norms and cultures – what Bachrach and Baratz refer to as ‘the dominant values and the political myths, rituals, and institutions which tend to favour the vested interests of one or more groups’ (1962, p. 950). An example of such a ‘dominant value’ is the notion, widely advanced by teachers’ unions, that teachers ought to be paid in accordance with experience and credentials and not according to direct measures of how effectively they help students to learn.

Finally, unions and professional associations exercise power indirectly through their participation in electoral politics. By mobilising large amounts of money and personnel, unions and professional associations can exert influence over which candidates win office, and subsequently over how those candidates vote on legislation that affects their interests (Anzia, 2013; L. K. Finger, 2018a; Moe, 2015). For instance, a Democratic state legislator who receives substantial electoral support from the teachers’ unions may be disinclined to vote in favour of a bill that the union opposes, for fear of losing valuable campaign assistance. In sum, any effort to reform a sub-system against the wishes of the professionals that work in it, is liable to encounter resistance of the varieties enumerated above.

Incumbents and Imperfect Oversight

Incumbent groups have several ways of defending their position and defeating change. But incumbents are constrained by imperfect institutional oversight. Threats to the status quo must be *recognised* before they can be resisted or attacked. A major challenge faced by incumbent groups (and one that precedes the optimal allocation of finite power resources) – is the availability of good information about the preferences and capacities of other

groups in the policy sub-system. When reform is initiated from the top down, this problem of information is largely obviated because principals tend to publicise the changes they hope to institute and the instruments they will employ to realise them. But bottom-up change driven by the actions of *other agent-based groups* may be hard for incumbents to detect until it is well advanced. Incumbent missteps arising from information gaps about the preferences and capacities of rival agents can have profound institutional repercussions.

The example of the recent transformation of the British Labour Party, though not itself a policy sub-system, illustrates this problem of imperfect information quite starkly. In 2014 the leadership of the British Labour Party modified the process for selecting Party leaders. The new rules created a one-member one-vote selectorate and permitted all registered party ‘supporters’ to participate in leadership elections. The changes were not intended, nor anticipated, to alter the ideological composition of the party, but rather to grow the membership base and reduce the influence of trade unions, thereby giving leadership elections a greater sense of ‘democratic legitimacy’ (Russell, 2016). To the surprise and horror of the incumbent moderate faction, what had been intended as a modest adjustment to process, resulted in a wholesale reconstitution of the Party. Under the banner of *Momentum*, far-left activists flooded the membership rolls in order to cast votes for Jeremy Corbyn, a hitherto marginal figure. Corbyn was duly elected and has overseen a dramatic change in the Party’s ideological orientation and its rank-and-file composition, the ramifications of which will outlast his tenure as Labour leader (Helm & Savage, 2017).

The incumbent Labour moderates who presided over the rule change never anticipated that Corbyn’s brand of politics could command a sizeable following within the party. Under Blair, Corbyn had been indulged; while considered a ‘nuisance,’ he was also

thought an ‘irrelevance.’ ‘You really don’t have to worry,’ mused Blair in 1996, ‘about Jeremy Corbyn suddenly taking over’ (Beckett, 2017, para. 8). ‘There was no threat,’ said Keith Hill, deputy chief whip during the Blair government. ‘These people were tolerated because no one had ever heard of them’ (Pickard & Mance, 2016). On the eve of Corbyn’s ascension to the leadership, conventional Labour Party wisdom had him pegged as ‘a particular sort of British socialist: stubborn, unchanging...and *uninterested in power*’ (Beckett, 2017, para. 8, emphasis added). The failure of incumbent Labour figures to grasp the true preferences of the Corbynite wing and their capacity to exploit the small opening afforded by the leadership’s new rules, laid the foundations for a dramatic institutional shift.

Another example of consequential change unfolding under the noses of incumbents can be found in Tulia Falleti’s account of the gradual subversion of the Brazilian healthcare system by a network of leftist medical professionals (known as *sanitaristas*), working under military dictatorship in the 1970s and 80s. It is commonly assumed that the decentralisation and universalisation of Brazil’s healthcare system came about abruptly at the point of democratic transition. Falleti argues against a ‘critical juncture’ explanation, showing that the health reforms introduced in 1988 were the result of a much more gradual process, driven by the long-run infiltration of the state by a reformist element. Over decades, the *sanitaristas* unleashed innovations in universal and localised care that gradually spread from the peripheries of the Brazilian system towards the centre. The ruling military junta countenanced the *sanitaristas* initial experiments because the delivery of cheap healthcare to the regions helped to quell social discontent. But the junta did not anticipate that these ‘apparently subtle changes on the margins’ might diffuse throughout the country and culminate in radical national reform. The extent of the *sanitaristas*’

influence was only revealed belatedly, when the 1988 constitution codified ‘changes that had been percolating beneath the surface and had been nurtured at the local level for more than a decade’ (Falleti, 2009, p. 58). In short, front-line agents exploited their bureaucratic discretion to introduce changes that were unanticipated by the incumbent powerholders.

Subversive Agency

While imperfect information is the primary constraint faced by otherwise powerful incumbents, would-be change makers must overcome a different set of challenges. The first challenge is organisational. Challengers must find a way to bring together agents motivated to try to change the status quo. Second, they must overcome or work around powerful groups that are vested in sub-system stability and determined to maintain their advantageous position. In sub-systems where there are major power asymmetries between incumbents and challengers, overt agitation for change and direct challenges to incumbent control are infeasible, because incumbents have many ways of snuffing out incipient threats *if they are detected*. Overt contestation is an irrational strategy because it expends scarce resources and risks retaliation from the powerful (Pierson, 2016, p. 127). A subversive strategy, on the other hand, provides an oppositional outlet to those with few power resources and for whom other avenues of pursuing change are foreclosed. Put differently, when ‘voice’ is too risky, ‘exit’ precludes the chance to pursue change, and ‘loyalty’ to the incumbent regime is unconscionable, subversion provides a fourth option for would-be change agents (Hirschman, 1970).

Rather than mounting a direct challenge, subversive organisations ‘effectively disguise the extent of their preference for institutional change by following institutional expectations

and working within the system' *until* an opportunity arises to move towards a stance of opposition without risking a catastrophic reprisal (Mahoney & Thelen, 2009, p. 25). In the meantime, subversives can advance their preference for change in two ways. First, by developing innovations in structures and practices that compete with the existing ones; and second, by positioning to take control through infiltrating the sub-system hierarchy and capturing ever more discretionary power. To return to the examples above, Corbyn could never have won the Labour leadership under the old rules as he has never commanded majority support among Labour members of Parliament (Russell, 2016). Nor could his traditionally marginal faction have instigated a rule change themselves. Had they attempted such a direct assault on the Blairite incumbency, thereby signalling their ultimate interest in seizing control, it is likely they would have been deselected or expelled from the Party (Beckett, 2017; T. Harris, 2018; Pickard & Mance, 2016). Instead, the Corbynites had to wait for the incumbents to slip up. By miscalculating the repercussions of modifying the process for choosing a party leader, the moderates provided an opening for overt oppositional action. Similarly, the *sanitaristas* did not wield the power necessary to overthrow the ruling junta or force an official change in Brazilian healthcare policy. Instead, they exploited the limits of incumbent oversight and the power of agent discretion to unleash experiments that gradually and discretely diffused their preferred model throughout the sub-system. In short, incumbents, no matter how entrenched and powerful are not omniscient nor omnipotent, and to the extent that agents can remain 'under the radar' they have an opportunity to affect consequential change.

Before outlining how a subversive strategy of change unfolds, it is important to distinguish the subversive from other types of change agent canvassed in the public administration

and historical institutionalist literatures. Table 6, below, summarises key distinctions between agent types with regard to motive and institutional position:

Table 6: Distinguishing Subversives from Other Agents of Institutional Change					
Dimensions	Actors				
	Subversive	Symbiont	Opportunist	Street Level Bureaucrat	Policy Entrepreneur
Preferences	Conscious, programmatic preference for change is pursued incrementally and ‘under the radar’ of institutional incumbents	Self-interested and instrumental; has no a priori preference for institutional change; indirectly precipitates change by undermining norms and rules through extractive behaviour	Self-interested; has no fixed, in-principle preference for change. May be induced to join a pro-change coalition if change looks likely and would maximise material benefits.	No conscious preference for change; SLB must reconcile top-down pressures from principals and bottom-up demands from client groups. Over time, repeated exercising of discretion may produce consequential change in outcomes	Strong preference for change; exploits infrequent ‘windows’ of opportunity to bring about major shifts
Locus	Within the institution; usually in lower ranks, at least initially (Mahoney & Thelen, 2009)	Within the institution (Mahoney & Thelen, 2009)	Within the institution (Mahoney & Thelen, 2009)	Within the institution; at the bottom of a top-down bureaucratic structure (Lipsky, 1980)	Multiple possibilities, but often outside of targeted institution (Kingdon, 1984; Mintrom & Norman, 2009; Sheingate, 2003)

The subversive differs from other institutional actors whose actions may incidentally produce change, but are not borne of an *a priori* preference for change. This distinction is drawn out in Mahoney and Thelen’s conception of ‘symbionts’ and ‘opportunists’. Symbionts rely on the preservation of an institution as a continued source of rents or other benefits, but their extractive activities undermine the ‘spirit’ or purpose of the institution resulting in gradual change through ‘drift’ or neglect. Opportunists are similarly self-interested. They will join a pro-change coalition if they come to believe that change is likely and that it would serve their material ends equally well or better than the status quo (2009, pp. 26–27). Their support for change is thus contingent and instrumental, whereas

the subversive is motivated by a desire for change above all else. Motive also distinguishes the subversive agent from Lipsky's (1980) 'street level bureaucrat.' While both types of agent employ professional discretion to meet their desired ends, the street level bureaucrat does so reactively and pragmatically – to reconcile the often conflicting pressures imposed by a principal's expectations on the one hand, and the demands of user or target groups on the other. By contrast, the subversive agent's conscious and primary aim is to alter institutional structures so that they better accord with her subjective notion of the ideal system.

While both share a conscious and programmatic preference for change, subversives are distinguished from the broader category of 'policy entrepreneurs' by their position *within* the institution they aim to disrupt, and by the distinctive approach subversives take to instigating change. Whereas the policy entrepreneur, as seminally defined by John Kingdon, 'could be in or out of government, in elected or appointed positions, in interest groups, or a research organisation,' the subversive agent is situated at the heart of the policy subsystem targeted for reform (1984, p. 122). A subversive might thus be considered an *institutionally-embedded* policy entrepreneur. The subversive's inside position affords bureaucratic discretion and the ability to *directly affect* institutional structures and outcomes, albeit incrementally. They can therefore work in a less contingent and opportunistic fashion than the 'at large' policy entrepreneur, whose changemaking efforts depend on a serendipitous alignment of 'problem, political and policy streams' (Kingdon, 1984, p. 122). On the other hand, because subversives operate under conditions of entrenchment and on the sufferance of dominant groups, they are liable to adopt a much more gradual and 'under the radar' approach to change (Mahoney & Thelen, 2009). By contrast, the policy entrepreneur can instigate major reforms quite suddenly if an

exogenous shock or profound shift in environmental conditions overturns the ‘policy monopoly’ of powerful incumbents (Baumgartner & Jones, 2009; Mahoney & Thelen, 2009). In other words, the subversive works consistently and discreetly over time to exploit small openings within the system, while the policy entrepreneur capitalises on infrequent opportunities to bring about rapid large-scale reforms. More figuratively, if policy entrepreneurs are, in Kingdon’s memorable phrase, ‘surfers waiting for the big wave,’ (1984, p. 165) subversives are more akin to ‘moles in the system’ or ‘termites in the basement’ (Mahoney & Thelen, 2009, p. 31)

How Does Subversion Unfold?

Subversion on any scale is inevitably a collective endeavour, requiring organisation and coordination among agents. Moreover, because subversive change is a cumulative and attritional process, subversive organisations need to be built and sustained over long periods. The origins of subversive action therefore lie in the formation of a subversive organisation. Subversive organisations perform two key functions: i) the *recruitment* of agents who will carry out the actual work of disrupting institutional reproduction; and ii) the provision of *resources* that sustain disruptive activity. In performing these two functions, subversive organisations lower the transaction costs of collective action.

Organising subversive agents is a delicate undertaking as organisations must operate under the hegemony of incumbent groups that exert influence over barriers to sub-system entry, professional cultures, and agendas. We can therefore expect subversive organisations to adopt behaviours and strategies that promote change while minimizing the risk of reprisals from dominant groups vested in system stability. One way subversives achieve this is by appearing to be too weak to mount a serious challenge to incumbent

control. For instance, the Blairites never thought the Corbynites were capable of winning control of the Labour Party, and the Corbynites – wittingly or otherwise – encouraged this notion by supporting all sorts of quixotic causes and hopeless cases. In fact, the idea that the Corbynites actually *wanted* power was broadly dismissed by many Blairites (Beckett, 2017). Another way of striking this balance is for subversive organisations to obscure the extent of their preferences for change. In other words, a subversive organisation can have a declared mission that is simultaneously tolerable to incumbents *and* attractive to agents who are not vested in the status quo, and who, with the adequate resources, would work to change it. For instance, Falleti’s *sanitaristas* were tolerable to the Brazilian junta because their experiments in localised care quelled social unrest. But this mission was simultaneously attractive to doctors with revolutionary ambitions because it allowed them to gradually develop a universal and devolved national healthcare system.

A third way that subversive organisations can remain beneath the notice of incumbents is through the gradual accretion of disruptive ambitions and actions. In other words, an organisation may not be founded with disruptive ambitions, but may, over time, develop a desire and capacity to affect consequential change. Because this disruptive capacity develops slowly, it may be difficult for incumbent groups to detect until it is already well advanced. The example of the Federalist Society illustrates how a modest organisation initially founded to address a specific institutional shortcoming, can ultimately develop into a powerful force for systemic change. In 1982, a small group of conservative law students created the Federalist Society with the simple intention of providing a forum for discussing and debating conservative opinion on public law – a perspective that they felt was missing at America’s elite law schools (Teles, 2008). As Steven Teles notes, conservative law students ‘alienated in their home institutions’ and ‘desperate for a

collective identity’ presented a ripe opportunity for organisational entrepreneurship (2008, p. 139). The Society soon grew beyond its initial chapters at Yale and Chicago Law Schools and broadened its scope to include regular meetings of legal professionals.

Though it was set up by individuals dissatisfied with the liberal predominance in American public law, none of the Society’s founders foresaw that the organisation might one day have the capacity to meaningfully challenge the prevailing liberal order. ‘We did not know we were starting a national organisation when we started this’ reflects Lee Lieberman Otis, a key organiser of the Society’s first conference at Yale (quoted in Teles, 2008, p. 155). Forging a cadre of conservative champions who would, over a matter of decades, seize the commanding heights of the legal establishment was not the initial intention of the Society but it has been its major legacy, in large part because it was *obliquely* pursued and *realised only gradually*.

A key decision of the Society’s founders was to ‘narrow its mission to *facilitating* the activism of its members and influencing the character of intellectual debate, *rather than directly influencing the actions of the government itself*’ (Kruse, 2018; Montgomery, 2019; Teles, 2008, p. 136, emphasis added). The Society does not take policy positions, nor does it explicitly endorse or rate candidates for judicial appointment – ‘it is *not* an interest group’ (Teles, 2008, p. 153). The direct output – the ‘club good’ – that attracts members is intellectual debate and fellow feeling, but the *indirect* output has been the gradual development of an increasingly powerful network of lawyers and jurists. Ultimately, this network has changed the face of American public law (Montgomery, 2019):

None of the Society’s effects on the politics of judicial nominations, networking, placement of members, or facilitating connections across government is denied or foresworn by its leaders...[but]...the Society could never have produced these effects had it pursued them directly. By limiting its programming, and thereby

nurturing a reputation for intellectual seriousness and distance from short-term partisan politics, the Society has, perhaps paradoxically, been more effective in serving the political goals of its allies than a more directly partisan organisation could have ever been (Teles, 2008, p. 163).

No one, not even its founders, initially anticipated the conservative powerhouse that the Federalist Society would ultimately become (Kruse, 2018; Montgomery, 2019; Teles, 2008). A mere debating club posed no obvious threat to the liberal hegemony over public law when it was founded in the early '80s. But both friend and foe alike now recognise the Federalist Society as a vital network and resource for the largely successful effort to disrupt the prevailing liberal regime (Montgomery, 2019). As Antonin Scalia enthused at the Society's twenty-fifth anniversary dinner in 2007, 'we thought we had planted a wildflower in the weeds of academic liberalism. Instead it was an oak' (cited in Kruse, 2018).

In short, subversive organisations can gain the forbearance of incumbents because their capacities to affect even modest change are highly uncertain, and/or their preferences towards the prevailing regime are ambiguous. This ambiguity can arise either through deliberate obscuring *or* because organisational ambitions and capacities expand gradually – a la the Federalist Society. Critically, however, in bringing together individuals unhappy with the status quo, the subversive organisation creates the conditions for developing a cadre of change-agents intent on more dramatic institutional reformation. Over time, the organisation can attract and channel vital intellectual, social, and potentially financial resources to reformist agents who can leverage their bureaucratic discretion to instigate change.

It is important to note that while Subversive organisations advance particular interests, they are not *conventional* interest groups or advocacy organisations. While interests groups

typically lobby and agitate *directly* (and often openly) for change, a subversive organisation is, rather, a *conduit* or *nursery* for oppositional agents. This is a crucial distinction, for it is the *obliqueness* of the subversive organisation's influence that gives it its potency. This obliqueness creates a window for subversive organisations to channel change-agents into the sub-system without provoking reprisal. Incumbent groups are not liable to attack a subversive organisation until and unless the disruptive effects of subversive agents reach a critical mass. By this stage, however, the subversive organisation has largely done its job; its agents are already embedded in the system, and the organisation has had time to grow and amass resources that may enable it to withstand incumbent reprisals.

How do subversive agents instigate change?

While powerful interests can generally protect institutional rules from being directly overturned or 'displaced,' they cannot necessarily prevent agents from 'layering' new elements alongside the existing ones. Over time, these innovations in structure, practices, and norms can siphon away support for the previous arrangements (Mahoney & Thelen, 2009, p. 20; Streeck & Thelen, 2005). Indeed, the HI literature abounds with instances of incremental but consequential change through 'layering,' in contexts where powerful vested interests, strong policy legacies, increasing returns to the status quo, and path dependencies precluded more direct or comprehensive overhaul (Béland, 2007; Capano, 2018; Falletti, 2009; Graf, 2018; Hacker, 2004; Palier, 2007; Peters, 2012; Thelen, 2004). As Koreh *et al* note, layering is especially likely to occur 'when change agents have discretionary capacities regarding the addition of new institutional arrangements' but the 'rigidity of the targeted institution makes it less susceptible to conversion' (2019, p. 7). Consequently, we can expect that 'layering' will be the primary mode of change employed, at least initially, by subversive actors. Should subversive layering succeed in

undermining the coherence of a sub-system to a significant degree, this change in institutional context may afford opportunities to enact additional modes of change, such as conversion, or displacement (Koreh et al., 2019).

Layering can take various forms, such as the addition of new policy instruments; the addition of new rules permitting new actors and arenas; or the addition of new goals to those of existing programs (Capano, 2018). As system stakeholders and other agents progressively embrace the new elements, the traditional structures are marginalised through *differential growth*, and the overall coherence and internal logic of the traditional system is undermined (Streeck & Thelen, 2005). A classic example of this sort of change is the introduction of voluntary private pension systems alongside existing public ones (Capano, 2018; Hacker, 2004; Palier, 2007; van Der Heijden, 2011). While the ‘established public system may well be unassailable, faster growth of the new private system can affect profound change by, among other things, draining off political support for the public system’ (Streeck & Thelen, 2005, p. 25). A point under-explored in the layering literature is that while principals oftentimes create the conditions for layering to occur by adding new rules to extant systems, *actual change* is only realised when sub-system agents and stakeholders exploit the new rules to *create* new structures (Capano, 2018). For instance, while legislators can pass a bill to permit private pension schemes, the overall structure of the system will remain unchanged unless private firms step in to create new and attractive schemes, and a critical mass of the population take them up.

Falleti’s study of the subversion of the Brazilian healthcare system suggests that large, decentralised sub-systems may be especially amenable to subversive layering. Brazil’s federal structure allowed for innovation and experimentation in territorially bounded

areas on the peripheries of the national system. Changes unfolding at the local level and from the bottom-up went unchecked by incumbents because it was difficult to foresee that that these initially small-scale and apparently disparate developments could eventually diffuse widely enough to precipitate a wholesale transformation of the national system (Falleti, 2009). Moreover, in a large, devolved system there are simply more venues for agents to ‘shop,’ increasing the likelihood that subversives will find an amenable foothold in which their innovations can take root, and from there, spread towards the centre (Holyoke et al., 2012; Mahoney & Thelen, 2009).

While layering can erode support for extant structures, it does not destroy them, nor does it directly affect the decision-making structures of the traditional system. But layering can grow the constituency for more sweeping change within the sub-system, such that change-agents may eventually have the power resources to take over decision-making. In other words, if subversives can capture decision-making posts, they may be empowered to *convert* traditional structures to new ones (Béland, 2007; Graf, 2018; Koreh et al., 2019; Palier, 2007). In any event, given that those who hold formal decision-making power have a better chance to ‘work their will upon the world’ we can expect subversive agents to try to capture positions of power within the decision-making hierarchy (Goodin, 1996, p. 16). Again, Falleti’s (2009) study suggests that sprawling and devolved subsystems are especially amenable to subversive *infiltration* just as they are to subversive *innovation*. She notes that between Brazil’s local, state, and national health agencies, there were simply more positions to be filled by reformist *sanitaristas*. Local positions were poorly surveilled by the incumbent junta and relatively permeable to newcomers. Even the lowliest local position represented a critical toe-hold inside the Brazilian health policy apparatus, and from these vantage points influence could be progressively accrued and exerted.

Subversive organisations underwrite *innovation* and *infiltration* by providing agents with crucial resources and by concentrating and coordinating their allocation. One of the ways that a nascent subversive coalition builds and maintains itself is through the crafting and dissemination of a shared set of beliefs and knowledge about the extant system, how it ought to change, and how agents might realise these changes given institutional constraints. A subversive organisation serves as a sort of ‘broker’ and ‘distributor’ of this information. For instance, the *sanitarista* movement was built on a set of well-defined beliefs about preventative care, health as a human right, and the decentralisation of healthcare delivery. These principles were developed and disseminated through professional journals and by medicine departments of Brazilian universities which were heavily infiltrated by *sanitarista* members (Faletti, 2010, 48). These intellectual resources and the network it helped to sustain continued to be important once regime change in the mid-1980s created an opportunity for open contestation over the direction of Brazilian health policy: ‘the *sanitarista* movement emerged as a strong voice with a well-shaped reform proposal in the constitutional convention of 1988’ (2009, p. 55).

As Hollis-Brusky (2015) notes, the Federalist Society performed a similar function for the American conservative legal movement. Ideas for reform circulated rapidly among the fluid ‘political epistemic network’ that the Society created. The Society reduced the transaction costs of change-making in another important respect too, by serving as a ‘broker’ of relationships between fellow activists. Federalist society membership brought likeminded individuals into contact with one another, emboldened their thinking and actions, and created ‘connections between individuals across the country that could certify individuals as ideologically suitable for positions as judges and clerks’ (Teles, 2008, p. 193)

With the advent of the Federalist Society, conservative judges and Republican administrations looking for ideologically sympathetic staff now had a central repository of talent to draw on. Philanthropic and political patrons of change likewise found in the Federalist Society an obvious place to ‘invest’ resources and be readily connected with innovators and reformist agents. In this fashion, subversive organisations can channel resources from outside of the sub-system and convert them into influence within it.

How do institutional incumbents respond if subversive action catalyses significant change?

While incumbents may tolerate a degree of defection at the margins of the system, substantive change – that is, change that threatens their core interests – will not go unnoticed or unchecked indefinitely. If subversive instigated change is beginning to ‘bite’ incumbents will use their institutional power to ‘bite’ back (Capoccia, 2016). If the perceived costs of allowing subversive activity to continue exceed the costs of quelling the threat we can expect incumbents to attack subversive innovations and agents, and the organisation that underwrote them. Institutional stability is, after all, the product of an ‘ongoing mobilisation of resources’ by incumbents (Mahoney & Thelen, 2009, p. 9).

A subversive approach to changemaking is, therefore, inherently limited. Successful subversion – that is, catalysing a consequential shift in the institutional status quo – means relinquishing the ambiguity and/or apparent benignity that permitted the initial changemaking. Once subversives’ true preferences and capacities are revealed to incumbents, subversive agents cease to be subversives, and must instead engage in direct contestation for institutional control as insurrectionaries. The outcome of this contestation depends on the balance of power resources between incumbents and challengers. Where subversive innovations have acquired a sustaining constituency, they

may survive incumbent reprisals. Without a supportive constituency, they are vulnerable to reversal by political enemies looking to restore the *status quo ante* (Moe, 2017; Patashnik, 2008). Likewise, we can expect incumbents to seek to expel known subversives from positions of influence within the policy sub-system if they have sufficient power resources to do so. The subversive organisation that spawned the agents, and provided vital resources for innovation and infiltration, is also liable to come under attack.

In large and diverse sub-systems, where the strength of incumbents varies across venues, we may see ‘balkanisation,’ whereby challengers exert control over certain venues and/or domains of policy, while incumbents retain or regain control over others, and neither group can be said to be fully in control. As Sheingate observes ‘rather than resemble a process of creative destruction as Schumpeter envisioned, in which new institutional forms displace older ones, innovation in the political world will most often result in a series of partial and incomplete victories. Institutional change takes place, but it is through the accumulation of these partial victories’ (2003, p. 200). Certainly, that has been the result of several decades of contestation for control of American public law. While the Federalist Society has ‘injected competition into the legal profession,’ the conservative legal movement does not constitute, ‘at least for now, a new establishment’ (Teles, 2008, p. 194) (2008, 194). Ultimately, the success of a subversive effort is reflected in the extent to which the objectives of subversives are institutionalised. In order to declare a subversion completely successful, erstwhile challengers must become the new incumbents.

Empirical Implications of a Subversive Strategy

Accounts of institutional change predicated on analyses of equilibria and the timing of exogenous shocks risk losing sight of the dynamic, contested character of politics. The

forgoing discussion suggests how one might approach the puzzle of change in seemingly entrenched settings by elaborating the concept of institutional subversion. In short, regimes are never pure monopolies. If they were, ‘losers in politics would have no option but to sit back and wait for some exogenous shock to bring them salvation’ (Teles, 2008, p. 268). Few, if any, regimes are so entrenched as to be invulnerable to challenge, but mounting a challenge requires skill and acuity to perceive and exploit opportunities. As Teles notes, because skilled agents are a ‘scarce commodity,’ there will often be ‘big bills left on the sidewalk’ of institutional competition (2008, p. 271). I argue that incumbent miscalculation about the preferences and/or capacities of potential challengers is an important and hitherto under-explored variable in the dynamics of institutional change. Incumbents are not omniscient nor omnipotent - it is hard to know what might be percolating beneath an apparently durable equilibrium. Indeed, it can be especially difficult for incumbents to monitor activity on a system’s peripheries . As Falleti (2009) shows, the prospect of incumbent miscalculation due to imperfect information is liable to be especially acute in large and devolved policy sub-systems. By the time the true preferences and capacities of rival agent-based groups become manifest, substantial change may already be in train.

Subversive organisations bring together agents who are dissatisfied with at least some aspect of the current system and provide them with resources that help to erode the status quo. Subversive agents ‘layer’ innovations alongside existing structures and progressively infiltrate the decision-making apparatus of sub-systems. This disaggregated, cumulative nature of subversive change gives it its potency. Like the slowly boiling pot that eventually does for the proverbial frog, the ultimate import of subversive action can be difficult to grasp until it has already reached a critical point. Table 7, below, details these conceptual

elements and the corresponding empirics that would need to be observed in order to classify a case of changemaking as an instance of subversion.

Table 7: Conceptual Elements and Observable Implications of Subversive Change		
	Element	Observable Implications
Scope Conditions	A. Barriers to outright reform	1. Actors who oppose change and have the power to block or frustrate it 2. Powerful constituencies who would lose from change in the status quo
1. Set Up	B. Aspirations for change	1. Organisation of sub-system agents is founded to address specific unmet need in existing sub-system 2. Organisation's leaders have, or develop over time, a preference for systemic transformation.
	C. New agent-based organisation has uncertain capacities	1. Organisation's capacities to affect change are uncertain because: • Organisation is weak relative to incumbent groups - And possibly also: • Organisation's preferences towards systemic change are <i>outwardly</i> ambiguous; i.e. they are deliberately obscured, or evolve to become more ambitious over time
	D. Incumbents have imperfect information	1. Incumbents do not perceive disruptive potential of nascent organisation and therefore do not attack it
	E. Foundations of subversive action	1. Organisation brings together individuals who are dissatisfied with status quo 2. Over time, organisation provides resources and conditions to support agent-instigated change-making
2. Mobilisation	F. Agent-instigated change: <i>layering of innovations</i>	1. Agents exercise discretion to add new practices/rules/norms with a different institutional logic to existing ones 2. New logic gradually expands through differential growth, but does not supplant old practices/rules/norms 3. Diffusion of new practices/rules/norms weakens coherence of sub-system 4. New structures grow the coalition in favour of broader changes (positive feedback)
	G. Agent-instigated change: <i>infiltration and conversion</i>	1. Agents progressively infiltrate decision making apparatus of traditional system 2. Agents use decision-making power to <i>convert</i> old structures to new ones, accelerating pace of change

3. Backlash	H. Incumbent reprisal	1. Incumbent groups eventually recognise organisation and agents as a threat to their interests 2. Incumbent groups that were previously tolerant of or oblivious to the subversive organisation now manifest much more hostility towards it. 3. Incumbents try to reverse innovations 4. Incumbents try to wrest decision-making power from subversive agents
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The argument applied

Having expounded a general model of subversion, this section explains how it applies to the American education sub-system. I begin by surveying the insufficiency of alternate explanations for recent reforms to the K-12 education system. I show that a subversive model of change fills gaps in the extant literature and offers a *prima facie* plausible account of Teach for America's success in instigating change in a notoriously 'sticky' system.

As canvassed in Chapter 2, a voluminous literature on American education politics expounds the system's resistance to change because of the power of professional interest groups vested in the status quo and the difficulties of engendering agent compliance with top-down directives (Cuban, 2015; Greene, 2015; Howell, 2005; Moe, 2011; Peterson et al., 2014; Tyack & Tobin, 1994; M. R. West et al., 2012). Yet notwithstanding the considerable forces of inertia and resistance at work in the US education system, notable change *has* taken place in the past decade or so, albeit in a more patchwork and piecemeal fashion than reform advocates would wish. As Verger *et al* note:

The push for education [reform] in the United States has been gradual, limited, and uneven in nature. Nevertheless, given the country's long-standing model of a predominantly public and rather uniform system of educational provision, the sum total of education changes that have occurred in the last decades represents a remarkable shift (2016, p. 69)

The underlying causes and drivers of these observed changes are yet to be fully accounted for in the politics of education literature. A number of studies have documented the

influence of philanthropic patrons in financially underwriting many of these developments (Hess & Henig, 2015; Reckhow, 2013; Reckhow & Snyder, 2014; Tompkins-Stange, 2016), while other studies have invoked the ascendancy of neoliberal ideas among policymaking elites (Peters, 2012; Verger et al., 2016), or the fact that the power of teachers' unions over education policymaking has been eroded in recent times (McCollow, 2017; McGuinn, 2006; Moe, 2017, 2019; Strauss, 2018). These factors have undoubtedly been instrumental in the recent advances of the reform movement, but a complete explanation must also pay attention to how and why *agents* of reform – the actors charged with concretely realising changes on the ground – have gained influence over the day-to-day operations of a notoriously sticky sub-system. Several recent studies underscore Teach for America's vital and catalytic role in providing 'amenable agents' for the reform movement, but none of these accounts explains how it is that this manifestly disruptive organisation gained a foothold in a system hostile to change and change agents (L. Finger & Lastra Anadon, 2018; M. Higgins et al., 2011; Kretchmar et al., 2014, 2018; Mehta & Teles, 2012; Scott et al., 2016). A subversive model of change offers an answer to this question.

Existing explanations for the reform movement's success and their respective limitations are summarised in Table 8, below, and discussed in turn. In so doing, I show how a model of subversive agency affords a more complete understanding of recent developments.

Table 8: Alternative Explanations and Their Limitations		
Explanation	Contention	Limitations
New Money	Changes in volume/nature of philanthropic giving catalysed reform (Hess & Henig, 2015; Reckhow, 2013; Tompkins-Stange, 2016)	Who do philanthropists give their money to? How does philanthropy overcome principal-agent problems?
New Ideas	Dominance of neoliberal ideas among policymaking elites drove choice and accountability reforms from 1980s onwards (Mcguinn, 2006; Verger et al., 2016)	Who actually <i>executes</i> these new policies? How do top-down reformers overcome principal-agent problems?
Weakened Vested Interests	Weakening of teachers unions through various means has enabled introduction of reforms (Goldstein, 2015; Moe, 2017, 2019)	How is the opportunity afforded by beleaguered/distracted incumbents <i>actually exploited</i> on the ground?
Subversive Agency	New agents, sympathetic to change, have disrupted traditional structures and practices and were able to do so because incumbents did not initially perceive them as a threat to status quo	What other factors/conditions created a favorable opportunity structure for agents to make headway within the system?

The limitations of existing explanations

Philanthropic Investment in Reform

Since the turn of the millennium, we have seen a significant change in patterns of philanthropic grant-making in education. Both the overall volume of donations and the recipients of philanthropic largesse have shifted significantly. Throughout much of the twentieth century, Progressive- and New Deal-era foundations endowed by long-dead patrons, such as Kellogg and Carnegie, dominated ‘edu-philanthropy’ and tended to channel grants towards traditional public school districts and structures (Tompkins-Stange, 2016). By the early 2000s, however, large new foundations endowed by living donors with distinct views on policy, such as Gates, Walton, and Broad, began to dramatically outspend their older counterparts. Money from the new foundations was largely directed toward entities that challenged the traditional system, such as charter school management organisations and alternative teacher certification programs (Greene,

2015; Reckhow, 2013). Several scholars have argued that the new dynamics in educational philanthropy have accelerated the progress of the reform movement (Greene, 2015; Hess & Henig, 2015; Reckhow, 2013; Tompkins-Stange, 2016). They are right, but philanthropic sponsorship is only part of the story.

The American education system is complex, segmented, and replete with principal-agent problems. Bill Gates cannot run charter schools himself, nor can Eli Broad personally administer his academy for reform-minded superintendents. Gates, Broad, and their respective foundations, must rely on sympathetic agents within the extant system to implement their preferences for greater school choice and accountability and more data-driven and exacting personnel management. Unless philanthropists can identify and connect with embedded agents that share their agenda, their money will not buy change. Longitudinal polling data shows strong and enduring majorities of teachers oppose charter schools, merit pay, and tenure reform²⁰. Teachers unions are likewise opposed to many of the policy measures that comprise the reform agenda (American Federation of Teachers, 2017; Finger, 2018a; Hartney & Flavin, 2011; Moe, 2011; Rosales, 2017). As Hess observes:

Principals, superintendents, and school-district officials inhabit a highly politicised space, where the benefits of bold action are frequently dwarfed by the costs of angering key constituencies. For all the eager talk of teacher evaluation, school turnarounds, charter schooling and much else, the reform agenda has not sufficed to alter that dynamic. This means its success is dependent upon leaders eager and equipped to leverage new opportunities and run the accompanying risks, but our education system is not well suited to producing or attracting such leaders (2013, p. 25)

²⁰ *Education Next* conducts an annual survey to gauge the views of the general public and the teaching profession on a range of education policy issues. Since 2013, the earliest year for which comparable data is available, the survey has consistently found that majorities of teachers oppose charter schooling, performance pay, and the erosion of teacher tenure. Around half of surveyed teachers oppose mandatory annual testing of maths and reading proficiency for students in grades 3 to 8 (<https://www.educationnext.org/ednext-poll>). A recent nationally representative survey of US teachers found that 56% of all teachers oppose charter schools, rising to 70% among unionised teachers (Educators for Excellence, 2018). Several studies likewise find intense teacher union opposition to performance pay (Ballou, 2001; Ballou & Podgursky, 1993; Goldhaber et al., 2011, 2008; Peterson et al., 2014)

In short, the ‘education establishment’ was not going to do the bidding of reformist philanthropists, irrespective of how much money was on the table (Greene, 2015).

By contrast, the preferences of TFA staff, corps, and alumni, though by no means homogenous, often align with the reform agenda advanced by the new edu-philanthropists. TFA believes that ‘ending educational inequality’ depends above all on improving the quality of the teaching profession (Smith, 2005; Teach for America, 2019d). The organisation selects for high achievers and encourages its participants to use data-informed teaching methods. Consequently, TFA corps members and alumni often support test-based teacher evaluations and revisions to compensation structures that reward performance on standardised metrics (Brewer, 2014; DiCarlo, 2012; Fryer & Dobbie, 2015; Scott et al., 2016; Trujillo & Scott, 2014). From the outset, TFA was critical of the overall quality of traditional teacher education programs and a strong advocate for the liberalisation of teacher certification and training (Kopp, 1992). TFA types also tend to support market-driven education reforms, such as charter schooling, because these reforms permit school leaders to implement more flexible labour agreements, liberalise restrictions on teacher recruitment and dismissal, and extend the school day and year (Kamenetz & Westerfelt, 2014; Kopp & Farr, 2012). Moreover, TFA explicitly exhorts its participants to be ‘leaders for change’ (Trujillo & Scott, 2014). In short, Teach for America offered reformist philanthropists something to work with *inside* a system that had largely resisted past attempts at plutocratic remodelling (Greene, 2015).

The ‘Neo-Liberal’ Zeitgeist

Ever since *A Nation At Risk* lamented the ‘rising tide of mediocrity’ eroding ‘the educational foundations of American society’ ‘neoliberal’ (i.e. free market and new public

management) prescriptions for school reform have been in the ascendency among political elites (National Commission on Excellence in Education, 1983, p. 7). As Chapter 2 related, the landmark 1983 report galvanised public concern about the underperformance of the American education system, and in particular, its deleterious effects on the nation's economic competitiveness (Goldstein, 2015; Schneider, 2011). Reforms mandating state- and nation-wide academic standards and assessments were increasingly touted by state governors and business leaders throughout the 1980s and 90s (Mehta, 2013). Likewise, following the passage of the first charter school law in Minnesota in 1991, proposals to increase choice and competition among providers diffused at the state level throughout the 90s and 00s, and attracted bi-partisan support federally (Mintrom, 1997; Verger et al., 2016). This late twentieth century 'neoliberal' consensus found its most prominent expression in the *No Child Left Behind Act*, though the same constitutive ideas can be found in Clinton's *Goals 2000: Educate America Act*, George H. W. Bush's *America 2000*, and indeed Obama's *Race to the Top* and *Every Student Succeeds Act* (Schneider, 2018). But while this technocratic, neoliberal logic of reform has had an enduring appeal among a broad spectrum of policymaking, media, and business elites it has *never* been embraced by the groups at the heart of the K-12 education system (Mehta, 2013; Moe, 2011).

Despite a growing disjuncture between the preferences of teachers' unions and those of elite Democratic office holders, most analyses of recent decades have nevertheless tended to 'view school reform primarily in terms of...“horizontal politics”... i.e. that a centrist coalition triumphed over the objections of left and right.' But as Mehta notes, we really ought to be looking at the 'vertical politics' of education systems. The key cleavage during the long neoliberal interregnum concerns *institutional position* more than ideology; it is top-

versus-bottom or outsiders-versus-sub-system insiders, rather than left-versus-right (2013, p. 35). Just as philanthropic patrons require amenable agents to do their bidding *inside* the education sub-system, so too do top-down policymakers. Neoliberal reform never found a sympathetic audience among teachers, their unions, and other professional allies. And while sub-system agents may not have been able to prevent the *passage* of reforms through state and federal legislatures, they have exercised their considerable bureaucratic discretion and organisational power at lower levels of administration to frustrate implementation and denude intended impacts.

The fate of NCLB's standards-based accountability agenda is highly instructive here. As Hess and McShane observe, both Bush- and Obama-era officials 'dramatically underestimated' how difficult it would be to make this rather crude top-down model of accountability work and 'how tempting it would be for schools, districts, and states to subvert [it]' (2018, p. 33). Hence, while NCLB marked 'the reform movement's most spectacular political victory' inasmuch as it passed a 'coherent policy package intended to reform the entire system of American education,' it has turned out to be the 'biggest disappointment by orders of magnitude' because it failed to anticipate how vested interests would respond to the particular combination of 'carrots' and 'sticks' (Moe, 2015, p. 315).

Most state-level reforms aimed at instituting more rigorous teacher evaluations have had similarly sobering results, as Chapter 2 detailed. Because school districts and principals are ultimately responsible for administering evaluations on a day-to-day basis, state-imposed mandates can only go so far in ensuring rigorous and objective implementation (Walsh et al., 2017). As Hess cautions, 'legislators can change evaluation policies but

cannot force [school] principals to apply them rigorously' (2013, p. 22). In other words, bottom-up agent culture tends to eat top-down policy for breakfast.

The correct conclusion to draw from this state of affairs is not that school and teacher accountability can never work, but that it relies to a great degree on the *discretionary compliance of intermediary agents*. Evidence from Washington DC demonstrates that teacher evaluations can boost system performance if they are *implemented and overseen by sympathetic and uncompromising agents*. In 2009 DC introduced IMPACT, an evaluation scheme which linked clear professional incentives to multiple measures of teacher performance (including multiple observational measures by school and system leaders and student performance on tests). Teachers who received a low rating three years in a row were liable to be dismissed, whereas teachers who received a highly effective rating received salary increases. Dee and Wyckoff (2013) show that teachers who were rated just below the “effective” and “highly effective” thresholds improved by large amounts the following year. Moreover, in the three years after IMPACT’s introduction, 15% of the lowest performing teachers left the DC system and were replaced with more effective teachers. That IMPACT was developed and introduced by Michelle Rhee and a coterie of other TFA alumni, into a system replete with TFA-trained school leaders and teachers, is probably no coincidence.

Similarly, state and federal action to permit and incentivise charter schooling and alternative teacher certification only results in concrete change if sub-system agents avail themselves of opportunities to innovate. In recent decades, the education has not always been strong enough to stop legal changes, but it was hardly going to *abet* the spread of non-traditional approaches through their discretionary behaviour. *Legal* change of this

sort only results in *institutional* change when it connects with agents willing to do things differently (Culpepper, 2005). As Chapter 2 related, the growth of the charter sector in the United States has significantly lagged behind the passage of charter school legislation because it takes time to develop a sizeable network of frontline agents capable of building schools and fending off anti-charter attacks.

Finally, neoliberal ideas about reform needed ‘proof points’ if they were to endure. Policymakers needed to be able to point to examples of thriving charter school networks and successful alternative certification programs in order to justify the continuance and further expansion of these policies. ‘What is new here’ reflected Mehta and Teles in 2012, ‘is not the idea of attacking the traditional system; the attack on the “educational establishment” goes back at least to William Bennett in the 1980s...What is different now is that there is a set of interlinked organisations, across a variety of dimensions of the school system, that have track records, clear political asks, and the energy and capacity to expand if funded’ (2012, p. 12).

In short, the education sub-system is very good at insulating against top-down change that cuts across the aggregate interests of professional groups. Neoliberal ideas, though undoubtedly dominant at elite levels, needed *vectors* inside the system with access to the real levers of change. Teach For America has given the reform movement a bevy of founders and leaders for new charter schools, the architects of numerous alternative certification programs, and principals and superintendents capable of instituting and administering teacher evaluation schemes and other data-informed practices with rigor and fealty, *because they believe in the reform mission*. Without these agents on the ground, many

of the objectives of top-down policymakers and philanthropists could simply not have been realised to the degree that they have.

Waning Union Power

While the extent of teachers' union power within the American education system is hotly debated, there is broad consensus across the literature that unions are not as dominant as they once were, and their influence, especially over federal policymaking, has waned (Moe, 2017; Strauss, 2018). Several explanations are offered for the recent decline in union predominance. Education policymaking, once the near exclusive preserve of local and state school boards, has, over the past fifty years, increasingly been taken up by general purpose institutions – city halls, state legislatures and governors' mansions, Congress and the Oval Office (Henig, 2013; Wong & Shen, 2007). Whereas the teachers' unions are the best resourced and most concentrated interest group in most school board elections (Anzia, 2013)²¹, they are just one of many interest groups competing for attention and favour in mayoral, gubernatorial, congressional, and presidential elections (Henig & Lyon, 2019; Moe, 2015). In short, the shift away from 'single purpose' decision making bodies has diminished union influence over education policymaking somewhat. Unions have also been weakened by the rise of a reformist wing in the Democratic Party in the past decade or so. While most Democratic office holders, especially at the sub-national level, continue to be reliable legislative allies for the teachers' unions (Finger, 2018b), a sizeable group within the party has endorsed and prosecuted choice and accountability reforms that teachers' unions oppose (Moe, 2019). The legacies of Barack Obama, Arne

²¹ For instance, the 2018 *EducationNext* Poll asked a nationally representative sample of teachers and the general public the following question: 'Do you remember for sure whether you voted in the last school board election?' 58% of unionized public school teachers responded that they had voted, compared with only 26% of parents and 33% of the general public (Cheng et al., 2018a)

Duncan, and Cory Booker are notable examples of this shift. Changes in Democratic party opinion reflect a longer running trend that has seen education become a more electorally salient issue and public opinion on questions of education reform shear away from union positions since the late '80s (Mcguinn, 2012b; Peterson et al., 2014; Shapiro et al., 2016; Wolbrecht & Hartney, 2014). Over a similar time frame, the American public has become more inclined to agree that teachers' unions are a net negative influence on the education system (Loveless, 2000; Peterson et al., 2014).

Since the early 1980s, after *A Nation At Risk* kicked off a national panic about educational standards, teachers' unions have been assailed by attempts to reform the system. While unions have managed to rebuff or denude much of the past three decade's top-down push for reform, they have had to expend considerable resources to do so (Kahlenberg, 2017). At the same time, Republican legislatures in a few states – most notably Wisconsin – have passed laws that restrict the ability of unions to amass resources. Right to work laws, bans on agency fees, and restrictions on the scope of collective bargaining have diminished membership and revenue, and with that, the influence unions can exert over policymaking. Between 1999 and 2012 state-level teacher union membership declined on average by 5%; though in states with some of the highest K-12 student enrolments, such as Pennsylvania, California, Illinois, and New York, union membership has been largely stable, and remains high (between 91 and 97 percent of the total teacher workforce) (National Center for Education Statistics, 2019). The June 2018 decision of the Supreme Court in *Janus vs AFSCME* to ban public sector unions from collecting agency fees from non-members, is, however, expected to reduce membership and

finances nationally, and with it unions' political clout (Nittler, 2018)²². Notwithstanding all of these developments, unions have remained a dominant force in *district level* politics. In most school districts of the United States, unions retain collective bargaining rights and continue to be the most active and influential groups in school board elections (Anzia, 2013; Hess & Leal, 2005). Because, in most places, districts remain sovereign over many of the key decisions affecting the day to day operations of schools – the rules governing teacher wages, working hours, the assignment and transfer of teachers, the conduct of teacher evaluations, the allocation of school resources, and so on (Nittler, 2018) – teachers' unions have continued to be a powerful force for stability in the American school system overall.

Yet, even if unions are no longer the '500 pound gorillas of legislative politics' (Moe, 2001, p. 44) that they might once have been, it still requires reformist agents on the ground to exploit the opportunity that diminished union strength affords. Weaker unions and less Democratic party fealty to union positions may permit the *legislation* of choice and accountability reforms, but as explained above, structural change in American education very much depends on the *behaviour of front-line agents* to make it a reality.

The case of New Orleans is instructive here. When Hurricane Katrina hit New Orleans in late August 2005, it destroyed much of the physical infrastructure of city's education system. It also 'eviscerated the local vested interests' that had held sway over a failing system (Moe, 2019, p. 7). In a recent study, Terry Moe argues that pre- and post-Katrina New Orleans constitutes a sort of 'natural experiment.' In wiping out the vested interests,

²² Interestingly, despite predictions that the Supreme Court's *Janus* ruling would lead many members to drop out of unions, as at December 2018, membership remained steady, and had actually increased in some places. (Barrett & Greene, 2018)

the hurricane produced an uncommonly stark variation in the power structure, which allows us to see the change that is possible when the constraints of union power are lifted. In the wake of the storm, the state of Louisiana took over all but a handful of the city's schools and turned over their management to charter organisations. Today, over 95% of New Orleans students are enrolled in non-unionised charter schools that families choose through a single, city-wide application process. Decisions over teachers, curriculum, timetables, salaries, and the allocation of resources are made at the school level, and all schools and teachers are subject to accountability requirements. As Moe notes, 'the system has its critics' but few demur that New Orleans has undergone a dramatic transformation (2019, p. 9).

Moe is certainly right that Katrina created a vacuum where once an entrenched alliance of the teachers' union, local Democrats, and the Orleans Parish School Board had dominated. But the story of New Orleans is also remarkable for the network of reformers that moved into this power vacuum. A crucial early step was the founding of New Schools for New Orleans (NSNO) by Sarah Usdin, a former TFA teacher in the city who had become TFA's regional executive director. NSNO became the hub of the new system, providing support to new charter schools, and recruiting experienced charter organisations such as the KIPP network (founded by TFA alums, Mike Feinberg and Dave Levin) to the city. NSNO also partnered with Teach for America and the New Teacher Project (a TFA spin-off) to massively increase the number of recruits being sent to New Orleans. New Leaders for New Schools, a New York based organisation, was recruited to lend its expertise in identifying and training talented school leaders. Large philanthropic foundations, such as Walton, Gates, and Broad, stepped in to fund brand new schools (Moe, 2019).

In short, the removal of vested interests, in and of itself, does not wholly explain the dramatic changes in New Orleans. We can never know for sure, but had Hurricane Katrina hit Louisiana in 1995, rather than ten years later, it is very unlikely that the reconstituted school system would have taken the form that it has. Quite simply, a decade earlier, very few of the organisations credited with implementing the dramatic changes in the system existed, or if they did, they were in such a nascent state that leading the reconstruction of a devastated large urban school system would have been unfathomable.

As Hess notes, in the mid-1990s:

There weren't tens of thousands of Teach for American alumni... There was no NewSchools Venture Fund [started by TFA co-founder Kim Smith in 1998], Charter School Growth Fund [founded in 2006, now led by early TFA staffer, Kevin Hall], New Teacher Project [spun-off from TFA by alumna Michelle Rhee in 1997]... New Leaders for New Schools [co-founded by TFA alumnus Michael Johnston in 2000], Relay School of Graduate Education [co-founded by TFA alums Mike Feinberg and Dave Levin], Democrats for Education Reform [co-founded by early TFA staffer Whitney Tilson in 2008]... or Educators4Excellence [founded by TFA alums]. There was one nascent KIPP school. (2017, p. 23)

Ten years before Katrina, there was nothing approaching the wide and deep national network of funders, charter operators, policy wonks, school leaders and teachers, that flocked to New Orleans from 2005 onwards. In short, the case of New Orleans is significant for the actors that *came into the system*, not just the vested interests that left it. Diminished union power may loosen constraints, but it *does not create* the organisations and networks of agents required to realise reform on the ground. To understand how this network came into being we need to understand, among other things, how Teach for America – the progenitor of so much reform activity – found a foothold in a system so putatively unreceptive to change.

The Importance of Agents

In short, philanthropic giving, neoliberal ideas, and diminished union power created favourable conditions for reformers to make headway. But these factors do not address the question of *agency* that is central to institutional change in complex sub-systems. They are necessary but not sufficient explanations. TFA provided a crucial cadre of embedded agents who could use their discretion to take advantage of propitious conditions throughout the late 90s and 00s to concretely realise changes in practice on the ground. TFA was by no means alone in providing this, but it was the first, largest, and most prominent source of systemically embedded reformers, and it therefore warrants our attention. Of course, it is distinctly possible that if TFA had not come along to provide amenable agents some other organisation might have. Moreover, others have followed where TFA led. But the point is that *some entity* had to cultivate amenable agents if reform was going to penetrate at the ground level. And because TFA got there first, and is the best known and unequivocally biggest pipeline of change agents, it demands investigation.

The concept of *subversive action* provides a compelling explanation for the success of TFA and the broader movement it has enabled and sustained. There is no doubt that philanthropic support and neoliberal hegemony among America's policymaking elites has assisted TFA a great deal. It certainly helps to have money and to swim with the tide of elite opinion. But for TFA to succeed in infiltrating the education system, it needed to garner not the just support of economic and political titans, but the *forbearance of system insiders*. TFA needed the incumbent powers that wield veto power over who can and cannot work in a public school to allow them in. How did TFA secure the toleration of incumbents? Surely the teachers' unions would not have countenanced TFA's infiltration and diffusion had they anticipated its ultimate impact?

Teachers' unions have now, and had then, the capacity to thwart TFA if they had been inclined to. In recent years, teachers' unions and their allies have orchestrated expulsions of TFA from certain districts, run successful anti-TFA campaigns on college campuses, and generally made life much more difficult for the organisation because it has come to be recognised as a vehicle for reforms that unions oppose. Had unions foreseen in the early 1990s what they know now about TFA's capacities to affect change, it is very unlikely that they would have been so indifferent to the organisation. Moreover, if TFA's success has simply been a story of a challenger organisation capitalising on the dwindling power of incumbents, we would expect the pattern of TFA's entry and expansion throughout the system to correspond closely to measures of union strength. In other words, TFA would have started out in districts where weak unions were unable to repel a potential threat. But that is not the case. Some of the first TFA operations were in New York City and Los Angeles, homes to powerful teachers unions today, and even more so in the early 1990s.

A subversive explanation can account for the apparent puzzle of TFA being permitted to infiltrate a system it would go on to substantially disrupt. Given the modest origins of TFA and its initially small scale, it is distinctly plausible that the organisation escaped the concern of many would be opponents, or was simply disregarded as a minor experiment in teacher recruitment, unlikely to amount to much. On the available information, there was not much cause for incumbents to worry about TFA in its early years. TFA was left alone to quietly diffuse through the system. As the organisation grew, it turned out more and more agents for reform, but it took some time for their impact to materialise and for unions and other vested interests to appreciate that TFA posed a threat to traditional

structures. It would seem that once that realisation dawned, unions and their allies have taken a much more hostile approach towards Teach for America.

The ensuing chapters provide an account of TFA's inception and burgeoning influence, in order to confirm whether or not the following propositions are sustained by the empirical record:

- First, that TFA succeeded in seeding the education sub-system with change agents because it followed a *subversive* mode of change-making, congruent with the model outlined above;
- Second, that in providing a significant corps of 'ideologically amenable' agents at the heart of the education sub-system TFA contributed a largely new, distinctive, and substantial element to the reform movement, making possible changes that would otherwise have foundered for want of sympathetic agents.

Conclusion

In summary, the discretionary behaviour of sub-system agents is a major determinant of stability and change in many policy sub-systems. Where sub-systems are dominated by groups vested in the status quo, top-down change can be substantially frustrated by agent intransigence. If, on the other hand, sub-systems can be infiltrated by a cadre of agents who are sympathetic to reform, change is possible, notwithstanding the opposition of incumbent groups. Pro-reform agents – *subversives* – can infiltrate otherwise well defended systems when incumbent groups have imperfect information about subversive preferences and capacities. If incumbents fail to anticipate the long-run disruptive potential of subversive organisations, subversive agents are well positioned to cumulatively instigate change through the layering of innovations and the capture of key institutional posts.

This thesis contends that Teach for America operated as a subversive organisation within the American education system, and in so doing, has significantly abetted the realisation of a reform agenda opposed by the ‘education establishment’. While support for reform among philanthropic and policymaking elites and diminished union power were necessary – or at least propitious – conditions for change, they do not resolve the fundamental problem of *agency* in realising concrete shifts in practices and structures. As Rick Hess notes, ‘rewriting policy constitutes only half of a reform agenda. It is equally vital to produce leaders willing and able to leverage new opportunities and to support them as they do so’ (F. M. Hess, 2013, p. 45). The ensuing empirical chapters show that Teach for America sought to perform this function, and succeeded in this endeavour because it took incumbents by surprise. In short, Teach for America *subverted* the system.

4. Foundation and Infiltration: The Early Development of Teach for America, 1989-1999

This chapter investigates the early development of Teach for America – from the conception of the organisation in Wendy Kopp’s 1989 undergraduate thesis, to the realisation roughly ten years later of a solvent and stable venture operating in a disparate set of 15 urban and rural regions, across 13 states.²³ Existing accounts of TFA’s inception have tended to bestow a degree of ‘manifest destiny’ on the organisation and its founder. Schneider describes TFA as ‘a powerful idea at the right time’ (2011, p. 87), while Kopp herself reflected that the ‘laws of the universe’ were seemingly ‘suspended to make way for it’ (Kopp, 2011, p. 48). Yet as Walker notes, ‘it is extraordinarily difficult and expensive to create organisations; it takes time, money, boldness and generally an angel or two’ (1983, p. 398). Why, for instance, were senior corporate and philanthropic leaders willing to invest in Kopp’s quixotic proposal? Why were superintendents and principals prepared to employ uncertified and inexperienced TFA corps members? And why did unions largely countenance a venture that, among other things, threatened to undermine the push to professionalise the teacher workforce? Moreover, would these powerful interests have tolerated TFA’s establishment if they could have foreseen the disruptive force that TFA would, in time, become? In the ensuing sections I endeavour to answer these questions by interrogating the opportunity structure and resources that TFA successfully exploited to gain a secure foothold in a system so often characterised as resistant to change and hostile to change-makers.

²³ TFA placed its first corps members in 1990 in school districts in New Orleans and Baton Rouge, Louisiana; rural Georgia; Eastern North Carolina; New York City; and Los Angeles. In 1991 the program expanded to the Bay Area, the Mississippi Delta, (taking in schools in both Arkansas and Mississippi); and Houston and the Rio Grande Valley in Texas. Further expansions to Washington DC and Greater Newark, New Jersey, followed in 1992 and 1993 respectively. In 1994 the program moved into Phoenix, Arizona and Seattle, Washington, but the latter site was short-lived. Both the Seattle and rural Georgia sites were discontinued in 1995 because of insufficient demand for teachers. Operations in Georgia were relaunched in Atlanta in 2000 and in Seattle in 2011.

The following sections briefly canvas the policy and political context out of which TFA emerged, before examining the factors that permitted and assisted the organisation's establishment and early growth. In short, I find that TFA gained entry to the system because it identified a largely uncontested gap in educational provision. TFA promised to address chronic shortages of teachers in schools serving poor and minority communities at a time of heightened national anxiety about schooling standards. To corporate and philanthropic donors, TFA was a compelling response to a widely perceived crisis in American education. To superintendents and principals contending with chronic staffing problems, TFA was a scheme worth trying. Teachers' unions were broadly acquiescent towards the young organisation because they recognised the imperative to fill long-run vacancies, TFA corps members would join union ranks, and the organisation professed no explicit ambition to orchestrate policy changes that were contrary to union interests. TFA's major adversaries in the early years were education professors at traditional teachers' colleges, but these actors exercised little influence over the staffing decisions of individual superintendents and principals.

Whereas the TFA of the 2000s increasingly touted itself as a pipeline of education system reformers, the TFA of the early 90s made no such claim. Though Kopp would later maintain that she had always anticipated that TFA could become a 'movement' for systemic change, this expectation was not articulated in any of TFA's early publications, nor was it anticipated by other actors in the system at the time. Very few observers would have predicted that the contingent start-up organisation of the '90s would in the ensuing decades mature into a disruptive juggernaut. Nevertheless, the rudiments of an influential nexus of reform leaders were present from the very start. By fostering a network of

carefully selected high achievers from mostly elite backgrounds and exposing them to the shortcomings of the US education system, the foundations of ‘one of the most successful efforts at social entrepreneurship in recent history’ were laid (D. Labaree, 2010, p. 48).

In short, while TFA – like most start-up organisations – battled financial precarity, trenchant detractors, and other headwinds, the prevailing conditions were broadly favourable. By 1989 many states had created alternative pathways into teaching that TFA was able to exploit, and the highly decentralised structure of American education governance created a multitude of potential footholds in the system. For TFA to get a start, only a handful of superintendents and principals needed to take a chance on the organisation. In a nation of some 14,000 school districts, the odds were good. Additionally, a recession in the early 1990s created a tough job market for graduates, which further leavened the appeal of Teach for America’s fusion of altruism and ambition. Most crucially, though, had powerful incumbent groups recognised at the time that TFA might pose a long-term threat to their interests, then the entire story would likely have been very different. By appearing – wittingly or otherwise – as nothing more complicated or threatening than a boutique national service organisation responding to chronic teacher shortages, TFA laid a foundation for potent subversive action in the long run.

Historical Context and Antecedents of Teach for America

While Teach for America was an audacious proposal, it did not emerge out of a vacuum. Readers of Kopp’s undergraduate thesis will discern a strong coherence with the broad tenets of the education reform movement that began to emerge in the United States during the 1980s. Equally, alternative routes and other schemes to induce top graduates into teaching significantly pre-dated TFA. Critically, however, Kopp had the elite

connections, and follow-through to stitch these components together into a coherent and compelling proposal.

Kopp's vision for the 'Teacher Corps' (as TFA was first known) came on the heels of a nearly a decade of handwringing from federal and state governments and the corporate sector about the state of America's schools. Since the publication of *A Nation At Risk* at the beginning of the decade, the 1980s had seen an outpouring of elite concern about the state of America's schools. Cover stories in *BusinessWeek* and *Fortune* magazine decried a growing skills deficit, corporate giving to school education was increasing, and business leaders were playing prominent roles in various states' reform efforts, particularly in the South, where a handful of self-declared 'education governors' stressed the importance of school improvement to future economic prosperity (Erich, 1988; Fuhrman & McDonald, 1986; Perry, 1989; Weber, 1988).

Kopp's 1989 thesis, entitled 'An Argument and a Plan for the Creation of the Teacher Corps,' echoed elite concerns about the incompetence of school leavers and America's growing 'educational deficit' (Kopp, 1989, pp. 4–8). Just as *A Nation At Risk* had ultimately found cause for optimism in the determination of the American public – once apprised of the problem's gravity – to redress the sorry state of affairs, Kopp likewise drew inspiration from the idealism and 'rising spirit of volunteerism' she perceived among her peers at Princeton and other elite colleges (Kopp, 1989, p. 9; National Commission on Excellence in Education, 1983, p. 16). Whereas *A Nation At Risk* recommended the 'immediate' deployment of graduates in mathematics and science to meet an acute shortage of teachers, Kopp's thesis fleshed out a model by which this could be accomplished (Kopp, 1989; National Commission on Excellence in Education, 1983, p. 31).

In other eras, a twenty-something's scheme to recruit college graduates to teach in America's neediest schools might have struggled to garner support. But Kopp found that heightened corporate concern about educational standards could be readily converted into financial backing for her vision. With seed funding and in-kind support from blue chip companies such as Union Carbide, Mobil, and Morgan Stanley, TFA began recruiting in December 1989 and placed its first 500-odd teachers in classrooms in Los Angeles, New York City, and the rural South in 1990. Kopp's confidence and facility in approaching corporate patrons was not coincidental. At Princeton, she had led a group called the Foundation for Student Communication which facilitated networking events between students and corporate CEOs. Whitney Tilson, a founding TFA staffer, goes so far as to suggest that Kopp was 'probably the only graduating senior in the country who could have pulled this off':

Very critically, she led a group at Princeton... she had a rolodex...She had access to the CEOs of major companies and that was absolutely instrumental...She was able to mine that rolodex and they gave us some of the critical seed funding (Tilson, *Interview*, 2017).

As Kopp told the *New York Times* in June 1990: 'Everything I do is based on that experience... I realized there's an incredible amount of money in the world and people who are looking for good things to support, and if you can just get in the door you can have a good chance of making it fly' (quoted in Chira, 1990).

Corporate donors were attracted to TFA because it was a beguilingly straightforward solution to a complex problem – 'a simple and brilliant idea,' in the estimations of Philip Morris' then vice president for corporate contributions, Stephanie French (cited in Marriott, 1992). As education historian Patrick McGuinn observes, TFA was palatable 'because it addressed educational inequality without having to take any more radical and

unpopular steps,’ such as raising taxes or redistributing school funding (McGuinn, *Interview*, 2017). Fellow historian, Diane Ravitch echoes this assessment: ‘[corporate donors] saw it as innocent do-good work, non-controversial and appealing. She talks their talk...’ (*Interview*, 2017). Daniel Oscar, Kopp’s first hire at TFA, further speculates that the idea of putting the best and brightest into under-served schools made intuitive sense to business leaders because ‘it appealed to their own sense of themselves.’ ‘These were elite people who had been super successful in business and [they imagined that] if they as twenty-two-year-olds had gone into teaching, they could have cleaned and fixed the whole thing’ (2017, *Interview*).

Kopp’s model for TFA had obvious (and openly acknowledged) forerunners, among them the Johnson-era National Teacher Corps which had endeavoured to improve outcomes in underserved urban schools by fostering teachers with an understanding of race- and class-based differences (Kopp, 1989, p. 1). Unlike TFA, however, the National Teacher Corps was a federally funded and administered program and its participants did not necessarily have elite educational backgrounds. Without adequate political support, this program had petered out during the Reagan administration. Kopp drew several lessons from the fate of the Teacher Corps about the bureaucratic and political limitations for constituting TFA as a government entity. Cultivating public sector and political patrons would be important, she felt, but being a government program primarily reliant on federal funding, particularly ‘at a time when the federal government [was] seeking to cut expenditures and other sectors of the economy [were] willing to support education’ would be a mistake (Kopp, 1989, p. 110). Firstly, as an independent non-profit organisation TFA would not be ‘subject to the whim of the administration in power’ and could better maintain a non-partisan image which would appeal to ‘mainstream America.’ Secondly,

as a non-government entity working in the education arena, TFA would be less likely to provoke hostility from local and state actors, than an arm of the federal government. Thirdly, it was Kopp's view that 'being a free-standing autonomous organisation [would allow] for greater visibility, *esprit de corps*, and flexibility' (1989, p. 109).

The advent of TFA also followed the introduction of alternative teacher certification schemes in several states during the 1980s, as governments sought to recruit potential teachers who were deterred from teaching by the standard certification requirements. For instance, New Jersey's Provisional Teacher Program, instituted in 1985, allowed individuals with a bachelor's degree in any discipline to take up teaching provided they passed a state-mandated test and completed a training program during their first year on the job (Schneider, 2011). Programs of this ilk forged a regulatory pathway for TFA, absolving the nascent organisation of the difficult and protracted challenge of securing legislative changes before its corps members could enter classrooms. The TFA model differed, however, from existing state-administered schemes in specifically recruiting teachers with disciplinary specialisms and elite educational backgrounds for the highest-needs schools.

Finally, the idea of promoting teaching as a limited period of service in order to attract higher calibre candidates had also been ventured before. Ernest Boyer, the former US Commissioner of Education floated the notion in the mid 1980s: 'Outstanding young people might agree...that they will devote three years to teaching science or math such as they might serve in the Peace Corps...I'd rather see good people teaching for short periods, than third- and fourth-rate people there for a lifetime' (cited in Bell, 1985, pp. 442–443). In sum, TFA was not conjured from whole cloth. It was, rather, a scheme that

pieced together parts of past and present programs and, critically, was an idea that resonated with the ‘national conversation’ about education reform (Schneider, 2011). The TFA model was novel and ambitious enough to garner interest and excitement from key quarters, but comprised of sufficiently familiar elements that most incumbent interests did not balk at it. The following sections elucidate the opportunity structure and resources that permitted Kopp and her team to ‘stitch together’ the idea of TFA into a viable and enduring program by the end of the 1990s.

A Niche on the Neglected Peripheries of the Education System

A solution to an intractable problem

Teach for America was initially conceived of and explicitly presented as a response to acute teacher shortages in poor urban and rural schools (Kopp, 1989, 2001a). Kopp’s thesis – the most comprehensive early enunciation of TFA’s objectives, specified the following goals for the organisation:

- 1) To help solve teacher shortages;
- 2) To focus positive attention on the education system and on the profession of teaching;
- 3) To attract the best and brightest to teach;
- 4) To provide the opportunity for a group of teachers who would not otherwise teach to do so (1989, p. 109)

Creating a ‘movement’ of leaders for education reform was not entertained in the thesis, nor in the promotional materials that TFA disseminated to recruit the first corps. Rather, TFA promised ‘to attract talented graduating seniors to teach for two years in schools which most need teachers’ (Teach for America, 1989). The proposal proved attractive to many school administrators in the early 1990s because it provided a solution to an otherwise intractable problem.

In the late '80s and early '90s a deficit of qualified teachers in poor urban and rural districts had attracted considerable newspaper coverage and the attention of think tanks and quasi-governmental bodies (Feistritz, 1988; Freedberg, 1988; Haggstrom et al., 1988; M Healy, 1989; Robinson, 1985). Kopp proposed a solution to the widely acknowledged shortages which sought to avoid antagonising incumbent interests. Early iterations of the TFA model were at pains to stress that TFA corps members would not supplant, nor claim equivalency to, certified and traditionally trained teachers:

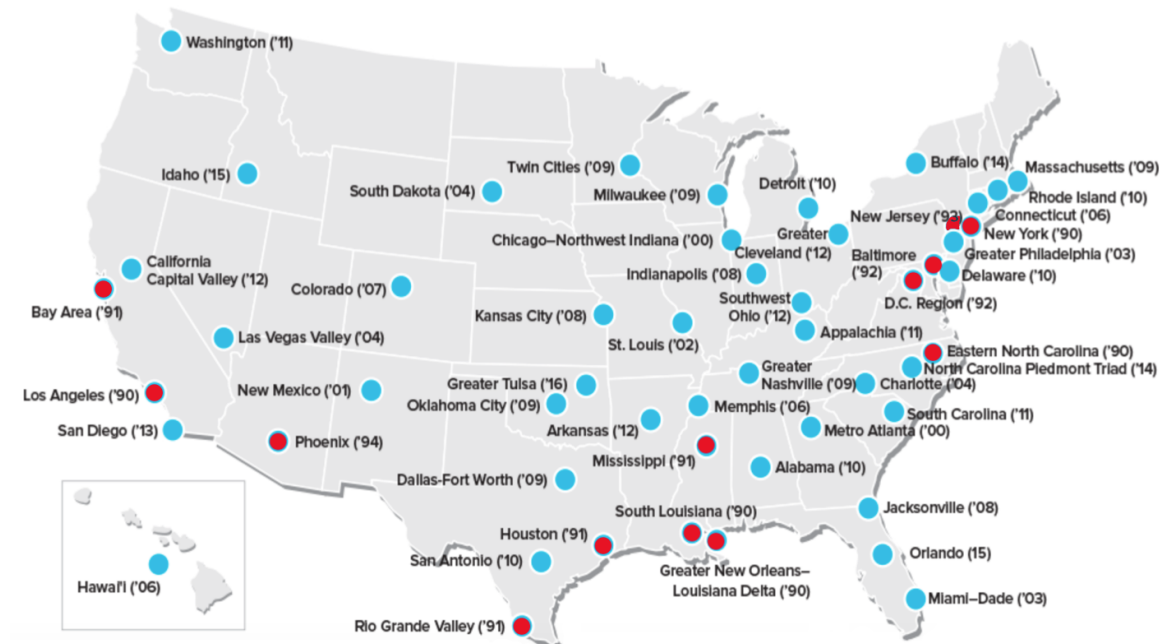
‘the Teacher Corps [as TFA was first known] permits its members to teach only for two years, and to do so only in areas for which certified teachers are unavailable. Furthermore, chances are that without the Teacher Corps, schools would have to hire candidates who are not only less academically able, but also have even less formal training and a less developed support mechanism’ (Kopp, 1989, p. 49)

Indeed, early TFA sites in rural Georgia and Seattle were shuttered in 1995 ‘because of a drop in a need for teachers’ in these regions (Teach for America, 1998). It was not until the second decade of TFA’s existence that the organisation began to place corps members into regions with less pronounced shortages, tout its recruits as a superior alternative to conventionally trained and certified novice teachers, and promote its people as catalysts of ‘systemic change’ (Goldstein, 2015; Kopp & Farr, 2012; Teach for America, 2001a).

Susan Short, the founding TFA staff member responsible for finding placement schools for the first TFA corps, recalls that much of her early work involved cold-calling of superintendents and principals. Less commonly, TFA was approached directly by school administrators, who had learned of the program through their networks and thought it might be a solution to their staffing headaches. Short focussed her efforts on districts with known or presumed shortages on the basis of press reports and referrals from well-connected individuals in education policy circles (Short, *Interview*, 2017). New York City and Los Angeles were immediately targeted as likely sites of operation ‘because they were

the biggest urban systems’ and had much publicised shortages (Kopp, *Interview*, 2017). New Orleans was likewise identified as a potential venue ‘because it was one of the most distressed urban areas in the country.’ Short’s efforts were also trained on sites in the rural South ‘because [TFA] wanted to have a geographic balance and then we wanted some rural communities...and we knew that there would be need there’ (Kopp, *Interview*, 2017). Figure 5, below, depicts the geographic distribution of TFA’s operations from 1990 to the present, with the earliest sites shown in red.

Figure 5: Distribution of Teach for America Regions, 1990-2019



Source: Teach for America, 2018; Modified by the author

While Short and Kopp’s overtures on behalf of TFA were not uniformly welcomed, in many instances, principals’ and superintendents’ reservations about corps members’ inexperience and lack of training were outweighed by a desperation for teachers (Short, *Interview*, 2017). Whitney Tilson recalls that ‘superintendents were willing to take a risk with a new program because their current alternative was a very poor option’:

Go talk to any superintendent off the record, inject them with truth serum, and they’ll tell you that the last few hundred teachers that they’re hiring...they’re

scrambling to fill those last jobs. And keep in mind that TFA corps members not only were willing to, they had specifically signed up to go teach in the South Bronx (*Interview*, 2017).

Tilson's recollection is corroborated by Caesar Previdi, then principal of Martin Luther King High school in New York City, who felt that hiring TFA novices 'would be better than not having anybody' (quoted in Kopp, 1989, p. 122). Sylvia Rousseau, a Los Angeles Unified School District superintendent during the early '90s, likewise brought in TFA recruits because 'the district was desperate for math and science teachers,' and she anticipated that a TFA corps member would be superior to a poorly prepared substitute, or a 'dying on the vine' teacher (quoted in Schneider, 2011, p. 94). Districts in the early '90s did not have well-developed recruiting capacities and struggled to address chronic shortages. 'To superintendents [TFA] was mana from heaven' observes education scholar David Cohen. 'What could they lose?' (2017, *Interview*). In short, by targeting needy districts, in the context of long-run shortages, TFA moved into an uncontested niche in the public education system.

An existing regulatory pathway

With limited time and little capacity to lobby for changes to states' teacher certification laws, TFA confined its early operations to states with existing alternative certification pathways, and/or those states that habitually granted a significant number of emergency licenses for new hires in under-served regions and disciplines (Short, *Interview*, 2017)²⁴.

The fact that many states had by the late '80s relaxed barriers to entry meant that for at

²⁴ Understandings of what constitute an 'alternative certification' program vary, but the most common definition of an alternative route is 'anything other than a four- or five-year undergraduate program in a college or university – a definition that classifies college and university post-baccalaureate teacher-preparation programs as alternative' (Zeichner & Hutchinson, 2008, p. 17). Alternative certification routes permit candidates without a teaching qualification to take charge of a classroom whilst working towards formal certification, usually through the completion of college- or university-based training. By contrast, emergency licenses or certificates authorize individuals without teaching qualifications to teach for a limited period in order to meet otherwise unmet staffing needs. An emergency certificate does not result in full certification, unless the holder undertakes additional training via an alternative certification route.

least its first decade, TFA did not need to challenge the prevailing regulatory regime in order to expand to new jurisdictions.²⁵ The prevalence of alternative certification and emergency licensure in TFA's early years also obviated any direct conflict between the new organisation and interest groups, such as teachers' unions and colleges of education over further erosions to professional entry requirements. By 1990, most states' teachers unions had already reluctantly acquiesced to non-traditional routes into teaching because shortages were so acute, particularly in maths and science, and in challenging urban schools (Fuhrman et al., 1991).

New Jersey was the first state to adopt an alternative certification scheme in the early 1980s. As Table 9, below, shows, in the ensuing decade, most states followed suit and instituted their own streamlined routes into teaching (Grossman & Loeb, 2008). While the specifics of state programs varied, alternative routes to certification generally permitted an individual with a bachelor's degree but no teaching qualifications to take up a position as the classroom teacher of record, whilst they worked towards standard certification, most commonly by undertaking training at a local college or university (Humphrey & Wechsler, 2008). Additionally, every state had existing provisions to issue emergency teaching permits to untrained individuals when circumstances were thought to merit it. The prevalence of emergency licensure varied considerably between states, as Table 9 shows.

²⁵ As Kopp related in a 1997 article, 'the states in which Teach for America works already waive certification requirements or provide alternative routes to teacher certification' (1997, p. 213). By the '00s, however, teacher shortages had eased somewhat, and states were endeavouring to move away from emergency licensure in favour of more rigorous pathways into teaching. Alternative certification programs proliferated, but, under pressure from federal statutes, states adopted more exacting requirements for certification. As a consequence of these developments, TFA increasingly required waivers or amendments to state certification laws before it could expand to new jurisdictions throughout the '00s and '10s (Kopp & Farr, 2012).

Table 9: Alternative Certification and Emergency Licensure of New Teachers by State, 1989-1993

	Alternative Certification Program in place between 1989 and 1993 ²⁶	No Alternative Certification Program in place between 1989 and 1993
>5% of new hires on non-standard teaching certificates (1987-88 school year) ²⁷	AK, AL, CA , CT, FL, LA , MD , MA, NH, NM, NY , OK, TX , UT, VA WA , WV,	ME, NV
>1% of new hires on non-standard teaching certificates	AZ , AR , CO, DC , GA , IL, IN, KY, MI, MN, MS , MO, MT, NJ , NC , OH, OR, PA, RI, TN, UT, VT, WI	DE, IA, SC,
<1% of new hires on non-standard teaching certificates	HI, ID,	KS, NE, ND, SD, WY

Note: The darkest shaded cells denote states with the most amenable regulatory environment for Teach for America. These are states that had established alternative certification programs *and* had a recent history of hiring a significant number of new teachers on non-standard (i.e. emergency) certificates. Cells shaded a lighter grey denote states where TFA *could* have operated according to state regulation and licensing practices, but the state's willingness to experiment with non-traditional teacher recruitment was less pronounced, probably because teacher shortages were less acute. Finally, the unshaded cells contain states where TFA would have required changes to certification legislation or changes in state practice vis-à-vis emergency licensure, in order to operate. States where TFA established sites of operation in the early 1990s are denoted in bold.

Hence, while time constraints meant that TFA 'needed to work with existing policies and mechanism for hiring teachers,' regulatory barriers did not greatly confine the organisation's options for potential sites of operation (Short, *Interview*, 2017; Smith, *Interview*, 2017). As Table 9 shows, certification regulations and licensing practices in the vast majority of states would have accommodated Teach for America.

A devolved and permeable system

The highly decentralised and devolved structure of American education governance is often invoked as an impediment to broad scale reform. As education historian David

²⁶ Data on alternative certification programs was sourced from Stein (1990) for regulations in 1989 and the American Association for Colleges of Teacher Education (1994) for 1993. These dates (1989 and 1993) were chosen because they bookend the period of TFA's inception and initial growth. After expansions to Seattle, WA and Phoenix, AZ in 1994, TFA did not enter a new jurisdiction until 2000 when the program entered Chicago and re-entered Georgia, this time in Atlanta, rather than a collection of rural districts.

²⁷ 1987-88 was the most proximate year for which data was available. This data was sourced from the US Department of Education, National Center for Education Statistics, Schools and Staffing Survey, 1987-88, (Teacher Demand and Shortage Questionnaires); reproduced in US Department of Education, National Center for Education Statistics, (1993) *Modelling Teacher Supply and Demand, With Commentary*, Washington DC: Department of Education, pp. 22-3.

Labaree observes ‘the local autonomy of districts, schools, and classrooms in the American educational system...has made it hard for reform initiatives to reach the heart of the system where teaching and learning take place, and particularly hard to implement reforms that improve classroom learning’ (2011, p. 12). But for TFA, decentralisation and local autonomy significantly aided the organisation’s establishment and early expansion.

The TFA staff responsible for securing initial partnerships with school districts recall diverse reactions from superintendents and principals: ‘there was a lot of strong opinion about whether this was an appropriate direction to be heading...and concern about whether inexperienced students from leading colleges had any of the right skill set to be effectively teaching’ (Short, *Interview*, 2017). Indeed the superintendent of the San Francisco Unified School District was so forthright in his denunciation of the scheme that he reduced Kopp to tears (Kopp, 2001a, p. 20). In a more centralised and homogenous system, rejections from one or two senior administrators could have scuppered the entire enterprise, but the size and diversity of the US system meant that TFA’s fortunes did not hinge on the judgement of one or two individuals.

In a country of over 14,000 school districts the odds were always favourable that TFA could find a few amenable venues, especially given the teacher shortages that plagued many urban and rural districts at the time (Tilson, *Interview*, 2017). As the inaugural site director for TFA in New York City, Timothy Knowles, related: ‘We targeted places that suffered from an absence of teachers...If I encountered people who didn’t need aspiring teachers, I moved on quickly’ (*Interview*, 2017). There was nothing to be gained in

lobbying reluctant administrators when there was every likelihood that the neighbouring school district would welcome the enthusiastic neophytes that TFA was offering.

Because initial site selection largely turned on the amenability of district administrators and principals, TFA placed its early cohorts in a geographically disparate spread of districts. While the far-flung collection of sites was logistically challenging for the cash-strapped organisation to service, it served TFA's long term agenda well. From the outset, Kopp was determined to develop a program that was 'national in scope, in an attempt to attract the kind of national acclaim and attention that the Peace Corps did in its early days' (Kopp, 1989, p. 115). Though TFA's fortunes did not turn on any single district, some regions were more strategically useful than others in establishing the organisation's early profile. For instance, New York City and Los Angeles – the two largest school systems in the country and plagued by shortages – were home to many potential donors and patrons, and nationally influential media markets. Similarly, the opening of the Washington DC site in 1992 brought TFA's operations into close proximity with the national political establishment, thereby bringing 'a positive platform into being to effect change in education across the country' (Kopp quoted in Sutner, 1992).

TFA's success in identifying a handful of hospitable school districts among thousands of potential venues foreshadowed the difficulties that unions and other opponents of the organisation would later have in trying to arrest the organisation's burgeoning scale and influence. To foster a cadre of leaders for reform, TFA only needed to operate in but a small fraction of the nation's school districts - the sheer number and diversity of which tilted the odds in TFA's favour. By contrast, for TFA's opponents to choke off the pipeline of corps members and alumni, they need to block and sever TFA's relationships with

school districts always and everywhere, which is simply unfeasible (Schneider, *Interview*, 2017). As Terry Moe observes, ‘there are simply too many holes in the dyke, and the unions can’t plug them all of the time’ (*Interview*, 2016).

Navigating incumbent interests

Teach for America and the Teachers’ Unions

While teachers unions would, in time, join education professors in vehemently denouncing TFA, in the early 1990s, local union chapters were largely acquiescent to the organisation. Some union figures expressed reservations about the inexperience of the TFA corps and the potential impact that the program would have on efforts to professionalise the status of teaching. In general, however, most union figures were unperturbed by TFA corps entering school districts because of the program’s limited scale, the fact that it operated exclusively in areas of widely acknowledged educational need, and because TFA teachers nearly always became members of the local NEA (National Education Association) and AFT (American Federation of Teachers) affiliates. Quite simply, the possibility that many TFA alumni would go on to form a cadre of disruptive reformers was far from apparent in the early years of the program.

From the outset, Kopp was alert to the possibility of union opposition to her scheme, but thought that because TFA’s initial operations would be confined to areas of acute shortage and therefore posed no threat to certified teachers’ jobs, union obstruction was unlikely (Kopp, 1989, p. 115). She also took heart from the fact that throughout the ‘80s, unions had generally acquiesced to the introduction of alternative certification schemes and therefore ‘would have neither the capacity nor desire to block [TFA] from operating’ (Kopp, 1989, p. 121). While Kopp’s expectations of peaceable relations with the labour

movement were generally borne out in the early years of TFA, a 1989 letter from the NEA documented the union's instinctive reservations about the program, and presaged later clashes, once TFA started operating in districts where shortages were less apparent:

We have some trouble accepting any short term service corps as occupying a significant role in this country's educational commitment...We feel strongly that the core of this nation's commitment to education must flow from fully prepared, career focused, and professionally oriented persons. Even a suggestion that acceptable levels of expertise could develop in short termers simply doesn't mesh with what those of us in the business know it takes to do the job – much less with what our young people need and deserve (Letter from Sharon P Robinson, NEA Director, to Wendy Kopp, March 9 1989, reproduced in Kopp, 1989, pp. 159–160).

Alive to union concerns, Kopp stressed that TFA would not claim an equivalency between its corps members and conventionally prepared teachers. Rather, TFA would 'bill itself as an emergency response...and would therefore not be telling the nation that its inexperienced members were preferable to, or as qualified as experienced teachers' (Kopp, 1989, p. 50).²⁸ This early deference to formal qualifications and experience would be jettisoned in later years – and would be one of several reasons why union animosity towards TFA grew considerably.

In the early 90s, however, as TFA began to place corps members in the troubled schools of the inner cities and rural South, union opposition was not a major concern. Indeed, TFA had the explicit backing of the most prominent teacher union leader in the country. Albert Shanker, the president of the American Federation of Teachers from 1974 to 1997, was a vocal supporter of the scheme. TFA cohered with Shanker's ambitions to see "only the best and brightest" entering the classroom as well as his conviction that deep subject matter knowledge was an essential component of teacher professionalism (Futrell &

²⁸ The fact that early TFA sites in Georgia and Seattle were shut down in 1995 'because of a drop in the need for teachers' corroborates the fact that TFA was initially focused only on areas that incumbent providers had been unable to serve (Teach for America, 1998)

Shanker, 1985). When Kopp first floated the idea of Teach for America as a college senior, Shanker wrote to her to encourage its realisation (Hechinger, 1989; Kopp, Interview, 2017).

Though Shanker's enthusiasm for TFA was not uniformly shared across the union movement, TFA was nevertheless able to focus its early energies on those districts where union leaders were amenable. Susan Short recalls that local union representatives often attended her meetings with superintendents, and many supported the program as a means of addressing teacher shortages (*Interview, 2017*). Other staff involved in the day-to-day operations of the corps within school districts corroborate Short's recollections. Timothy Knowles, who between 1990 and 1993 oversaw TFA's work in New York City – undoubtedly home to one of the most powerful teachers' unions in the country at the time – recalled no difficulties with the United Federation of Teachers (the NYC affiliate of the AFT):

In the early years there was not push back from organised labour. TFA was not a threat. The teachers in NYC were part of the UFT, receiving union wages, union benefits, growing their ranks – and importantly – paying union dues. I periodically met with UFT leadership, and they only expressed enthusiasm for the endeavour...It was later in the history of TFA...that [it] became a threat to the status quo (*Interview, 2017*).

As Cohen observes, '[the unions] knew there were these vacancies in schools and they were not going to fill them. So, they might rhetorically oppose TFA but it wasn't the top item on their agenda by a long shot' (*Interview, 2017*).

The very modest scale of TFA relative to the overall size of the American teacher workforce was another reason why labour unions were unfazed by the new program. Tilson recalls that 'while Teach for America was very ambitious, coming right out of the box with 500 teachers, that's a drop in the ocean in terms of the number of teachers in

the United States. So obviously, union opposition became a big issue later, but I don't recall it as being a big issue then' (*Interview* 2017). More significant still was the fact that the TFA of the early 1990s was a shoestring operation run by a small group of recent graduates. The financial precariousness of the new organisation and the youth and inexperience of the founders meant that few would have anticipated the force that TFA would become in subsequent decades. As Short notes 'I would never have predicted it would exist in the form it exists today at the time...it was a group of twenty-somethings. And it was hard to know what the long-term commitment of all those involved was at the time' (*Interview*, 2017). Finally, many of the issues that would, in subsequent years, pit TFA-affiliated reformers against unions were just starting to become salient. For instance, charter schooling, an idea endorsed by the then AFT President Al Shanker, was in its infancy, with the first state charter law being passed in Minnesota in 1991. The education policy subsystem had not yet split into the implacably opposed camps that dominated reform debates in the 2000s and 2010s and there was little indication that TFA was at the vanguard of an incipient reform movement (Kahlenberg, 2009). On the information available at the time, few would have predicted the profound influence that TFA alumni would go on to have in the broader policy sphere and in future debates over issues that would become 'bread and butter' union concerns such as charter schooling, high stakes testing, merit pay, and teacher tenure reform (Cohen, *Interview*, 2017; Rubinstein, *Interview*, 2017).

In sum, the unions could stomach the original iteration of TFA because they recognised that acute teacher shortages necessitated schemes of this sort. Faced with a choice between a minimally-trained TFA teacher or another neophyte with no pedagogical training whatsoever, many union leaders could more readily countenance the former.

Quite understandably, given the quixotic and contingent nature of the organisation, the unions did not anticipate that TFA could become a large-scale nursery for education reformers. As Schneider observes, for a long time ‘the unions were saying, “oh TFA’s a drop in the bucket.” They didn’t see that TFA comes with all this other stuff’ (*Interview*, 2017).

Teach for America and the Educationalists

In contrast to the teachers’ unions, professors of education at traditional teachers’ colleges took against TFA from the very beginning. The program was rightly recognised as a threat to the traditional model of college-based training and TFA was denounced for undermining long-run efforts to professionalise teaching. While the enmity of education professors generated some bad press for TFA, it ultimately did not stymie the development of the organisation. Unlike the teachers’ unions, educationalists exercised little influence over school boards’, superintendents’, and principals’ staffing decisions. Furthermore, numerous official and quasi-governmental reports throughout the preceding decades had eroded the public stature and expert legitimacy of traditional teacher education providers by the early 1990s. To many, the educationalists’ condemnation of TFA looked like self-dealing from a discredited quarter.

Perhaps anticipating the reactions of teacher educators to her proposal, Kopp’s 1989 thesis was outwardly deferential to the importance of traditional training and rigorous certification procedures:

‘While [TFA] seeks to provide its members with some training and with the support and supervision of an experienced teacher, it does not profess to give individuals who have only a few months of formal pedagogical training a *standard* certificate. Instead, the Teacher Corps permits its members...to [teach] only in areas for which certified teachers are unavailable. (Kopp, 1989, p. 49).

This conciliatory message did little to assuage prominent education professors, however. 'Most of our critics in the early days were in traditional colleges,' recalls Kim Smith, the founding staff member responsible for devising the summer training program for corps members before they embarked on their two-year assignments. In any case, TFA's deference to traditional training and standard certification was short-lived as the organisation soon recognised that efficient operations and long-term growth depended on the continued expansion of alternative certification practices at the state level. Within a few years of launching TFA, Kopp began to explicitly condemn colleges of education as 'disconnected from the K-12 schools' and 'not in a position to prepare and develop the staff that new schools will demand.' She further lamented that 'schools of education face a status problem that jeopardises their ability to assume the lead role in recruitment, selection and development' and that 'their reputation among college students and the American public impairs their ability to attract our most talented individuals' (1992). Unsurprisingly, TFA soon became 'a program that teacher educators love to hate' (Labaree, 2010, p. 48).

Among the first and most vehement critics were Linda Darling-Hammond and Deborah Appleman, professors of education, at Teachers' College, Columbia University and Carleton College, Minnesota respectively. In articles published in the early 1990s, they excoriated TFA. Their first objection to the program was its 'dangerous naïveté' in presuming that adequate pedagogical knowledge could be acquired via a five-week 'summer intensive' (Darling-Hammond in Lawton, 1991). A second criticism centred on TFA's claims to be recruiting the 'best and brightest' in order to restore the 'downwardly mobile' image of the profession (Kopp, 1989, p. 27). Many conventionally trained teachers felt demeaned by this assertion, while education professors were defensive about

the implication that traditional trainees were academically meagre by comparison (Darling-Hammond, 1994, p. 23). Finally, TFA represented an insidious ‘missionary’ mentality, whereby privileged outsiders with little contextual understanding would inflict their lack of experience on already vulnerable students for two years, before moving on to more prestigious and better paid work (Darling-Hammond, 1994, p. 24).

Darling-Hammond’s scathing attacks – especially her 1994 article in *Phi Delta Kappan* (the journal of record for education sector professionals) damaged TFA’s public standing and sapped staff morale at a financially precarious time (Foote, 2008; Kopp, 2001a). But they did not amount to a lethal blow. Unlike the teachers’ unions, education professors had little leverage over the superintendents, school boards, and principals that ultimately controlled TFA’s entry into the system. Fortunately for TFA, ‘principals in the South Bronx were not reading *Phi Delta Kappan*’ (Kopp, *Interview*, 2017). Desperation for willing teachers in tough schools ensured that TFA survived excoriation from the professoriate. In the mid to long term, Darling-Hammond’s intervention may even have strengthened the organisation. The article was a catalyst for TFA to invest in more robust external performance evaluations of their recruits vis-à-vis conventionally prepared teachers:

[Darling-Hammond’s piece] certainly distracted people; it certainly took a lot of energy from people to figure out how do we respond? But in the long run I think the research response was healthy and helpful...I think her critique led to an investment of a significant amount of money...They did the RAND study and they’ve subsequently done a lot more. They’ve really ramped up their investment in data and research ...and they got way more disciplined. (Smith, *Interview*, 2017).

In addition to a lack of concrete political influence or veto power, teacher educators also suffered from a deficit of public credibility as disinterested sources of expertise. To many of TFA’s key corporate and philanthropic backers, criticisms of Teach for America from the education professoriate sounded like special pleading from just another vested interest. As education historian David Labaree documents in his book-length study, *The Trouble*

with *Ed Schools*, these ‘hapless and baleful’ institutions have long endured a poor public reputation. The ‘incompetence and misguided ideas’ of education schools ‘are seen as both producing poorly prepared teachers and wrong-headed curricula (2004, p. 3).²⁹ Myriad official reports throughout the ‘80s and early ‘90s had lamented the calibre of education students and the impracticality and facileness of much teacher training (Carnegie Corporation of New York, 1986; Lyons, 1979; National Commission on Excellence in Education, 1983; National Governors’ Association, 1986; The Holmes Group, 1986). In such an ideational climate, it is unsurprising that school districts and many of TFA’s early corporate and philanthropic backers were unmoved by the condemnation of educationalists. As Kopp recalls ‘I read [Darling-Hammon’s article] and I thought “this is devastating”...but our sources of funding felt that they understood the politics behind [Darling-Hammond’s attack]. And so it didn’t really seem to affect the funding. It’s not like we lost any funding’ (*Interview*, 2017). Furthermore, widespread disdain for education schools probably helped TFA to rebuff legitimate concerns about the inadequacies of their own teacher preparation practices. An early profile of the program drily observed that ‘what Teach for America had accomplished in its first summer of teacher training was to condense into eight weeks the same shortcomings that traditional education schools stretched out over four years’ (M. Shapiro, 1993, p. 189).

In sum, the antipathy of the education schools while intense, was ultimately impotent. These institutions exercised no veto power over the introduction of TFA corps into

²⁹ Labaree is far from alone in assailing the failures of American education faculties, though as a long-term inhabitant of education schools his account is less polemical than others. The early chapters of Labaree’s monograph explore a ‘vigorous and robust literature’ that has ‘fortified an already robust consensus on the negative influence of education schools.’ Key titles include Keorner’s (1963) *The Miseducation of America’s Teachers*; *Ed School Follies* (R. Kramer, 2001); Thomas Sowell’s (1992) *Inside American Education: The Decline, the Deception, the Dogmas*, which features a chapter on education schools entitled ‘Impaired Faculties,’ and E. D. Hirsch’s (1996) *The Schools We Need and Why We Don’t Have Them*, which includes a chapter on the progressive ideology of education schools called ‘Critique of a Thoughtworld’ (D. F. Labaree, 2004, p. 3).

schools and very little influence over the individuals who did wield this power. Similarly, a widespread scepticism of education schools meant that when Darling-Hammond *et al* inveighed against TFA, few in the business or policy community accorded great weight to their position. Indeed, in the long run, TFA may even have profited from their condemnation. Many corporate backers and ‘hard-headed’ policy types felt that the ire of the education schools was probably the price of making a difference (Schneider, *Interview*, 2017).

The Rudiments of a Reform Movement

While TFA’s potential to become a critical incubator of reformers was not widely perceived in its first decade or so, the rudiments of a reform movement were ‘baked in’ to the design of the program from the very start. Perhaps unwittingly to begin with (but with very clear intent from around 2000 onwards), TFA developed a program that primed its participants to become system disrupters. The following sections detail the selection, treatment, and network effects that helped to create a potent force for subversive change.

Recruitment and Selection: Capturing the ‘Best and Brightest’

TFA was distinctive among alternative certification schemes because it sought to recruit individuals who would not have ordinarily entertained a career in teaching, and whose backgrounds differed significantly from most career teachers (Teach for America, 1990). Because the organisation actively recruited from among the nation’s most selective colleges and universities, TFA participants were much more likely to come from socially and economically advantaged backgrounds – a fact that would become increasingly important as the organisation matured and participants transitioned into roles beyond the classroom. This approach to teacher recruitment marked a radical departure from

business as usual. For decades, the majority of the American teaching profession has been drawn from the bottom two thirds of college classes from lower-ranking universities (Auguste et al., 2010; Levine, 2006). Before TFA (and the various alternative certification schemes that TFA has directly inspired), few Ivy-educated high achievers found their way into American classrooms – much less classrooms in struggling urban and rural schools. Teach for America thus constituted a highly unusual pipeline of human capital. Moreover, TFA's recruits were chosen not merely to make up the numbers in struggling schools, but for their avowed commitment to fight 'educational inequality' (Kopp, 1989, p. 109). Consequently, TFA people tended to be 'differently ambitious' when compared with conventionally trained teachers, and impatient to make their mark beyond the classroom (Oscar, *Interview*, 2017).

TFA was attractive to ambitious college graduates because it presented an opportunity to 'do good and do well at the same time' (Labaree, 2010, p. 48). TFA's recruiting model riffed on the fact that teaching in a high-poverty school was a difficult, lowly paid, and ordinarily low-prestige job and sought to make a virtue out of these facts: 'By billing the opportunity to [join TFA]...as something the best and brightest will sacrifice for – something they do merely to be of service to others – the agency will create the same kind of mystique that the Peace Corps is able to create' mused Kopp (1989, p. 47). TFA's early recruiting materials sold the experience as gritty, rewarding, fast-paced, and vital to the nation's future, hoping to match 'the hype that currently lures so many who have undefined career plans into investment banking' (Kopp, 1989, p. 47).

Journalists at major national newspapers, intrigued by the notion of elite college graduates pledging to teach in some of the nation's poorest schools, devoted considerable coverage

to the scheme – much of it rhapsodic. A systematic survey of coverage of Teach for America between 1989 and 1999 in the *Washington Post*, *New York Times*, and *Wall Street Journal* retrieved 58 articles. Thirty-three were mostly or entirely positive about the program, 21 were evenly balanced or neutral, and only four were clearly negative.³⁰ National media coverage raised awareness of the organisation, boosted recruitment, and helped to develop a widespread public perception that TFA was an uncomplicatedly ‘good thing.’ In the early years, recalls Whitney Tilson, ‘TFA was sort of like motherhood and apple pie...Who’s opposed to bright energetic young people going in and trying to provide poor kids with a better education?’ (*Interview*, 2017). Against this narrative, critics who denounced the program as counterproductive or dilettantish looked churlish and self-interested. ‘It seemed politically incorrect to complain about these smart, idealistic young people’ (Ravitch, *Interview*, 2017).

While joining TFA might have meant some short-term sacrifice, in the long run participants stood to gain a valuable badge of excellence and virtue, because the TFA model carried professional prestige that other routes into teaching could never hope to match. By accepting only the ‘best and brightest’ TFA made teaching a hot ticket and the cachet was self-perpetuating. The more exclusive TFA was perceived to be among elite college graduates, the more enticing it became on Ivy League campuses in the 1990s. The drive to secure the ‘best and brightest’ also received a boost from a sluggish economy.

³⁰ A search for the term “Teach for America” was performed using FACTIVA, an online database of print media for the dates 1 January 1989 to 31 December 1999. The *Washington Post*, *New York Times*, and *Wall Street Journal* were surveyed because these titles are among America’s highest circulation newspapers and have a specifically national remit. Articles were classified as entirely or mostly positive if the piece concluded with an endorsement of TFA’s continued existence and/or expansion. Balanced articles were those that took no definitive position on the merits of TFA but canvassed praise and criticism of the program broadly equally. Factual reports about the operations of the program – for instance, expansions to new sites, major donations – without commentary on the merits of TFA were classified as neutral. Finally, mostly or entirely negative pieces were those that concluded that TFA was a counterproductive endeavour and ought to be discontinued.

TFA's early years of operation overlapped with a major economic slump (the National Bureau of Economic Research designated the period from July 1990 to February 1991 a recession), creating a tough job market for graduating seniors in the years that followed. From January 1990, the unemployment rate for recent college graduates rose from 3.5% to a peak of 4.9% in November 1992. It did not revert to 3.5% or lower until May 1997 (Federal Reserve Bank of New York, 2019). Several stories in the national press during this period detailed the unanticipated difficulties that graduates from elite colleges were having in finding desirable employment, and the concomitant appeal of service programs like Teach for America. As the New York Times reported in April 1991:

America's spring crop of college graduates...face the bleakest job market in a decade or more...One option in the dismal job market, many students and job counsellors say, is work in the public-interest sector. More students than ever are asking about jobs in the Peace Corps and Teach for America, a program to supply teachers for schools in disadvantaged areas of the country. (McFadden, 1991) (see also Hwang, 1991; Rierden, 1991).

While it is very unlikely that TFA's early fortunes were defined by the prevailing economic conditions, there is little reason to doubt that the tight job market aided TFA's recruiting efforts, and consequently enhanced the calibre of early cohorts and the overall viability of the program. Between 1990 and 1994 TFA's attractive fusion of prestige and service attracted 15,300 applications for 2762 positions (Mathews, 1994).

The Treatment: Life in the Corps

Wendy Kopp knew that the altruistic impulses of the most ambitious graduates were not inexhaustible. Consequently, TFA did not seek career teachers, but instead asked for two years of service. 'That the best and brightest will be willing to do' (Kopp, 1989, p. 45). Teacher educators criticised the short-lived commitment for propagating dilettantism and cultural tourism (Popkewitz, 1998). But the two-year limit was an important innovation – a feature rather than a bug – for two reasons. First, it made a period of *noblesse oblige*

service much more attractive to the would-be ‘masters of the universe’ that TFA hoped to recruit. As Timothy Knowles observes, ‘people were opting not to go to law school or medical school...and instead pursue teaching.’ If Wendy Kopp had ‘tried to pitch Teach for America for the rest of your life it wouldn’t have worked’ (quoted in Schneider, 2011, p. 93). Second, because TFA teachers had made a delimited commitment to teaching they had a limited stake in the status quo of the education system. Few envisaged a life-long career in the classroom and so few were materially invested in the long-term benefits and protections of the profession (Finger & Lastra Anadon, 2018; M. Kramer, *Interview*, 2017; Mandel, *Interview*, 2017). Moreover, because TFA placed individuals only in disadvantaged schools, participants were oftentimes confronted with some of the most dysfunctional aspects of the American education system (L. Finger & Lastra Anadon, 2018). Consequently, TFA corps members and alumni tended to be more interested in shaking up the system than preserving it. And though most TFA participants would not stay in their assigned schools beyond the two years, for many, their experience was enough to forge a lifelong interest in education policy (Fryer & Dobbie, 2015), cultivate greater empathy and concern for the disadvantaged (Mo & Conn, 2018), inculcate a deep loyalty to the TFA organisation and mission (McAdam & Brandt, 2009a), and nurture ambitions to seek political office or participate in political campaigns (Mo et al., 2019a).

Because TFA enabled individuals to enter the classroom via alternative certification instead of completing a conventional on-campus education degree, its participants were not initiated into the shibboleths of the profession as most American teachers are. As Matt Kramer, the former co-CEO of TFA explains, this aspect of the program has been particularly instrumental in cultivating reformers:

Teach for America brought in lots of capable, change agent-y type people...who didn’t know yet whether they wanted their entire life to be dependent on the

education system, and therefore preserving the system wasn't among their top priorities when they got in. The problem is – for the traditional system – once you've already taken the time to get an education degree, blowing up the system feels very risky... Teach for America was basically bringing people in who haven't made that investment yet, who are not locked in. I think that turned out to be really important for our ability to make change. (*Interview*, 2017)

In sum, TFA primed participants to disrupt the system from within, first as classroom-based agents implementing changes in practice, and subsequently as hard-charging principals, superintendents, education commissioners, school board members and other elected officials, enacting policy change at a systemic level.

The TFA Network

Whether one remained in the classroom at the end of the two-year commitment, or left to pursue another career, access to an increasingly influential and ever expanding alumni network was a key component of the TFA experience from the very beginning (Teach for America, 1997). For many, the TFA experience was transformative, forging close ties with fellow participants and a lifelong identification with the organisation (Foote, 2008; Johnston, 2003; Mathews, 2009; McAdam & Brandt, 2009b; Sentilles, 2006). In a 2011 interview with Wendy Kopp, Malcolm Gladwell likened the esprit de corps among TFA veterans to that of the US Marines:

There's always that moment in that kind of movie where one tough guy meets another tough guy and they're staring each other down and they're about to get in a fight and the guy goes 'wait were you in 'nam?...Were you in the Marine corps?'...and then they both go 'Semper Fi!'...[I imagine] there's an analogous moment when TFA alums get together and they say 'where'd you serve?' and the other guy goes 'South Bronx' and then they show each other their TFA tattoos. I joke, but TFA's a real movement! (2011)

Drawn from an elite cohort and galvanized by their experiences in the corps, TFA alumni 'belong to a club whose members are going on to great things' (Labaree, 2010, p. 50). Because of their backgrounds and attributes, TFA alumni were more likely to interact

with and influence individuals that exert considerable power over the shape of economic and social systems. Education historian Jack Schneider describes this phenomenon thus:

TFA is recruiting people with Ivy League credentials who were deferring banking jobs, for instance. So now they have all these people who have the exact same kinds of credentials as people at Morgan Stanley have, but they're working in the education space and...there's a huge sociological literature on the fact that it's easier for someone at Morgan Stanley to relate to the guy who played squash at Yale who then is working in education than the person who has an undergraduate degree in education from a second rate state school who is a lesbian of colour (*Interview*, 2017).

The TFA network thus serves as a 'powerful form of social capital,' and from the very earliest years, alumni have used it to disseminate information about job opportunities, discuss ideas for school reform, dispense mentoring, and offer support and inspiration to one another (Labaree, 2010, p. 50).

Over time, as the alumni network expanded and members advanced in their careers, the social capital generated compounded. Moreover, in its second decade, TFA introduced a number of measures aimed at deepening alumni ties and impact (more on this in Chapter 5). As the alumni network grew and matured, it was increasingly recognised as a vital resource not just for TFA but for the wider education reform movement too, in much the same way as the Federalist Society has indispensably served the conservative legal movement (Teles, 2008). Reflecting on the role of TFA in developing the contemporary reform movement, veteran Democratic party staffer and reform advocate Charles Barone offered this assessment: 'TFA is not the only route [into the reform movement] but it's the best organised route. And the route that's created an identity for people, in terms of "this is what I am. I'm a TFA alumni and we believe in change and believe in entrepreneurship and innovation.'" Without TFA we'd have far fewer of those people out there and they'd be less connected' (Barone, *Interview*, 2017). In sum, by selecting highly motivated elites, exposing them to the most abject shortcomings of the

system and fostering strong ties among them, Wendy Kopp created a potent force for change that would, in subsequent years, make its presence felt in consequential ways.

Conclusion

The foundation and early development of TFA is largely the story of a gifted social entrepreneur working under propitious conditions. TFA leveraged corporate concern about educational malaise to finance a nimble non-government entity which exploited the diversity and decentralisation of the US education system, targeting districts with shortages and flexible teacher licensure regulations. Kopp's simple and compelling narrative of placing the 'best and brightest' into the poorest schools garnered widespread media coverage, and fostered a perception of TFA as an 'innocent do-gooding' organisation, blunting early criticism. By promising important, worthy, and challenging work, under the auspices of a highly selective, and therefore prestigious, two-year program, TFA managed to induce graduates of elite colleges onto the frontlines of the K-12 system. Once there, many found the experience life-changing and continued to devote their energies to educational reform, well beyond their TFA period of service.

Critically, though TFA would develop into a highly contentious presence in American education in years to come, conflict with incumbent interests was minimal in the early years. The initial iteration of TFA – an earnest response to teacher shortages – was conciliatory towards the teachers' unions and the unions broadly reciprocated. The severity of shortages and the fact that alternative certification pathways had already been legislated in many states facilitated an early accord between these future adversaries. While several TFA participants of the early 1990s would eventually go on to profoundly disrupt American K-12 education, there was little indication of this long-run potential at

the time. Consequently, the unions largely left TFA alone. TFA's early adversaries – the education professors and teachers colleges – ultimately lacked the capacity to stymie the program because they had little influence over school staffing decisions.

The major impediment to TFA's progress in the first decade was financial not political. By 1993, most of TFA's seed grants had expired and it was still some years before the philanthropic community would recognise TFA's potential and invest heavily in its growth. Federal support under the auspices of the Americorps program, a rationalisation of TFA's activities, and a more concerted focus on regional fundraising helped to stabilise TFA's finances, though there would not be the resources required to expand to new regions until the end of the decade. By that time, TFA had compiled an evidence base of the short-term impact its corps members were having in the classroom, and convinced many among the growing ranks of 'edu-philanthropists' TFA alumni had long-run potential as reform movement leaders. Having gained a foothold in the system by promising to address a chronic problem and taking advantage of existing pathways, the organisation managed to carve out a secure niche by the end of its first decade. TFA entered the new millennium with major plans to expand and re-orient itself in ways that would prove much more disruptive to the status quo.

5. Growing the Organisation and Its Impact: 2000-09

By the end of its first decade, Teach for America had endured financial precarity and staunch criticism from ‘establishment’ teacher educators to secure a foothold in school districts across 13 regions and 10 states. Having attained a sustainable position, the organization lifted its sights towards major expansion, and developed additional programming aimed at deepening the ‘systemic impact’ of its participants. The first half of this chapter explains how Teach for America grew dramatically in its second decade, swelling the ranks of corps members and alumni within the US education system. Using process tracing I show that TFA’s pattern of development is congruent with the model of institutional subversion outlined in Chapter 3. As expected of subversive organisations, TFA walked a cautious line vis-à-vis incumbent groups. Hence, while TFA became much more deliberate and focused in its efforts to foster agents of change in its second decade, it continued to avoid taking public positions on many of the more contentious policy questions of the day. This deliberate ‘boundary maintenance’ helps to explain TFA’s continued ability to infiltrate and remain embedded in the traditional education system, even as it was priming a cadre of agents aimed at disrupting it.

TFA’s second decade of growth was met with only mild consternation from teachers’ unions and other vested interests. There were several reasons for this. First, TFA was careful to avoid expansions to regions where a favourable reception from local stakeholders was not assured and thereby avoided messy public altercations with vested interests; second, TFA’s expansion unfolded incrementally across a disparate set of venues and the sum was difficult to adduce from the parts; and third, union leadership did not construe TFA as a driver of systemic change until major shifts had already taken place. I show that while teachers’ unions were increasingly beleaguered throughout the period of

TFA's most dramatic growth, waning union strength is not in itself a sufficient explanation for the organisation's capacity to rapidly expand to new regions. Well into the 2000s, local union chapters continued to perceive TFA as a response to teacher shortages and a 'national service' organisation, rather than a catalyst of broader changes in policy and structure. Hence, incumbent *perceptions* of TFA, rather than incumbent strength, was the pertinent variable conditioning the organisation's capacity to expand.

The second half of this chapter traces the 'layering' activities of TFA alumni, and shows how TFA-spawned innovations rapidly diffused throughout the education system during the 2000s and attracted favourable notice from top-level policymakers and philanthropists alike. It also details the impact of a growing number of TFA alumni who steadily accreted policy influence as they founded advocacy groups and rose through the ranks of education bureaucracies across the country. In accordance with the subversive model of change detailed in Chapter 3, I find that education system incumbents only registered the systemic impacts of TFA's alumni belatedly. By the time the disruptive effect of TFA's agents had been noted and anti-TFA forces were mobilised, the system had been thoroughly infiltrated and substantial changes were already afoot.

Using counterfactual reasoning and comparative cases throughout, this chapter also disentangles the role of competing explanations for the reform movement's successes in recent times. I show that whereas earlier philanthropic efforts to engender change in the American education system largely foundered for want of cooperative and capable *agents* within traditional school districts, TFA was attractive to philanthropic backers precisely because it promised a solution to the principal-agent problems that had plagued earlier reform efforts. Similarly, TFA agents were indispensable in advancing and implementing

key aspects of the top-down ‘neoliberal’ reform agenda of the late 90s and 2000s. TFA-spawned innovations in charter schooling and alternative methods of teacher training, and provided policymakers with ‘proof points’ with which to bolster arguments for further liberalisation and diversification among school types and teacher education providers. These ventures developed loyal constituencies and grew rapidly with philanthropic and policymaker patronage. Without this activity today’s education system would be significantly less diverse and competitive.

Additionally, the infiltration of education bureaucracies at all levels by TFA alumni instigated and aided the implementation of choice and accountability reforms, while TFA-led advocacy groups critically augmented civil society support for the introduction and retention of these changes. For instance, a recent 50-state analysis shows that in the absence of TFA, state level laws permitting charter schooling and private school choice programs, repeals to tenure, and performance pay would be significantly less prevalent (Finger & Lastra Anadon, 2018). Finally, I show that while diminished vested interest power can loosen constraints on reform, organisations like TFA needed to fill the vacuum if concrete changes were to be realised. This fact is illustrated most starkly by the example of post-Katrina New Orleans, where the destruction of vested interests created an opening for change, but organisation and action by reformist agents was required to exploit it. Without TFA and its many spin-offs and allies, the reconstruction of the New Orleans education system would have taken a very different path, almost certainly one that more closely resembled the pre-Katrina system.

For the sake of readability, this chapter follows a broadly chronological structure, but it is by no means an exhaustive account of TFA’s development. What follows is a selective

narrative, which aims first to disaggregate the key conditions and factors that permitted TFA to become a major human capital pipeline for the reform movement during the 2000s; and second, to demonstrate *how* this pipeline of agents instigated substantive changes in the structure of the American education system in recent times. The chapter concludes with a brief summation of the extent to which the TFA case corresponds to the general model of subversion.

Growing the Organisation

At the turn of the twenty-first century TFA needed to grow in order to realise its ambition to tackle educational inequality on a national scale. Growth required more money, more recruits, and new regions of operation. Each of these three inputs was subject to endogenous and exogenous influences. For instance, TFA could manipulate how it presented itself to current and potential funders in order to solicit more financial support, but TFA did not ordain the broader changes in the dynamics of philanthropic giving that made it especially attractive to the ‘new philanthropists’. Likewise, TFA exercised greatest control over how and who it recruited, but even recruitment was not impervious to broader economic conditions. Finally, TFA could control how it approached and presented itself to new regions and could work sensitively and closely with local stakeholders to line up support, but the dynamics of expansion were not entirely within the organisation’s purview. Exogenous factors such as state and federal policies as well as union perceptions of TFA also affected the propensity of school districts to contract with TFA. The ensuing section details how TFA approached the challenge of expansion and the internal strategies and exogenous factors that permitted the organisation to grow and cultivate a cadre of reformers throughout the 2000s.

New Millennium, New Money, Newly Articulated Ambitions

TFA entered the new millennium with a sustainable balance sheet, strong recruitment numbers, and an increasingly robust public reputation. The organisation had assiduously courted favourable coverage in national newspapers and attracted the endorsement of prominent and powerful figures³¹, including outgoing President Bill Clinton, and incoming President George W. Bush (Kopp, 2001a). But TFA remained a small operation, by no means national in scope, and had not entered a new region since 1994. A decade in, TFA certainly fell well short of Kopp's then stated desire to 'build a *movement*,' not just 'a little non-profit organisation or a model teacher-training program' (Kopp, 2001a, p. 23). As the milestone of 10 years in operation approached, Kopp and other senior staff began to contemplate the future of the organisation. Jerry Hauser, an early TFA alumnus who re-joined the organisation as its Chief Operating Officer in 1998 from McKinsey & Co., recalls 'one moment in particular at the tenth anniversary celebration where we were kind of watching this huge event and realised "wow, we've made it." Our fundamental survival was no longer in question and now it's "ok, what's next? What more can we do?" and that's what helped spark the thinking about growth' (Hauser, *Interview*, 2017). Fortuitously for TFA, the organisation's readiness to expand coincided neatly with a significant change in the dynamics of education philanthropy – 'the timing was perfect' (Kopp, *Interview*, 2017).

³¹ From 1997 onwards, TFA attracted major celebrities, such as Oprah Winfrey and Henry Kissinger, along with CEOs of prominent corporations, to participate as guest teachers in the annual 'Teach for America Week,' a publicity stunt which garnered considerable soft focus coverage and donations for the organization (Foote, 2008; Kopp, 2001a). President Clinton lauded Wendy Kopp's efforts at a White House dinner in the spring of 2000 (Kopp, 2001a, p. 107). George W. Bush commended TFA while governor of Texas and held an event with TFA in Houston during the 2000 campaign. Laura Bush, named TFA one of the five organisations she would support as First Lady, and appeared at TFA events across the country during the 2001 Teach for America week (Kopp, 2001a, p. 189).

The turn of the twenty-first century saw a dramatic uptick in philanthropic giving to entities working within school education (Reckhow, 2013; Tompkins-Stange, 2016). While philanthropic interest in education was nothing novel, these ‘new education philanthropists’ were distinguished by ‘a heightened interest in structural change by giving to non-traditional providers rather than school systems [and] support [for] a coherent and coordinated reform agenda (F. M. Hess & Henig, 2015, p. 1). As Sarah Reckhow’s (2013) study, *Follow the Money*, carefully documents, in the year 2000, Progressive- and New Deal-era foundations such as Ford, Kellogg and Carnegie still made up the bulk of total grant-making in education and a large share of these grant dollars went directly to public schools. By 2005, however, a new group of foundations endowed by living patrons, such as Gates, Broad, Walton, and Robertson, had swelled the total grant dollars directed to educational causes. Moreover, these younger foundations focussed their money in a new and different direction. Rather than channelling funds to traditional school districts to disburse on their own terms, Gates *et al* supported new organisations that competed with traditional school districts and structures, such as Teach for America, and various charter school management organisations.

This sea-change in philanthropic giving was heavily influenced by the salutary example of the Annenberg Challenge. In 1993, former publishing magnate and US Ambassador to the United Kingdom, Walter Annenberg announced a \$500 million, five-year effort to reform K-12 schooling – the largest single gift ever made to American public education. The Annenberg Challenge funded eighteen locally designed projects in 35 states, including major grants to some of the biggest urban school districts in the nation (i.e. Chicago, New York, Los Angeles, and Philadelphia). While the Challenge had the bold aim of ‘unit[ing] the resources and ideas of those committed to increasing the effectiveness

of public schooling’ it did little to change structures, practices, or outcomes in grantee districts (Annenberg Foundation, 2019)³². While there were many contextually specific reasons for the disappointing results, independent evaluations concluded that the main reason that the Annenberg Challenge failed to live up to its promise was because projects were ultimately beholden to agents vested in existing structures and practices:

This was a non-confrontational approach to reform. The Annenberg Challenge was not set up to challenge the status quo; rather it relied upon much the same set of relationships and processes that had yielded the status quo in large public school systems...The Annenberg Challenge asked local non-profit groups, businesses, and other reform agencies to use their share of the largesse to negotiate change with the existing power structure of public education – the teachers’ unions, boards of education, and politicians – which of course had far more money at its disposal than the Annenberg Challenge was putting on the table. (Innest et al., 2000)

In short, by giving comparatively small financial inducements to districts to change behaviours and structures, the Annenberg Challenge amounted to ‘trying to reshape the ocean with buckets of water’. School districts did not want for resources so acutely that a ‘bucket’ of philanthropic money into the ‘ocean’ of K-12 spending would change the ‘ebb and flow of incentives that hinder progress’ (Greene, 2005, p. 33). If philanthropy was going promote real reform, it needed to leverage private dollars to *redirect how future public expenditures were used*. For instance, by supporting research and advocacy efforts that would inform education policy debates; by creating new types of public schools or administrative structures through which public dollars would flow; or by developing new training and credentialing entities that would affect who can become an educator, and the sorts of political activities that educators would engage in (Greene, 2005).

³² For instance, the final report on the Chicago Annenberg Challenge conceded that ‘rates of gain in student achievement among Annenberg schools did not improve markedly’ and ‘there were no statistically significant differences between Annenberg schools and non-Annenberg schools in rates of achievement gain.’ Moreover, classroom behavior and other non-cognitive measures ‘were weaker in 2001 than before the Challenge’ (Smylie et al., 2003, p. 2)

The spectre of the Annenberg disappointment loomed over education philanthropy in the ensuing decades (Gray, Interview, 2018; Reckhow, 2013; Tompkins-Stange, 2016). Its failure, ‘or at least the perception of such,’ was ‘the ugly elephant in the room in any conversation with potential donors...To earn their support, you first had to convince them that, this time, things would be different’ (McElroy, 2014, pp. 1–2). Reflecting on the lessons learned from Annenberg and other philanthropic misadventures of the 90s, prominent edu-philanthropist, Eli Broad said, ‘we [came] to believe that our money could work best where we found real change agents to make it work.’ The old model of direct grant-making to districts for specific projects was deemed ineffective ‘because the teachers’ union were running the show’ (Broad quoted in Brill, 2011, p. 93). Instead, the new philanthropy of the twenty-first century adopted the methods of ‘venture capitalism,’ giving big infusions of growth funding to entities that promised to bring about enduring changes in policies and structures, rather than project-specific grants to traditional entities ‘with a whole bunch of reporting and strings attached’ (Hauser, *Interview*, 2017; Huffman, *Interview*, 2017). Teach for America excited this ‘new breed’ of edu-philanthropists because it promised different *agents* embedded within the system that had the *discretionary power* and the *inclination* to affect changes directly (Reckhow & Snyder, 2014; Snyder, 2015). ‘Interest from big donors...in new ways of doing things and a feeling of urgency in changing the status quo...the new wave of venture philanthropy...that was huge for [TFA]’ recalls Hauser (*Interview*, 2017).

Kopp was quick to recognise the growing interest in ‘systemic initiatives’ amongst the philanthropic community at the turn of the millennium and was acutely aware that organisational expansion would require bigger and longer lasting grants than those that had sustained TFA in its early years (Kopp, 2001a, p. 78). Moreover, by the end of its

first decade, TFA could invoke a record of achievement to bolster the notion that ‘corps members...were forming a leadership force for the future – a leadership force that would have the insight and commitment to push through the systemic changes’ sought by the new foundations (Kopp, 2001a, p. 108). As Hauser recalls, ‘we were a mature organisation by then. We’d been around. People had seen that we weren’t going to tank, and we’d started to see alumni doing more and more interesting things’ (*Interview*, 2017). With large sums of philanthropic money in the offing, and a record of broader alumni impact already beginning to manifest itself, TFA increasingly identified to donors, and subsequently to the wider world, as a nursery of change agents.

Kopp has always maintained that she had envisaged TFA as a ‘movement’ for ‘systemic change’ from the very beginning, but that is not reflected in foundational statements of TFA’s objectives, as Chapter 4 documents. As Schneider and others point out, Kopp’s original plan ‘mentioned nothing about leaders’ (2011, p. 99). Jerry Hauser concurs, noting that ‘[TFA] was framed initially as more community service’ (*Interview*, 2017). Certainly, that is how teachers unions and other incumbent groups construed the organisation in the early years. Indeed, even those who opposed TFA from the very outset denounced it in those terms. Linda Darling-Hammond disparaged TFA, not because she anticipated its broader, long-run effects on the system, but because it treated teaching as ‘missionary’ work and thereby promoted the ‘de-professionalisation’ of the vocation (1994, pp. 21–23). As Chapter 4 explains, this ambiguity of purpose helped TFA to infiltrate the education system in the early 90s without antagonising powerful incumbents. Yet, irrespective of the original vision Kopp may or may not have had for TFA at its foundation, it is quite clear that during the 2000s the organisation underwent a significant shift in the *outward* presentation of its mission and a corresponding internal re-

organisation. In short, in exchange for their money, philanthropists secured agents primed to affect change; while TFA, as a dedicated nursery of ‘talent’ for the reform movement, was lavished with ever more philanthropic largesse.

A proffer of \$8.3 million from the Pisces Foundation (endowed by Don and Doris Fisher, founders of The Gap) in May 2000 kicked off TFA’s gradual repositioning. Like its bigger foundation counterparts, Pisces appreciated that TFA was inducing bright young people to teach, but it was especially interested in the role that TFA alumni could play in catalysing broader policy change within the system (Kopp, 2001a, p. 183). The Pisces gift prompted TFA to come up with a five-year expansion plan which dramatically recast the organisation’s stated goals (Mead et al., 2015). Henceforth, TFA focussed resolutely on being more than just a source of teachers for needy schools. ‘Fostering the leadership and ongoing contribution of alumni as a force for long-term change’ and ‘mak[ing] the movement as large as possible’ became major priorities (Kopp, 2001a, pp. 182–183). Throughout the 2000s, other foundations (most notably the ‘big three’ of Gates, Walton, and Broad) converged on TFA to finance these objectives (Reckhow & Snyder, 2014). In other words, what had started out as a possibly unanticipated corollary of the original Teach for America program, soon became its main focus. Throughout the 2000s, ‘TFA shaped this narrative for folks who would otherwise be loath to pour their billions into public sector bureaucracies where unions have a heavy hand in governing; now, they are happy to invest in the education sphere knowing that this business-minded third party is working to disrupt the system,’ observes education historian Jack Schneider (*Interview*, 2017).

By the time TFA began a \$60 million expansion effort in 2005, it was publicly articulating its purpose in a very different fashion from its original pitch. A TFA press release from the time cited patron Donald Fisher's conviction that 'Teach for America's growth and success is critical to the growth of other education reform efforts including the charter school...effort' because it would 'create reform leaders for the coming decades' (Teach for America, 2005). By 2008, TFA Vice President, Julie Mikuta, would argue that 'the program was never intended to solve the teacher shortage problem or even to fix public education simply by preparing bright college students to teach for two years.' 'Instead, TFA intends to transform public education by exposing these talented people to the challenges of public education and engaging them in figuring out solutions.' Thus, the true import of TFA would only emerge as 'alumni take on more visible and influential roles' (Mikuta & Wise, 2008, p. 60).

A number of authors have pointed out that reframing TFA in such terms also helped to combat growing criticism about the short-term nature of the program and the high incidence of TFA teachers who did not remain in the classroom beyond their two-year commitment. As Foote notes, 'by emphasising the longer-term goal of the mission, TFA was able to neutralise some of the well-founded concerns around the issue of teacher churning in underperforming schools. It was hard to argue with the idea that true educational reform would require people in leadership positions beyond the classroom' (2008, p. 195). The repositioning of TFA was also a straightforward concession to reality. TFA was never going to comprise anything other than a vanishingly small proportion of the total teacher workforce in the United States. Hence, if the organisation wanted to affect change at a national level, it needed to focus on cultivating its participants as

‘leaders’ for reform and placing its alumni strategically within the education policymaking apparatus.

With hindsight it is easy to trace TFA’s pivot towards ‘systemic impact’ throughout the 2000s. We know what to look for and which statements to retrospectively invest with particular significance. But the shift in TFA’s declared mission was slow to register with contemporary observers, even those who had followed the program very closely since its inception. Gary Rubenstein, a 1991 TFA corps member-cum-staunch-TFA-critic, reflected in 2011 that ‘TFA is now completely different than it was when I joined’ but ‘the change happened so gradually I hardly noticed it’ (2011). Education historian Diane Ravitch concurs, though in more acerbic terms. ‘TFA originally branded itself as akin to the Peace Corps – a warm cosy, well-known model to send young people to do hard work in difficult situations, offering their service where it was badly needed.’ It took a long time to ‘puncture the balloon of innocent idealism that Kopp fostered’ and for unions and other traditional public education advocates to realise that ‘TFA was undermining’ traditional structures, practices, and power-holders within the system (*Interview*, 2017).

New programming to foster alumni impact

While the Teach for America program had (perhaps unconsciously) been producing change-agents from its earliest years of operation, it became much more deliberate about the cultivation of alumni leadership throughout its second decade. Various initiatives were grafted onto the core two-year program with the intention of ‘foster[ing] and accelerat[ing] the leadership of alumni...in policy advocacy and elected office’ (Kopp & Farr, 2012, p. 26). In 2003, the Office of Civic and Career Opportunities was launched, with the aim of connecting alumni with jobs, advocacy resources, and privileged entry to

certain prestigious graduate schools (Mead et al., 2015)³³. The Capitol Hill Fellows Program was subsequently developed in the late 2000s, in order to place TFA alumni in the offices of US Senators, Representatives, and the House and Senate Education and Workforce Committees. The Fellows do the regular work of a congressional staffer but their salaries are funded by the philanthropist and charter school proponent Arthur Rock (Simon, 2013). This ‘highly unusual’ arrangement has been criticised as an unofficial and undeclared, but seemingly effective form of ‘lobbying’ on the part of TFA (Ravitch, *Interview*, 2017; Simon, 2013).

By far the most significant innovation to TFA’s programming was the development of Leadership for Educational Equity (LEE). Established in 2007, LEE supports TFA corps members and alumni wishing to run for elected office, secure a policy role, or start a policy advocacy group. As members of LEE, corps members and alumni gain access to a large network of donors and canvassers, as well as ‘fellowships, trainings, partnership programming, and multimedia resources’ (LEE cited in Jacobsen, White, & Reckhow, 2016, pp. 7–8). Described by some as ‘TFA’s political arm’ (Cersonsky, 2012; Rubinstein, 2017; Simon, 2013), LEE was established as a 501(c)4, separate from TFA because it is primarily focussed on policy advocacy and TFA’s 501(c)3 charitable status permits only ‘insubstantial’ lobbying efforts (Meyers, *Interview*, 2017). Yet despite the ‘firewall’ separating TFA and LEE, the two organisations work together very closely.

³³ Over 70 elite graduate programs currently have formal partnerships with Teach for America. These partnerships entitle TFA alumni to such privileges as application fee waivers, tuition fee discounts, guaranteed scholarships, guaranteed deferrals, and waived requirements for written recommendations (Teach for America, 2019a). More than 500 employers partner with Teach for America, including Google, Deloitte, McKinsey & Co., and Boston Consulting Group. Partnerships afford corps members and alumni access to internships, networking opportunities, advanced standing in recruitment rounds, and guaranteed deferrals (Teach for America, 2019f).

TFA regional directors push hard to ensure that all corps members are signed up with LEE before they become alumni, and zealously pursue other targets around corps member and alumni civic participation that LEE helps to facilitate. For instance, as one regional Executive Director related to Jacobsen *et al.*: ‘within the next three years we want at least two people to run for office and we set a goal of at least one person actually taking office’ and ‘we want to see within the next three years, 10 people working in and taking on leadership roles within non-profits within [the mid-sized city], specifically within policy non-profits’ (2016, p. 6). TFA regional directors describe their function as ‘a conduit’: ‘we try to connect our folks to as many opportunities as possible because we know that at the end of the day if I, as a corps member, get connected to an opportunity, I am going to be more likely to stay [in the region]’ (Jacobsen et al., 2016, p. 20). There is good evidence that, together, TFA and LEE are having the desired effect. Data collected and published by LEE shows that across the 2013-16 election cycles, LEE-backed candidates won elected office at three to five times the rate of candidates with similar backgrounds who were not supported by LEE (Leadership for Educational Equity, 2017). A recent study by Mo, Conn & Anderson-Nilsson (2019b) corroborates LEE’s data. Using a regression discontinuity approach to compare female TFA alumni with highly-ranked female applicants who did not enter the program, the authors find that participation in TFA significantly increased women’s political ambitions, with especially pronounced effects for women of colour. By 2018, TFA counted nearly 200 elected officials and 500 policy advocacy and organisational leaders among their alumni (Teach for America, 2019c).

LEE is adamant that it is apolitical and applies no policy ‘litmus tests’ to the alumni it supports (Meyers, *Interview*, 2017). Nonetheless, many of its featured candidates over the

years have unequivocally been advocates for key planks of the reform agenda. While much of the LEE website is password protected and accessible only to members, a survey of this content conducted in early 2012 shows that the organisation actively highlighted the candidacy of reform champions. For instance, of the five LEE members profiled on its website's 'Candidate Corner,' three explicitly touted as key policy priorities merit-based pay, expanded standardised testing, and 'parent triggers' to force district boards to take action on schools deemed to be failing (Cersonsky, 2012). All of these policies were (and are) strongly opposed by teachers unions and/or a majority of the teaching profession at large (Cheng et al., 2018b; Eidelson, 2012; Howell & Henderson, 2010). Similarly, the landing page of the LEE website in 2011 promoted job opportunities at several reform advocacy organisations including: StudentsFirst³⁴, Educators for Excellence³⁵ and Families Empowered³⁶ (Leadership for Educational Equity, 2011). This evidence coheres with a recent study of campaign messaging of TFA alumni candidates running for election to local school boards. Jacobsen and Linkow (2014) find that TFA alumni candidates are much more likely to emphasise the importance of closing achievement gaps and the responsibility of schools and teachers for doing so, and to endorse rigorous test-based evaluations of teachers than their non-TFA affiliated opponents.

³⁴ StudentsFirst was a lobbying organisation founded in 2010 by Michelle Rhee in support of education reform. In March 2016, StudentsFirst was merged with a similar organisation called 50-CAN. StudentsFirst agitated for the passage of state laws to expand charter schools, reform teacher tenure, and introduce teacher evaluations based on improvement in student test scores (Resmovits, 2016).

³⁵ Educators for Excellence is a network of state-based lobby groups, founded in 2010 by Teach for America alumni, that aims to 'ensure that teachers have a leading voice in the policies that impact their students and profession.' Among other things, E4E lobbies for teacher compensation structures that 'create incentives for serving in hard-to-staff positions and schools, and for significantly impacting student growth' (Educators for Excellence, 2019). Because of its advocacy for merit pay and its insistence that test-based measures of student attainment should comprise a significant proportion of teacher evaluations, E4E has been denounced by some as 'anti-union' (Rubinstein, 2018).

³⁶ Families Empowered is an advocacy organisation that promotes school choice and educates parents to choose more actively among 'neighborhood public schools, charter schools, magnet and vanguard schools, religious and private schools, or home schooling and online education' (Families Empowered, 2019).

More broadly, surveys of TFA corps member and alumni attitudes suggests that a majority of the program's participants subscribe to the general premises that underpin the reform movement and that their TFA experiences have been instrumental in forming these views (Mo & Conn, 2018). For instance, Jacobsen *et al* find that over the course of their service, TFA corps members become increasingly 'cynical' and 'discouraged' about local school district administrations and their capacities to improve the performance of the system (Jacobsen et al., 2016, p. 25)³⁷. Similarly, a 2005 study finds that corps members view 'low expectations as a significant cause of the achievement gap' and 'emphasise the potential of both teachers and principals to change academic outcomes for students – in spite of all the external challenges.' Moreover, as 'corps members spend more time in the classroom, the priority they place on funding gives way to other factors,' such as higher quality teachers and better school leadership (A. Smith, 2005, pp. 1–3). By contrast, Gallup polls indicate that since 2000, the American public has cited a 'lack of financial support' as the most pressing problem facing local schools (Richardson & Suida Jacques, 2018, p. 22). Similarly, increases in school funding and teacher salaries have been enduring top priorities of teachers unions and the profession at large (Cheng et al., 2018b; McGuinn, 2006). In all, TFA programming seems to prime many participants to believe in the broad precepts of education reform – beliefs that are apparently quite distinct from their non-TFA teacher counterparts³⁸. Moreover, TFA has very deliberately

³⁷ The share of corps members who disagreed with the statement 'my city's school district is supportive of educators with new ideas to improve education' increased substantially between the beginning of the two-year TFA placement and its conclusion (Jacobsen et al., 2016, p. 25)

³⁸ Ideally, this thesis would present more thorough data on the policy beliefs of TFA participants and how they compare with those of the teaching profession at large. Earnest attempts were made to compile data of this kind. In January 2018 I wrote to TFA to seek their cooperation in surveying TFA corps members and alumni in order to gauge opinion on contentious issues in education policy and school reform. In order to test the extent to which TFA corps and alumni hold discernably different opinions from non-TFA teachers, I proposed the use of questions from the annual *EducationNext* survey administered by the Politics of Education Policy and Governance program at the Harvard Kennedy School. Since 2007, *EducationNext*

put in place programming to help alumni gain the bureaucratic and political influence required to see these beliefs enacted.

More 'leaders' to grow the 'movement'

In the early 2000s, TFA revamped corps recruitment to better serve its recast mission. An ambitious target of doubling the number of participants to four thousand a year by 2005 necessitated a much more aggressive and purposeful recruitment method, while the goal of deepening alumni impact saw a shift in the type of individuals TFA sought. In its first decade, TFA had taken a fairly conventional approach to recruiting. At the outset, it had identified '100 of the nation's top colleges,' on the basis of 'a variety of measures including size, selectivity, and minority enrolment' (Teach for America, 1990), then sent recruiters to these campuses to disburse advertising materials and hold information sessions. The best candidates were selected from whomever happened to apply. But ten years in, total applicants were nowhere near what they needed to be to sustain dramatic growth. 'We felt like no matter what we did, we got 3000 applications' (Kopp, *Interview*, 2017). To resolve the recruitment dilemma TFA enlisted outside help. On the advice of McKinsey & Co., TFA started to recruit like McKinsey & Co.:

We started looking at what these companies were actually doing and when we realised what we were up against we understood we were going to have to do the same thing but with no money...you know, McKinsey will just take ten Harvard alums and give them a million dollars and say go get us the top ten Harvard grads to work at McKinsey. And they'll go...and wine and dine them...really get to know people...So we realised we're going to have to, somehow, deeply penetrate these campuses, figure out who we want and build

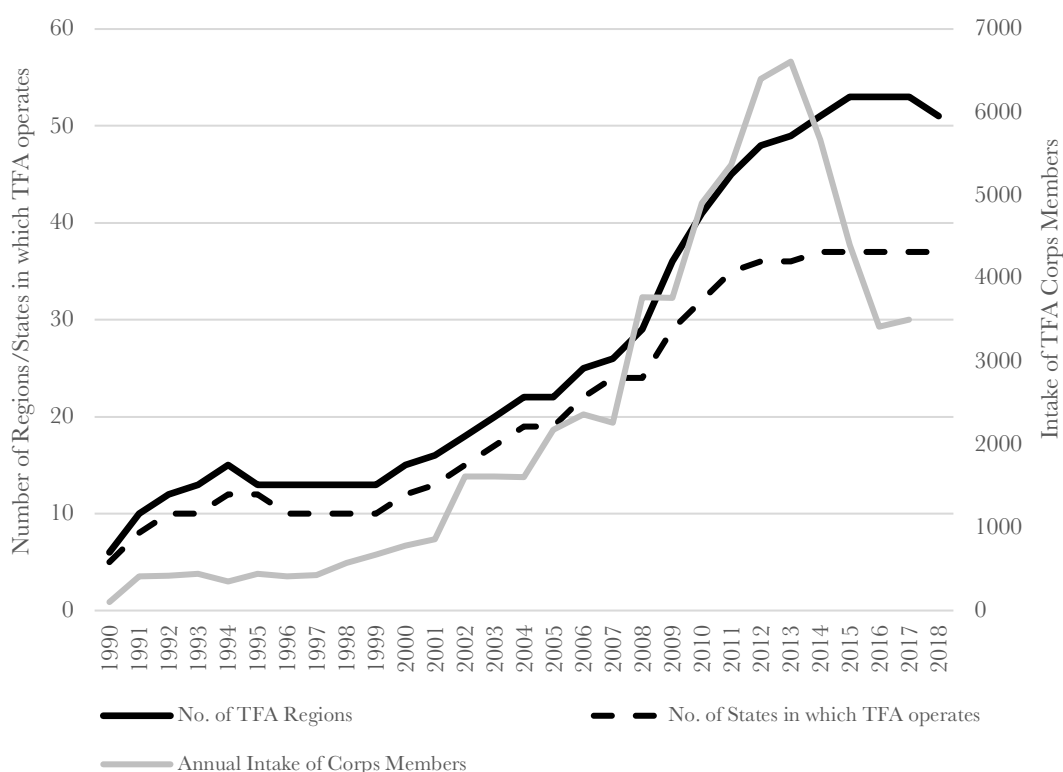
has polled a nationally representative sample of teachers (and a sub-sample of unionized public school teachers) on issues such as school funding, school choice, merit pay, teacher tenure, the Common Core curriculum, and standardized testing. By asking the same questions of TFA participants as asked of teachers-at-large by *EducationNext*, I could ascertain through a simple difference of means test, whether or not TFA participants have statistically significantly divergent viewpoints on education policy and school reform. After several discussions with TFA's Head of Research, I was advised that TFA would not be prepared to administer any of my questions as part of their annual alumni survey and was not prepared to do a standalone survey. I was told that as TFA already imposes a heavy survey burden on its participants the organization did not want to compromise response rates with additional questions. It should be noted that TFA has otherwise been very responsive to my approaches and has gone to some trouble to fulfil my requests for data about corps sizes and placement sites, and alumni demographics and destinations.

relationships with them...Once we started a relationship building strategy that helped us break through (Kopp, *Interview*, 2017).

Rather than waiting to see who would respond to TFA's call for applications, TFA's new recruitment strategy actively pursued the individuals it wanted. On the advice of professors, campus activists, school administrators, and recent alumni, TFA identified the individuals most likely to meet their exacting selection criteria and contacted them directly, initially via email, then later through phone calls, face-to-face meetings, and campus dinners (Foote, 2008). The new strategy was supported by a doubling of the number of recruiting staff and much more rigorous tracking and analysis of application data. In short, it worked. By 2005, 17,000 people applied to join TFA (Kopp & Farr, 2012, p. 2012). The new approach to recruiting would sustain dramatic growth in corps sizes until 2013 (see Figure 6 below).

The early '00s also saw a shift not just in *how* TFA recruited but also *who* it was targeting. In the early years, recruits had tended to be 'the stereotypical Peace Corps' types who could imagine a long stint in the classroom (Crutchfield & McLeod Grant, 2007, p. 162). TFA's early promotional materials implored idealistic youth to devote two years of their lives to 'schools which most need teachers' (Teach for America, 1989). Gary Rubenstein, who joined TFA's second cohort in 1991 and is still a classroom teacher, recalled that 'at that time we all felt we were filling teacher shortages around the country – if not for us, who else was going to do it?...We weren't joining because we thought American teachers were deficient in any way – there just weren't enough of them in certain places' (*Interview*, 2017b).

Figure 6: Growth of Teach for America, 1990-2018: Regions, States, Corps Intake



Source: Compiled by the author with data provided by Teach for America

Ten years in, market research commissioned by TFA showed that it ‘was perceived as a grass-rootsy, do-gooder organisation’ that was failing to reach a different group of ‘socially conscious’ ‘long-term changers’ who ‘thought the best way to remake the world was through law school’ or some other postgraduate or professional pathway. In response, TFA sought to reposition itself as ‘smart, serious, and purposeful – an important alternative to Goldman Sachs or grad school’ in order to appeal to individuals who wanted to ‘have impact’ beyond the classroom (Foote, 2008, p. 196). By 2001, the pitch to prospective recruits no longer mentioned teacher shortages. That year, the landing page of teachforamerica.org bore the following message: ‘You want to change things. Start here.’ Also featured was a distinctive testimonial from a current corps member: ‘I enjoy my life as the twenty-three year-old chief executive officer of the non-profit organisation known as Room 104B. I have a responsibility matched by few. The

potential for “growth” and “increasing share-holder value” and “opening new markets” in my industry cannot be quantified’ (Teach for America, 2001b). In short, TFA was transforming itself into ‘a twenty-first century hybrid – an organisation with the soul of a non-profit and the brains of a Fortune 500’ (Foote, 2008, p. 193).

Entry into new regions

Alongside funding and recruitment, securing new regional partnerships was the third piece of the expansion puzzle for TFA. Kopp’s ambition to forge a truly ‘national movement’ required TFA to extend its footprint well beyond the handful of regions it had entered in the ‘90s and to entrench itself in the nation’s biggest urban districts in particular. Between 2000 and 2009, TFA spread to 24 new regions, including major cities such as Chicago, Atlanta, Philadelphia, and Miami (see Table 10 below, detailing TFA expansion over time). TFA encountered only mild resistance from teachers’ unions during this period of prodigious growth, in part because the unions were pre-occupied with more immediate threats to their interests from state and federal reform efforts, but also because TFA’s long-term disruptive potential, while increasingly recognised by philanthropic supporters, was yet to manifest in a widely perceptible way. Quite simply, union leadership viewed TFA in narrow terms, as a potential threat to the jobs of conventionally-prepared career teachers, but not as a catalyst for broader changes they opposed. In short, TFA’s opponents did not grasp the extent of TFA’s ambitions for change and the organisation’s long run capacity to realise them. This miscalculation bred complacency.

The locations of TFA’s new regions were determined by a constellation of factors. Eric Scroggins, a senior TFA staffer responsible for overseeing much of the expansion in TFA’s

second decade explains that whereas TFA's growth in the first decade had been largely 'organic' – driven almost entirely by concentrations of teacher shortages – it became more strategic during the second decade. Demand from local districts continued to be a prerequisite for entering a new region, but there were other considerations too. 'As the local demand started to grow and we couldn't respond to everyone's request...we started to learn that we had leverage and that we could actually be more purposeful' (Scroggins, *Interview*, 2017). TFA began to charge districts a fee for placement in 2005 and this revenue sustained further expansion. A regionalised fundraising model was also adopted around this time. Instead of relying solely on a handful of big national donors to underwrite all operations, individual regions became responsible for cultivating local philanthropic and government support. 'Basically we finally found a funding strategy that connected our revenue to our product' recalls Kopp (*Interview*, 2017). 'We'd say if you can put the funding together we'll come...once we did that, that's what really generated the operating base for growth.'

Table 10: Growth of TFA regions over time

Year	New Regions	No. of new regions	Total Regions
1990	Los Angeles; Southern Louisiana; Greater New Orleans; New York City; Eastern North Carolina; Rural Georgia	6	6
1991	Mississippi Delta; Houston; Rio Grande Valley; Bay Area	4	10
1992	Baltimore; Washington D.C.	2	12
1993	Greater Newark	1	13
1994	Phoenix; Seattle	2	15
1995	<i>Seattle and Rural Georgia discontinued</i>	-2	13
2000	Chicago; Metro Atlanta	2	15
2001	New Mexico	1	16
2002	Detroit; St Louis	2	18
2003	Miami-Dade; Greater Philadelphia; <i>Detroit discontinued</i>	2	19
2004	Nevada; South Dakota	2	21
2006	Connecticut; Hawaii; Memphis	3	24
2007	Colorado	1	25

2008	Jacksonville; Indianapolis; Kansas City	3	28
2009	Delaware; Massachusetts; Greater Tulsa; Milwaukee; Minneapolis-St Paul; Greater Nashville; Dallas-Fort Worth	7	35
2010	Alabama; Detroit relaunched; Rhode Island; California Capital Valley; San Antonio	5	40
2011	Appalachia; South Carolina; Washington state relaunched; Oklahoma City	4	44
2012	Greater Cleveland; Southwest Ohio; Arkansas	3	47
2013	San Diego	1	48
2014	Buffalo; North Carolina Piedmont Triad	2	50
2015	Idaho; Orlando	2	52
2018	<i>Mississippi Delta and Arkansas regions merged</i>	-1	51

By the mid-00s, TFA had developed a sophisticated model for determining the regions it would move to next. The model considered the severity of education needs, applicant preferences for certain destinations, the amenability of state certification regulations, the presence of local funders and ‘champions,’ TFA’s desire to be truly national in scope, and the imperative to cultivate a wide and bipartisan network of political patrons (Huffman, *Interview* 2017; Mead et al., 2015). Scroggins explains:

We basically ranked every statistical area – including rural sites – and then we weighted those criteria. So when someone would reach out to us...we would prioritize the [requests] that [were] helping us build the national movement we were seeking to build...For example, if we were deciding between a third site in Texas or a new site in Indiana where we didn’t have a presence yet and therefore didn’t have any way of accessing a governor or a Senator, we would go there...We did not try to go to places that were not asking for TFA...there had to be local champions...To launch a site you had to have funding for three years, a contract with the district, you had to have some local board support. (*Interview*, 2017)

By requiring local ‘champions’ to demonstrate demand and to ensure a receptive environment, TFA effectively outsourced much of the politicking involved in expansions to other entities – most commonly local politicians, captains of industry, school boards, superintendents, and philanthropists. Moreover, TFA was able to avoid high profile clashes with unions and other local opponents because sites that appeared unreceptive were simply left alone. If significant organised resistance was anticipated in a given location, TFA expanded elsewhere, or delayed expansion until they were satisfied that

there was sufficient and sustained support for an incoming TFA corps. ‘We were not in the business of picking fights’ recalls Matt Kramer, a senior TFA executive from 2005 to 2015. ‘If we realised on the front end that it was going to be a total mess, we generally would take it very slow...we tried not to enter situations that seemed like unwinnable fights’ (*Interview*, 2017a). TFA’s sensitivity about antagonising local vested interests meant that much of its second-decade expansion unfolded with little consternation, and attracted minimal media coverage. ‘It didn’t attract a lot of attention until they’d already gotten quite large’ recalls seasoned education journalist, Alexander Russo (*Interview*, 2017).

For the most part, as in the early 90s, TFA was grudgingly accepted by local teachers unions, because it was regarded as a least worst solution to ongoing teacher quantity and quality concerns. ‘Longer term, yes, TFA has been a conduit for all of these reformers who undermine broader union goals,’ but until recently, ‘fighting TFA wasn’t a huge priority for unions’ observes Harvard professor of education, Martin West. TFA corps members ‘joined the union and paid union dues’ and for unions, ‘arguing against the district bringing in these really talented people who want to work here for a while – it’s hard to argue against that publicly’ (*Interview*, 2017). In the *No Child Left Behind* era of top-down accountability reforms, TFA was for most local union chapters a second or third order concern.

TFA’s move into Chicago in 2000 is illustrative of the generally low-key nature of TFA’s second-decade growth, even when expansion brought the organisation into teachers’ union strongholds. Given the strength and militancy of the Chicago Teachers’ Union (CTU) in more recent times, one might have expected that TFA’s move into the city would have met with staunch union-led opposition. For instance, in 2012 the then leader

of the CTU, Karen Lewis, opined that policies supported by TFA ‘kill and disenfranchise children from schools across the country,’ that ‘Chicago [had] been the victim of [TFA’s] experiments on our children,’ and that ‘the accolades heaped on a group of education missionaries [i.e. TFA] cannot go unchallenged’ (quoted in Ravitch, 2012). But TFA’s entry into Chicago was relatively smooth. With the backing of the then superintendent Paul Vallas, funding and political support from the Chicago Public Education Fund – an initiative of the city’s ‘top civic and corporate leaders’ – and the ‘serendipitous’ gathering of well-connected TFA alumni in the city, Teach for America ‘managed to resolve every problem [it] faced in expanding into Chicago’ (Kopp, 2001a, p. 154). Most importantly, TFA’s connections to the controversial reforms and ‘experiments’ that Karen Lewis would so deplore by 2012, were not readily apparent in the early 2000s. Indeed, Marion Hodges-Biglan, the first executive director of TFA’s Chicago operations, recalls that ‘we weren’t pitching the long-term impact [when we went into Chicago]...the message was we’re doing this because we believe that low-income kids deserve to have the same opportunities as kids in high-income schools’ (quoted in Schneider, 2011, p. 100). In short, while TFA’s pitch to donors and applicants was rapidly evolving from the early 2000s onwards, it was not until the very end of the decade that interests vested in the traditional structures of American public education began to perceive TFA as a ‘systemic threat’ to the status quo (Kramer, *Interview*, 2017a).

Site expansions in the early 2000 were not entirely trouble-free, but TFA was quick to de-escalate conflict with local unions when it arose. For instance, in 2003, TFA made a tactical withdrawal from Detroit, having opened the site only a year prior. Teach for America had become controversial with the Detroit teachers’ union not because its people were perceived as a fifth column, but for much more prosaic reasons. TFA had gone into

the region just as Detroit's economic woes were starting to become acute and the city was haemorrhaging residents (Resmovits, 2011). 'I think people were rightly saying, "wait a second. It looks like we're going to wind up having to close schools and compress our workforce and we have this new program coming in?"' recalls then TFA Vice President, Kevin Huffman (2017, *Interview*). 'So there was union opposition, but in a context where it really wasn't a good environment for us to be coming in the first place.'

Greater Boston was a similarly sensitive expansion, and one that TFA approached very cautiously and methodically. By the time TFA began exploring the site in early 2007, it 'was probably the last major urban centre that [it was] not operating in...it was somewhat conspicuous by its absence' (Biber, *Interview*, 2017). In part, this was due to the fact that there was no overall teacher shortage in Boston and the educational need was less pronounced than elsewhere. But another reason for TFA's caution was the fact that it anticipated some resistance from the robust local teachers' union and other advocates of traditional public education. 'There was certainly some scepticism which is more concentrated in a place like Boston than other places' (Biber, *Interview*, 2017). In light of this, TFA employed a seasoned staffer, Josh Biber, first to gauge the political feasibility of expansion, and subsequently to prepare the ground for TFA's entry well ahead of the first corps members taking up positions: 'I spent a year and half slowly building partnerships...this was the first place where we piloted hiring someone full time who already lived here and was part of the community...and that was because the variables here were different' noted Biber (*Interview*, 2017). Before TFA's leadership made a final decision on opening a Greater Boston site, Biber solicited guarantees of support from the state education secretary, and local superintendents, school boards, and principals. The head of the local union, Richard Stutman, was consulted at an early juncture and

countenanced the arrival of a TFA corps provided they were union members and were not displacing career teachers. Union antipathy did flare briefly, but, as in Detroit, concerns centred on potential job losses due to the incipient financial crisis, and not on TFA as a vector for systemic reform. Stutman told the Boston Globe in early 2009 ‘we are furious that the department would lay off teachers with excellent credentials and bring in people with no experience and little training.’ But, he emphasised, his opposition to TFA was ‘purely budget driven.’ ‘If times were good, we wouldn’t have a problem [with TFA]’ (Stutman quoted in Vaznis, 2009). Indeed the BTU’s complaints dissipated later in the year once it became apparent that layoffs would not occur. Jennifer Berkshire, an erstwhile union colleague of Stutman’s, corroborates the idea that unions were slow to identify TFA as a source of systemic disruption. ‘Part of my frustration working for the AFT in Massachusetts’ she recalls ‘was that no one really knew anything about this stuff. It’s only been in the last ten years that there’s been a consciousness among leaders and activists about how all these organizations overlap and what their goal is. I can’t think of anyone who I worked with who was really knowledgeable about Teach for America’ (Berkshire, *Interview*, 2017).

In sum, throughout its second decade, TFA learned from every expansion and used its accumulated knowledge to navigate the system deftly. As Schneider observes, ‘each battle was being fought locally, as a reinvention of the wheel for the unions, as opposed to each time TFA had learned lessons and operated with a little more knowledge and benefited from centralised resources and could increasingly say, “oh, we’re in New York, we’re in LA, we’re in Chicago – why would you say no?”’ (Interview, 2017). The disparate and incremental nature of TFA’s growth also belied the eventual scale of the organisation. TFA’s approach ‘has generally been to grow slowly and under the radar in each district’

observes Jamieson Brewer, a TFA alumnus-cum-academic critic of the organisation (*Interview*, 2017). But over time, and across many dozens of districts, this approach amounts to a significant alumni force. Of course, not all TFA alumni remain active in education, and of those who do, not all are committed to reformist goals, but a significant portion of them are. As Kevin Huffman relates:

With Teach for America's growth...it was hard for people to wrap their heads around – because even when TFA at its peak is bringing 5000 corps members a year...that's just a few thousand teachers being hired every year out of several million across the country. But I don't think people caught up to what that would do on the back side with alumni. As you suddenly hit 50,000 alumni and there's a path to 100,000 alumni...they realise this thing...it's actually pretty big...Twenty years too late, suddenly some opponents of Teach for America realise 'holy cow,' these Teach for America alumni are staying in education and they're assuming leadership positions and there are a lot of them.' (*Interview*, 2017)

A favourable policy climate

In addition to TFA's internal repositioning and careful navigation of the politics of site expansions, there were also exogenous factors that aided growth. The passage of the *No Child Left Behind Act* in 2001 put pressure on districts and states to improve the performance of failing schools 'and created a climate where districts were more apt to hire corps members' (Scroggins, *Interview*, 2017; Williams, 2006). Teach for America, was by this time, a relatively widely known 'off-the-shelf' teacher quality intervention, and increasingly became part of the superintendent's performance improvement 'toolkit' (Kramer, *Interview*, 2017b). With its explicit focus on 'data-informed' instruction in order to raise test scores and close achievement gaps, TFA channelled the *zeitgeist* of the NCLB era (Brewer, *Interview*, 2017; Huffman, *Interview*, 2017). 'If you're a district superintendent, if you're a principal, you think, "I know this might make a lot of people mad, but [hiring TFA] is the only way to get my test scores up"' observers Schneider (*Interview*, 2017).

The new strictures of the NCLB era – the emphasis on ‘measurable gains’ and test-based accountability – also empowered a wave of ‘non-traditional’ superintendents and system leaders, many of whom had a background in business rather than education (Brill, 2011; Williams, 2006). Several of these figures became important champions for TFA’s growth in new and existing regions. Joel Klein, the Chancellor of New York City schools, under Mayor Michael Bloomberg, typified the new breed. Klein was a highly unusual choice to lead the nation’s largest school district, having had a long career in corporate law and no significant prior professional experience in the education sector. One of his first calls as Chancellor was to Wendy Kopp to enquire how he might secure more TFA teachers for NYC schools (Brill, 2011). By 2006, nearly 10 percent of the city’s new hires were coming from TFA. ‘Generally, the TFA teachers are much less excuse-bound and more entrepreneurial and creative’ enthused Klein. ‘I’ve got 1,000 [TFA] teachers affecting 70,000 or 80,000 kids, and I keep ramping it up (quoted in Sellers, 2006).

The NCLB era also saw increased churn in superintendents, as individuals who had raised test scores in one district were snapped up by another jurisdiction seeking similar improvement (Brill, 2011). These peripatetic superintendents served as vectors for the diffusion of TFA. For instance, Dr Carol Johnson, who as superintendent of Memphis schools had overseen the adoption of TFA in 2006, subsequently championed its introduction when she moved to head up Boston Public Schools in 2007 (Biber, *Interview*, 2017; Vaznis, 2009). Similarly, Paul Vallas, who had been instrumental in getting TFA into Chicago in 2000, eased TFA’s passage into Philadelphia in 2003, and swelled the organisation’s footprint in post-Katrina New Orleans when he took over the state-run Recovery School District in 2007. ‘These people move around so much’ and ‘superintendents who had been in one place saw the impact of the [TFA] teachers and

alumni and would say [to us] “you have to come here” – that happened multiple times,’ recalls Kopp (*Interview*, 2017).

No Child Left Behind helped Teach for America in another respect too. Teachers unions, who in other circumstances might have taken a more aggressive stance against a burgeoning TFA, were preoccupied with the much more immediate and large scale threats posed by the strictures of federal reforms. National Education Association [NEA] and American Federation of Teachers [AFT] members were contending with new testing and accountability regimes and the threat of federal sanctions if schools could not demonstrate that students were making ‘adequate yearly progress’ (Mehta, 2013). As West observes, throughout the NCLB era, ‘the unions had much bigger fish to fry’ than TFA – an organisation much admired by most political elites because of its ‘common sense appeal’ (*Interview*, 2017). ‘The unions were embattled in so many other ways...are they going to come out and pick this fight with an organisation that had a pretty pristine image?’ concurs Schneider (*Interview*, 2017). This assessment is corroborated by TFA’s director of government affairs from 2001 to 2005, Monica Healy: ‘[the unions] didn’t perceive us as a big enough threat then...Federally, the NEA and the AFT had big agendas. They didn’t like us, but they weren’t going to waste their chits on TFA when NCLB was still working its way through the system.’ ‘Nowadays’ she adds, ‘they’ve recognised that TFA is providing the reformers who are running the school systems and *that* is what I think the unions fear’ (*Interview*, 2017).

‘Boundary Maintenance’ in order to remain ‘under the radar’

While *No Child Left Behind* was a boon for TFA in many respects, it also threw up a major existential challenge for the organisation and forced a reluctant and extremely rare foray

into direct policy advocacy. Initial drafts of the NCLB bill proposed that by the end of the 2005-06 school year, every American child would be taught by a ‘highly qualified teacher’ – in other words, someone who had ‘obtained full State certification as a teacher...or passed the State teacher licensing examination and holds a license to teach in such state’ (No Child Left Behind, 2001, sec. 9101). Had this definition stood, it would have precluded alternatively certified candidates, including TFA-participants, from teaching while they worked towards a qualification. It was a fundamental threat to TFA’s operating model.

Up until this juncture, the Teach for America organisation had never tried to directly influence policymaking. While it actively encouraged and abetted *alumni* participation in politics and policymaking, TFA had never seen itself as an interest group (Kopp, *Interview*, 2017). In 2001 the organisation had no government relations strategy or personnel, and no presence on Capitol Hill, nor in key State Houses (Mead et al., 2015). TFA left policy advocacy to its alumni and to other reform groups, assuming, somewhat naively, that ‘their ideas, the quality of their program, and the urgency of the need would make things happen’ (Huffman quoted in Russo, 2012, p. 3). The ‘NCLB crisis’ compelled TFA to develop quickly its federal lobbying capacity and to cultivate strong ties with key Congressional figures in order to get the regulations on teacher certification revised (Huffman, *Interview*, 2017).

Securing a carve-out proved relatively straightforward because ‘nearly everybody wanted to allow TFA teachers to remain eligible to teach in high poverty schools,’ and TFA was broadly supported across the divide, according to long-time Democratic staffer Charles Barone (quoted in Russo, 2012, p. 6). ‘Democrats liked us because of the service element

– that we got really good kids going into teaching; Republicans liked us because we were reformers in education and because of the perception that unions didn’t like us’ recalls Monica Healy (*Interview*, 2017). Ultimately, TFA secured a legislative interpretation that permitted not just TFA trainees, but all sorts of other alternatively certified candidates to be considered ‘highly qualified,’ with profound consequences for the growth of the alternative certification sector in years to come (Russo, 2012). This loophole was shored up some eight years later, when TFA instigated a continuing resolution of US Congress, and again in 2013 – a feat *Politico* considered a ‘huge victory’ for TFA because it ‘flattened a coalition of big-name opponents, including the NAACP [National Association for the Advancement of Colored People], the National PTA [Parent-Teacher Association] and the NEA (Simon, 2013).

Out of the NCLB wrangling TFA secured powerful backers on both sides of the aisle, which would assist it to secure major federal grants throughout the 2000s. Between 2001 and 2011, TFA’s federal funding increased more than ten-fold (Healy, *Interview*, 2017; Russo, 2012). ‘I don’t think you could find anybody who’s more politically effective in securing funding and provisions that affect their program’ said Jane West, vice president of the American Association of Colleges of Teacher Education (AACTE) (quoted in Russo, 2012, p. 13). Yet it is telling that having developed such a formidable lobbying capacity, Teach for America did not throw its political heft behind other campaigns for education reform. This ‘boundary maintenance’ was a very deliberate decision of the organisation’s leadership, even though it annoyed some allies who felt that TFA should have publicly supported the reforms that they were quietly abetting and benefitting from. ‘TFA’s for TFA. They want people to be with them when they’re in the breach, but it tends to be a one-way street,’ remarked a former Bush administration education official

(quoted in Russo, 2012, p. 9). ‘We’re a leadership organisation, not a political organisation’ counters then Vice President Matt Kramer (quoted in Kamenetz & Westerfelt, 2014).

TFA’s leadership understood the paradox that publicly advocating a reform agenda could impede its goal of realising it. The core work of recruiting, cultivating, and placing reform advocates at the heart of the system required TFA to maintain an outwardly ambivalent or agnostic stance on many of the burning questions of the day. ‘Folks in the reform community always wanted TFA to take more “positions”’ recalls Kevin Huffman. But Kopp and others were fearful that coming out in support of NCLB’s more controversial measures, or in favour of teacher tenure reforms and charter school expansions could result in adverse scrutiny for the program and increase resistance among school districts and superintendents to opening new TFA sites (quoted in Russo, 2012). As Kopp herself reflected in 2010:

Education reform needs a bigger, better Teach for America a lot more than it needs to know my views on charter schools...If we’re going to maximise Teach for America’s impact we can’t afford to turn off the people who have opposing views on charters (quoted in The Economist, 2010)

In short, TFA’s capacity to shape the system depended on its ability to maintain relationships with traditional school system leaders and stakeholders, even as its alumni were directly challenging that system. ‘TFA doesn’t want to piss off the districts – the employers of their teachers’ observes Richard Riordan, the former Los Angeles Mayor and secretary of education for California from 2003 to 2005. ‘And it doesn’t want to get into fights with the unions,’ (quoted in Foote, 2008, p. 35). TFA recognised that union forbearance of the organisation and its program was increasingly fragile towards the end of the 2000s, and being a prominent cheerleader for choice and accountability reforms risked rupturing an uneasy peace (Mead et al., 2015). Maintaining outwardly ambiguous

preferences on policy questions became more difficult in coming years, however. As growing numbers of TFA alumni became more prominent and consistently associated with the nostrums of the reform movement, TFA was increasingly tarred with the same brush as reform groups that *explicitly* assailed teachers' unions, traditional school districts, and schools of education as obstructionist and underperforming.

In summary, TFA grew precipitously during its second decade due to endogenous and exogenous developments. Adroit internal repositioning enabled TFA to exploit a new stream of philanthropic funding, recruit more extensively, and expand to many new regions. TFA approached the expansion process cautiously and strategically, prioritising 'easy entries' and devoting more resources to regional expansions where union antagonism was anticipated. TFA was also aided by the fact that union leaders continued to perceive the organisation as a teacher labour solution, not a catalyst for systemic reform. Additionally, the federal policy climate was broadly conducive to growth, first because NCLB put pressure on districts to innovate in order to raise performance and second, because it distracted teachers' unions from comparatively 'small fry' concerns like a burgeoning Teach for America. Critically, the disaggregated nature of TFA's growth and the organisation's strategic aversion to position-taking in education reform debates belied the fact that TFA was, by decade's end, a significant source of systemic disruption, as the ensuing section details.

Growing Alumni Impact through Layering and Infiltration

As TFA underwent its dramatic second decade growth spurt, alumni were scaling up alternate models of schooling and teacher training, instigating state and district level policy changes as advocates and elected officials, and moving into increasingly influential

positions within the education bureaucracy. The cumulative significance of these developments is, however, much more discernible in retrospect than it was to many subsystem actors as it unfolded. While some of the most important ‘spin-offs’ from TFA were founded in the 1990s, it was not until the mid-to-late 2000s that their wider significance became apparent. As Jerry Hauser observes ‘[TFA-instigated] reforms and innovations started small...we were under the radar until very recently’ (*Interview*, 2017). Today, there is broad consensus across the scholarly and popular literature that TFA has had an important and observable influence on education policy and practice in the United States (Brewer et al., 2018; Brill, 2011; M. Higgins et al., 2011; Kretchmar et al., 2014, 2018; Mehta & Teles, 2012; Ravitch, 2014). This section surveys, and where possible, quantifies the various dimensions of Teach for America’s influence on the contemporary structure of American schooling. I find that TFA’s pattern of innovation is congruent with the conception of layering theorised in Chapter 3. In other words, TFA and its alumni instigated and popularised new ways of doing things which, over time spread throughout the system and have undermined its traditional logic and coherence. Similarly, as anticipated in Chapter 3, TFA alumni progressively infiltrated key posts within the education bureaucracy and used their positions to enact, in some instances, truly dramatic changes.

Capturing the overall impact of TFA is not straightforward. This is not a question that can be comprehensively answered with a neat experimental research design nor a regression analysis. The organisation’s influence spans multiple levels of government, and varies across regions and different aspects of the system. Instead, I break up the notion of ‘impact’ into different dimensions, and synthesise extant quantitative and qualitative analyses with my own data to construct an answer to the counterfactual question: how

would the American education system be different if Teach for America had never existed? The resulting picture is inevitably impressionistic, but the aggregation of many pieces of evidence provides a strong basis for concluding that by 2009, TFA had instigated and significantly accelerated the growth of non-traditional schools and alternative approaches to teacher training, and abetted the passage of reforms to teacher tenure and evaluation. Moreover, TFA's alumni network and organisational allies constituted a significant new source of power and influence on policymaking at all levels of government.

'Layering' Innovations in Teacher Training and School Structures

By the end of its second decade, it was increasingly apparent that TFA was a prodigious source of entrepreneurs in the education sector. In 2011, Higgins *et al* polled education experts and donors to generate a list of the 50 most influential entrepreneurial organisations or ventures in contemporary K-12 education. Many of these organisations were founded or led by TFA alumni (i.e. New Leaders for New Schools, NewSchools Venture Fund, Teacher U, the New Teacher Project), and an association with TFA was, by some margin, the most common element in the work histories of the top managers of these organisations (M. Higgins et al., 2011). The authors of this study speculate that TFA's fecundity in this regard is due to 'the criteria by which TFA recruits, the organisation's strong and purposive culture, the skills that corps members develop, and the opportunities provided to alumni.' Moreover, 'by providing talented young college grads with classroom experience, TFA confers upon them a degree of credibility that opens doors that might open less readily for others' (2011, p. 24). A more recent analysis of Forbes 30 under 30 winners corroborates that TFA is a prolific producer of entrepreneurs in the education and social sectors. In the past 5 years, TFA alumni have made up, on average, 5.4 of the 30 under 30 winners in the Education division (Brewer

et al., 2018). They have also featured in other prize divisions such as healthcare, law and policy, and social entrepreneurship³⁹. Below, I chart the development and import of some of the most notable TFA-spawned innovations.

Alternative Certification

While TFA was by no means the first alternative certification (AC) program and TFA teachers have only ever comprised a fraction of alternately trained teachers, the organisation has been instrumental in legitimating and popularising AC programs in the United States, as well as internationally, through the Teach for All network.⁴⁰ Teach for America is by far the best known AC program and serves as a ‘totem’ for AC models at large. The organisation’s public profile, connection to blue chip companies, and the elite educational backgrounds of many participants helped to legitimise AC programs in the minds of many policymakers throughout the 2000s (Hess, *Interview*, 2017; Kretchmar et al., 2018; Russo, 2012). ‘TFA is 10 percent of alternative certification but has 100 percent of the political clout,’ observes Jane West, former vice president of the American Association of Colleges of Teacher Education (quoted in Russo, 2012, p. 11). As canvassed above, when debate over the interpretation of the ‘highly qualified teacher’ stipulation in the NCLB Act threatened the viability of alternative pathways, TFA almost single-handedly carved out a loophole to ensure that AC teachers would be deemed ‘highly qualified’ under the law. The significance of this legislative victory extends well beyond keeping TFA operational, however; it created the regulatory space for a dramatic

³⁹ This statistic was calculated using Brewer *et al*’s (2018) data, and data compiled by the author for the years 2018 and 2019. Data was sourced from TFA press releases, the Forbes 30 under 30 website, and LinkedIn profiles.

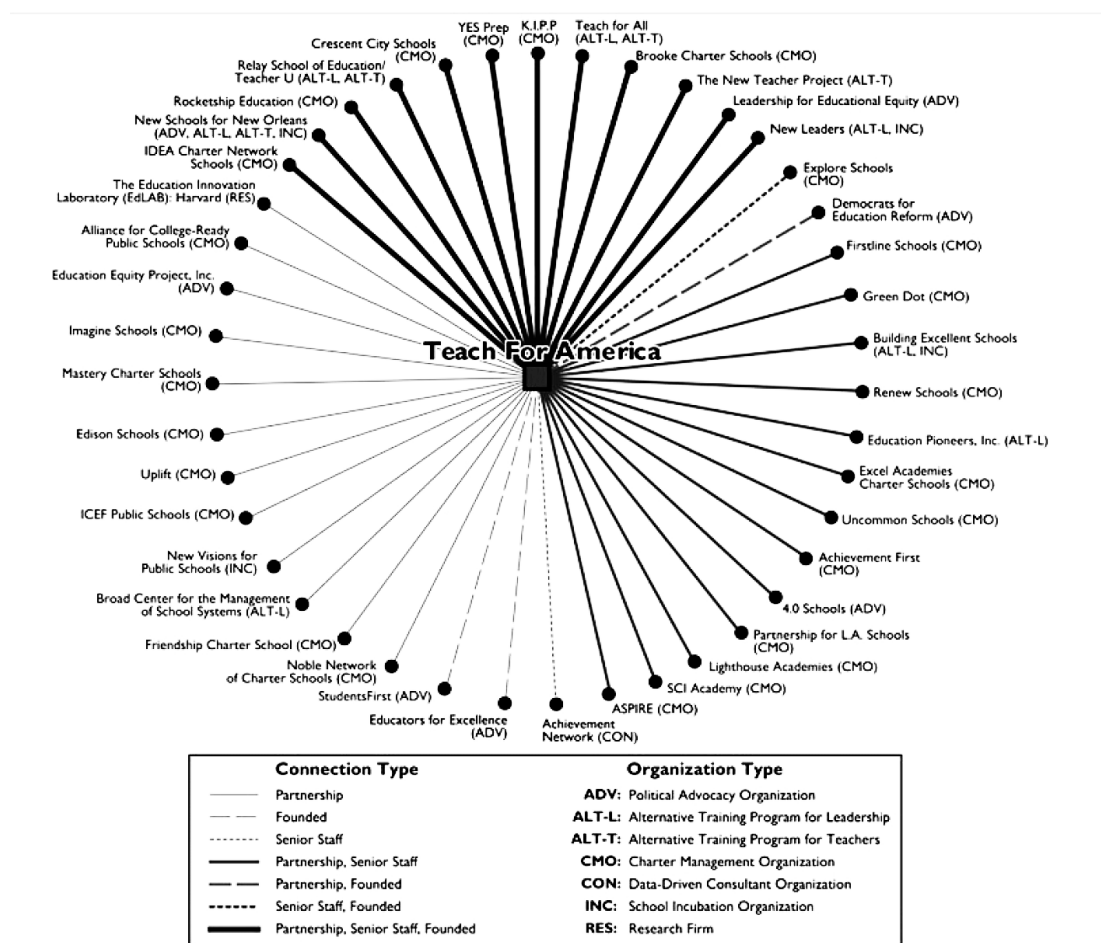
⁴⁰ Alternative certification is defined as the provision of training and credentials largely outside of university systems (Kretchmar et al., 2018). TFA is especially associated with the dramatic growth of fast track AC programs that take a ‘technocratic’ approach to pedagogy, and are aimed at those intending to teach at under-resources schools.

expansion of other alternative certification schemes from the early '00s onwards (Barone, Interview, 2017; Kretchmar et al., 2018; Russo, 2012). At present, nearly one in four new teachers enters the profession through some means other than the traditional four-to-five year university-based program. By comparison, in the 1999-00 school year only one in eight teachers was alternatively certified (Redding & Smith, 2016).⁴¹

In addition to cultivating political support and creating the regulatory space for AC schemes, TFA has directly 'spun-off' large and prominent AC providers. A recent network analysis by Kretchmar *et al* (2018, p. 430) locates TFA as the 'central transmitting node within a network of jurisdictional challengers...defined as "organisations that compete with or offer alternatives to public sector institutions (Mehta & Teles, 2012, p. 8)."' TFA alumni have founded and/or lead many of the largest alternative certification providers. In other instances, TFA has formal documented partnerships with these organisations. This TFA-centric network (reproduced at Figure 7, below) has substantially eroded the traditional campus-based model of teacher education by providing credentials outside of university systems; creating demand for fast-track programs; supporting legislation to challenge traditional providers; and shifting 'common sense perceptions about what constitutes effective teaching' (2018, pp. 425–435).

⁴¹ The effects of this shift away from university-based training are contested. While alternately certified teachers tend to be more ethnically diverse, there is some evidence that they have lower rates of retention than their traditionally trained counterparts. With regard to quality, most studies find no significant difference in the aggregate performance of traditionally versus alternatively certified teachers (Redding & Smith, 2016).

Figure 7: Teach for America's connections to organisations involved in the liberalisation and diversification of teacher education



Source: Kretchmar et al, 2018; Note: KIPP = Knowledge Is Power Program; CMO = charter management organisation

Kretchmar *et al* consider the shift away from traditional approaches to teacher education – those steeped in socio-cultural and pedagogical theory and based in university settings – towards fast-track ‘technocratic’ and ‘behaviourist’ approaches to be highly problematic: ‘these teacher preparation programs may potentially train efficient technicians to work in schools that adhere to the ‘no excuses’ model, but they may fall short of educating and preparing educational experts, who are willing and capable of critically analysing and responding to the regressive approaches to education under market-based models’ (2018, p. 439) Others counter that alternative certifications schemes are a welcome antidote to traditional teacher training which is heavy on

pedagogical and sociological theory but skimps on essential classroom skills (Levine, 2006; Walsh & Jacobs, 2007). Among the more notable proponents of alternative teacher preparation are The New Teacher Project, and New Leaders for New Schools. Their legacies are discussed below.

The New Teacher Project (TNTP) emerged out of TFA in 1997 when Kopp sought out Michelle Rhee to run the incipient organisation (Brill, 2011). TNTP began as a teacher recruitment training provider in the mould of TFA though it tended to target mid-career professionals wanting to re-train as classroom teachers rather than recent college graduates. By the end of its first decade, TNTP had trained and placed roughly 43,000 teachers, but the more notable impact of TNTP has been as a consultancy and think tank (Kretchmar et al., 2018). In the early 2000s the organisation began to advise districts and publish research on recruitment, training, retention, and evaluation policies. Among other contributions, TNTP has directly instigated and overseen contract reforms in many large school districts, such as New York City, Chicago, Newark, and Memphis. Under the direction of TNTP these districts now mandate merit- rather than seniority-based hiring and layoffs, and promote the retention of high-performing teachers through financial bonuses and other incentives (Brill, 2011).

Whereas TFA was reticent to take public positions on policy throughout the 2000s, TNTP advocated very publicly for policy change, publishing widely-cited reports, testifying at state and federal education committee hearings, issuing press releases and authoring op-eds in national broadsheets. Some of these forays into policy advocacy made a significant impression on policy debates. In June 2009, TNTP published a much-cited report entitled *The Widget Effect*, that inveighed against the ‘institutional indifference to variations in

teacher performance’ and called for systematic test-score based evaluation methods and pay scales that rewarded measured performance not seniority (Weisberg et al., 2009). The report was a ‘triumph of advocacy research’ (Reckhow & Tompkins-Stange, 2018, p. 276). Within weeks of its release, Education Secretary Arne Duncan invoked *The Widget Effect* in a speech to the National Education Association (the largest teachers’ union in the US):

I believe that teacher unions are at a crossroads. These [tenure and evaluation] policies were created over the past century to protect the rights of teachers, but they have produced an industrial factory model of education that treats all teachers like interchangeable widgets. A recent report from the New Teacher Project found that almost all teachers are rated the same. Who in their right mind really believes that? We need to work together to change this (2009).

It was by no means the only time that senior Obama administration officials would use TNTP research to justify federal initiatives aimed at changing how states and districts managed school workforces (Decker, 2012; Layton, 2015b).

Another TFA spin-off that has proven influential in the recruitment, development, and management of school workforces is New Leaders for New Schools (NLNS). The business plan for NLNS was developed at Harvard Business School by TFA alumnus Michael Johnston along with a handful of other MBA classmates, including Jon Schnur who would go on to be the architect of the Obama Administration’s Race to the Top program. Similar to The New Teacher Project, NLNS was a non-profit that focused on improving the talent pool of principals for high need schools. Launched in 2001, NLNS applied corporate sector recruitment methods to identify and train candidates who would have ‘two core competencies: the capacity to observe, supervise and improve their teacher’s classroom performance’ and ‘the management skills to use their school’s manpower and money effectively,’ two things that state principal certification exams did not then screen for (Brill, 2011, p. 82). Within two years NLNS had raised \$5 million from many of the same donors that supported TFA; within a decade it had trained and placed over 700

school principals. The organisation would go on to play an especially important role in recruiting principals for the New Orleans school system in the wake of Hurricane Katrina. Longer term, NLNS has influenced several states to develop regulations and principal evaluation models and worked with traditional education faculties to modify principal preparation programs (New Leaders, 2019).

Charter Schooling

Throughout the 2000s, Teach for America's dramatic expansion abetted the rapid growth of the charter school sector.⁴² Charters take diverse forms (indeed, that is one of their major attractions for adherents), but TFA has been especially influential in founding and growing so-called 'no-excuses' charter schools that serve low-income students in predominantly urban areas. These schools promote an uncompromising focus on academic attainment and oftentimes pursue this aim through rigorous behaviour codes and extensions of the school day and year (Thernstrom & Thernstrom, 2003). A number of large-scale econometric evaluations have shown that these 'no excuses' schools enhance student tests scores and close performance gaps on assessments (Angrist et al., 2011; Hoxby & Murarka, 2007; Nichols-Barrer et al., 2016; Roland G. Fryer, 2014; Tuttle et al., 2010). TFA alumni are founders and leaders of some of the biggest and best known of the 'no-excuses' franchises (such as KIPP, IDEA, YESPrep, and Rocketship), while TFA corps members and alumni provide much of the human capital of the 'no excuses' charter sector at large. According to Ethan Gray, a senior figure in charter schooling and education reform circles:

TFA was viewed and is still viewed by many charter operators as a non-negotiable for them to enter a new geographic market. There has to be TFA in place for

⁴² Between 2000 and 2015 charter school enrolments grew six-fold. In some regions, such as Washington DC and New Orleans, charter networks now comprise at least half of all schools (National Center for Education Statistics, 2018c).

charter school operators to even consider growing. And for philanthropists who are interested in expanding the number of high performing charter schools in their city, the talent to support the growth of those charter schools is necessary (*Interview*, 2018)

TFA's embrace of explicit instruction, its focus on 'measurable gains' and data-informed instruction, and its determination to provide opportunities to the most deprived dovetailed neatly with the 'no-excuses' charter model (Brewer, *Interview*, 2017; Trujillo & Scott, 2014). These schools often rely on highly dedicated staff prepared to be held to tough accountability standards, and to work longer hours for the same or less pay than their unionised counterparts in traditional public schools.⁴³ These are conditions conducive to burnout and high teacher turnover (Brewer, 2014; Brill, 2011).⁴⁴ But through formal partnerships with TFA, 'no excuses' charter networks ensure an uninterrupted pipeline of devoted *wunderkinds* willing to take the place of burnt out veterans (Brewer, 2014; Kretchmar et al., 2014). Wendy Kopp argues that 'strong schools can withstand the turnover of teachers' because 'they develop their teachers tremendously so they become great in the classroom even in their first and second years' (quoted in Rich, 2013). Yet large-scale aggregate studies suggest that, all else equal, teacher turnover harms student achievement (Ronfeldt et al., 2013).

In March 2017, I conducted an analysis of TFA's footprint on the 'no excuses' charter sector. To construct a manageable sample to survey, I took the list of charter school networks supported by the National Charter School Growth Fund (NCSGF) – a venture capital organisation that aims to 'accelerate the growth of the nation's leading charter school networks.' The NCSGF identifies as 'high performing' charter networks serving

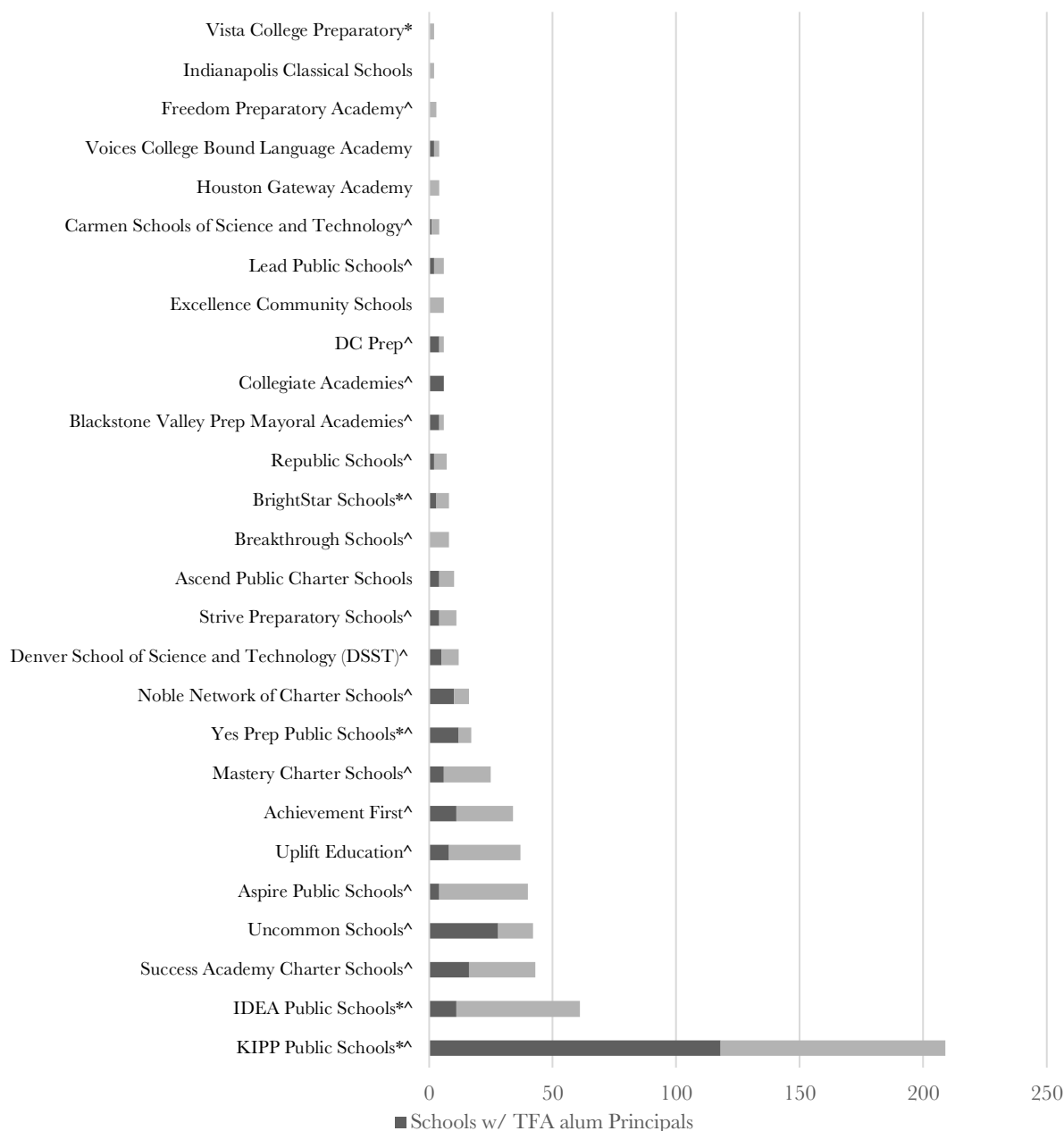
⁴³ For instance, at the highly regarded large Texas based charter network YES Prep (founded by TFA alumnus Chris Barbic) teachers are assigned a cellphone to answer student calls about homework until 9pm (Rich, 2013)

⁴⁴ In 2013, the *New York Times* reported that teachers YES Prep have an average of only two and a half years' experience. At Achievement First, teachers stay an average of 2.3 years; at Success Academy, a network based in New York City, and KIPP the average tenure is around 4 years (Rich, 2013)

low-income families, whose academic results significantly exceed those of their local, state, and national peers (National Charter School Growth Fund, 2017). The two biggest networks supported by the NCSGF are KIPP (Knowledge is Power Program), which operated 209 schools in 2017 and IDEA (then operating 61 schools). Both were founded and are presently led by TFA alumni. Figure 8, below, shows the preponderance of TFA alumni in the high-performing charter school sector as both founders and senior personnel. Across the 27 charter school networks supported by the NCSGF as at March 2017, an average of one in three schools was led by a TFA alumni principal. Among the ten biggest networks, TFA alumni constitute 40% of school leaders.

Another indicator of TFA's outsized contribution to the high-performing charter school sector is the preponderance of alumni-founded networks and TFA partners in the list of Broad Prize winners. Awarded annually since 2012, the Broad Prize for Public Charter Schools recognises 'the public charter management organisation that has demonstrated the most outstanding overall student performance and improvement among the country's largest charter management organisations...while reducing achievement gaps for poor and minority students' (Broad Foundation, 2012, p. 1). Three networks founded by TFA alumni, YES Prep, KIPP Schools, and IDEA Public Schools, have won the Broad Prize (in 2012, 2014, and 2016 respectively) and every winning charter network has a formal agreement with Teach for America for the placement of corps members in its schools, suggesting a not insignificant reliance on TFA for staffing needs.

Figure 8: Teach for America Presence in High Performing Charter School Sector (March 2017)



CMOs are deemed 'high-performing' if they qualify for support from the National Charter School Growth Fund

* Denotes a CMO founded by a TFA alumnus

^ Denotes formal partnership with TFA

Data on CMO principals was compiled by the author using CMO websites and LinkedIn profiles

The best known and largest of the TFA-spawned charter networks is KIPP. The development of the KIPP network somewhat mirrors the evolution of TFA itself, and represents a classic instance of institutional change through *layering*. KIPP began in a poor

neighbourhood of Houston in 1994. TFA corps members and employees of the Houston Independent School District, Mike Feinberg and Dave Levin, began to experiment in their classrooms with longer school days and years, strict discipline regimes, and explicit instruction methods that aimed to dramatically improve the learning of predominantly Hispanic children from local housing projects (Mathews, 2009; Mosle, 2009). Houston school administrators found Levin and Feinberg's disregard for established practice and deviations from district protocols an irritation, but tolerated their experiments because their efforts were serving a population of students for whom little else was being done (Mathews, 2009). Encouraged by their early results, in 1995 Feinberg opened a stand-alone middle school in Houston, and Levin did the same in New York City. By 1999 both schools were dramatically out-performing schools serving similar students in Houston and NYC, were massively over-subscribed, and had begun to attract the attention of senior policymakers and philanthropists who wanted to see the model expanded. A \$15 million grant from the Fisher Foundation in 2000 allowed KIPP to scale dramatically. Grants from many of the same donors who have supported TFA over the years have permitted KIPP to open new schools every year since 2000 (Mathews, 2009). Today, KIPP operates 224 schools in 29 regions and constitutes the largest non-profit charter network in the United States (KIPP, 2019). In March 2017, close to 60% of KIPP's principals were TFA alumni. Demand for KIPP schools continues to outstrip the number of places available, even as the network has scaled rapidly. Other TFA-founded charters have followed similarly dramatic growth trajectories, amassing sizeable and devoted constituencies in the regions they serve. For instance, the IDEA network, founded in 2000 by alumni Tom Torkelson and JoAnn Gama in Texas' Rio Grande Valley, plans to operate 173 schools in 10 regions, educating 100,000 students, by 2022 (Phillips, 2019).

Yet KIPP and its ilk are significant for more than just their size and the pace of their expansion. These networks have had a powerful demonstration effect, showing that marginalised and impoverished students can achieve high academic standards with certain interventions (Brill, 2011). From the early 2000s onwards, Republican and, in turn, Democratic policymakers used KIPP's robust academic performance to justify growing federal and state support for charter school expansion overall. For instance, in the 2000 presidential election debates, George W Bush cited KIPP as a 'proof point' for what is possible when 'we consolidate the system to free the schools and encourage innovators' (Bush, 2000). As a presidential candidate and as president, Barack Obama, likewise repeatedly invoked KIPP as an exemplar when he announced federal subsidies for charter expansions and urged states to lift caps on charter school numbers (Brill, 2011). In short, KIPP was regarded as embodied proof of the viability of the charter model. Moreover, the network showed that high standards of academic attainment can be achieved on a systemic scale – something that many doubted when KIPP first came to prominence in the late 1990s.

Because KIPP was devoted to low-income and minority students, its success resonated particularly strongly with a number of Democratic party policymakers in the mid-to-late 2000s, most notably Barack Obama and Cory Booker. Both men applauded the opportunities that KIPP and like networks were providing for communities of colour and invoked KIPP in their endorsements of charter schooling in general (Brill, 2011; Russakoff, 2016). These full-throated endorsements came at some cost, and exposed a growing rift between the technocratic reformist wing of the Democratic Party and its older labourite wing. In the 2008 presidential primary, Obama lost the NEA and AFT's endorsements to Hillary Clinton. Yet Obama – a charter school supporter and sometime

critic of teachers unions – would go on to win the 2008 Democratic primary, and the subsequent general election – marking an important watershed in Democratic party education politics. ‘[KIPP] changed the whole debate’ claims Whitney Tilson, an early TFA staff member, KIPP patron, and founder of Democrats for Education Reform:

If you look back before the early days of KIPP and Teach for America, there was basically no evidence anywhere that would rebut the pernicious lie that demography is destiny...KIPP was a “black swan.” The mere existence of one black swan proves that all swans are not white...it changed the whole discussion, from ‘oh don’t blame us and just shut up and give us more money’ to ‘wow, so it actually is possible, to take a majority of kids, even from the most difficult circumstances, motivate them and educate them to a high level. And it’s hard for me to see that much of that would have happened without TFA. (*Interview*, 2017)

While the broader implications of KIPP’s record and approach are hotly contested, on this last point, the boosters and detractors agree. Says Diane Ravitch, ‘TFA is the workforce that makes thousands of new charter schools possible’ (*Interview*, 2017).

Infiltrating Policymaking

Twenty years in, TFA was having an increasingly discernible effect on the education system not simply through innovations that challenged traditional structures, but also through capturing and exerting power within the traditional decision-making apparatus of the system. TFA alumni were building policy advocacy groups to rival the traditional union preponderance over policymaking and in a growing number of states and districts, and alumni were entering positions of significant bureaucratic power and unleashing major reforms.

State Level Policy Advocacy

To date, the most comprehensive and robust effort to quantify TFA’s effect on education policy is Finger and Lastra Anadon’s (2018) analysis. Using instrumental variables and survival models to control for confounding factors, the authors find that the presence of a

TFA corps in a given state is not merely a manifestation of a broader reforming trend, but rather an independent catalyst and accelerant of education reform at the state level between 1990 and 2013⁴⁵. They show that the presence of a TFA corps is strongly linked to the passage of state-level charter school laws, private school choice programs, and the number of years of compulsory education. They find weaker but still positive relationships between TFA and tenure repeal, performance pay, the introduction of high school exit exams, and increases in per pupil spending. The presence of TFA notably increases the number of education reform advocacy groups in a state and the authors provide qualitative evidence that advocacy activity by TFA alumni is the likely mechanism by which TFA induces state-level policy changes. My own data on state-level education advocacy networks corroborates that TFA alumni play a very prominent role in this sphere. The Policy Innovators in Education (PIE) Network is the peak national association of reform organisations. PIE affiliates are required to have a pro-education reform agenda and be active legislative advocates on issues such as expanding school choice and merit-based teacher compensation (PIE Network, 2019). In 2018, over forty percent of all PIE Network organisations were led by TFA alumni⁴⁶.

⁴⁵ Finger and Lastra Anandon use class size reduction laws and lagged birth rates as instrumental variables in order to isolate the effect of TFA from the unobserved political factors that might drive both the introduction of TFA *and* various education reforms. Class size reductions and higher birth rates (lagged) create teacher shortages and therefore predict demand for TFA, but they do not affect the dependent variable. Reformers who favour charter schools, performance pay, tenure reform (etc.) generally regard class size reduction as ineffective and expensive to boot. This IV therefore permits an estimation of the effect of TFA on education reform activity, net of unobserved factors that might also be correlated with the very reform activity that the authors seek to explain. Various permanent state characteristics and time-varying factors (such as state ideology, state government, partisanship, and union membership) are controlled for. Survival models confirm the posited direction of the causal relationship – i.e. that the introduction of TFA precedes and therefore can be assumed to precipitate the passage of reforms. These models also show that reforms were adopted more slowly or not at all in states that have never introduced a TFA corps. Finally, the authors provide qualitative evidence of *how* TFA generates reform activity by presenting a case study of the New York and Minnesota chapters of Educators for Excellence (E4E) – an advocacy group founded by TFA alumni which aims to (and does) influence policy much as a think tank would (i.e. by disseminating research, meeting with policymakers, testifying at school board and state committee hearings, and public campaigning).

⁴⁶ As at 19 October 2018. Data collected by the author from PIE, biographies on affiliate websites, and LinkedIn profiles.

A clear illustration of TFA advocacy directly affecting changes in state legislation can be found in Mississippi. The education non-profit Mississippi First, founded by TFA alumni Rachel Canter and Sanford Johnson has been credited with increasing access to sex education in the state, helping to pass legislation to legalize new charter schools and, writing the legislation that created the state's first-ever state-funded pre-kindergarten program which started in 2014 (Mader, 2014). The State legislator who introduced the pre-K bill, Brice Wiggins, insists that the legislation would not have been written without Canter and Johnson's intervention: 'to do this type of policy takes people outside of the elected officials. We just don't have the resources or the expertise' (Mader, 2014).

Increasing Bureaucratic Power in Major Districts

By 2009, several TFA alumni had risen to senior and influential positions in major urban school districts. The organisation's annual report that year identified five alumni superintendents leading large urban public school districts, 357 principals, dozens of district school board and state board of education members, a state senator, and more than 500 alumni working on Capitol Hill, in state politics and in state and federal advocacy organisations (Teach for America, 2009). In New Orleans, TFA alumni were presiding over a dramatic overhaul of the state's education system after Hurricane Katrina swept away much of the physical and human infrastructure of the previous regime (Moe, 2019). The radically different system that emerged in the years following Katrina is largely the product of a consortium of organisations led by TFA alumni.

Rather than reopen the 100 schools that had been under the jurisdiction of the Orleans Parish School Board, the State made them charters under the auspices of the Recovery School District (RSD) Bill of 2003. With the help of TFA, the New Teacher Project, and

New Leaders for New Schools, the RSD recruited large numbers of new teachers and principals and rehired existing ones on non-union contracts. By 2012, TFA corps and alumni constituted 30% of all new teachers in Greater New Orleans (Kretchmar et al., 2014). A new organisation, New Schools for New Orleans, founded by TFA alumna, Sarah Usdin, managed the opening of dozens of new charter schools – many of which were themselves founded and led by TFA alums (for instance, KIPP, Collegiate Academies, Crescent City Schools, Success Preparatory Academy). In November 2011, the New Orleans *Times-Picayune* said of TFA: ‘they’re everywhere’ and noted that ‘some of the schools in New Orleans that have consistently shown the best value-added results rely heavily on Teach for America’ (Vanacore, 2011).

The entire Louisiana system is now overseen by TFA alumnus John White, who served as head of the Recovery School District, before ascending to State Superintendent of education in 2012. The result of all this activity is that New Orleans is now home ‘to the most radically different school system in the entire country’ (Moe, 2017, p. 7). Over 94% of students attend charter schools and test scores and graduation rates have risen significantly since 2005 (D. N. Harris & Larsen, 2018). In January 2010 the then Secretary of Education, Arne Duncan courted controversy when he declared that Hurricane Katrina was ‘the best thing that happened to the education system in New Orleans...it took the devastating tragedy of the hurricane to wake up the community to demand more and expect better for their children.’ The then state superintendent of education Paul Pastorek concurred: ‘I know it’s a strong statement, but it’s actually quite accurate. It was a pathetic system before the storm.’ (quoted in Anderson, 2010).

Though Arne Duncan and, indeed, Terry Moe, are absolutely right that such a wholesale transformation in New Orleans would not have been possible without the exogenous shock of a hurricane eradicating the incumbent interests that had ‘kept the lid on reform’ (2019, p. 73), it is likewise inconceivable that New Orleans would look the way it does today without the intervention of TFA and allied organisations. Had Katrina hit a mere decade earlier, there would have been no New Leaders for New Schools, and no New Teacher Project. In 1995, KIPP was operating out of a single portable classroom in Houston (Mathews, 2009), TFA was a contingent start-up with fewer than 500 corps members nation-wide and a handful of teachers in Louisiana (Kopp, *Interview*, 2017), of which Sarah Usdin was one, having just finished her TFA-stint in Baton Rouge (New Schools for New Orleans, 2019). There was no national reform movement much to speak of. ‘Rather than today’s organised “reform community”...there was a loose coalition of educators, state officials, professors, and gadflies’ (Hess, 2017). In 1995, the reform movement quite simply did not have the organisational wherewithal to move into the vacuum created by the destruction of the old regime. More likely than not, in the absence of such an organised challenger, the incumbent vested interests would have slowly regrouped and reconstituted a system pretty similar the one that preceded Katrina. By 2005, however, TFA had been working in Louisiana for 15 years and had helped to forge a national network of charter school operators, policy wonks, teachers and principals, with strong connections to deep-pocketed philanthropists, capable of seizing the opportunity to create something new. Crucially, as chapter 6 details, this network was also strong enough to withstand reprisals from the vestiges of the old regime, who made a concerted attempt to restore the *status quo ante* in the years that followed (Moe, 2019).

Another instance of TFA-led reform in the late 2000s could be found in Washington D.C. Michelle Rhee, the erstwhile director of the New Teacher Project shot to prominence when she became Chancellor in December 2007. Veteran *Washington Post* education reporter, Jay Mathews, wrote that Rhee's appointment was merely the latest development in what 'might be called the Teach for America insurgency' in US public education, noting that one in ten D.C. principals at the time was a TFA veteran, and that the KIPP network had been brought to D.C. by another alumna, Susan Schaeffler. TFA's 'influence has become hard to ignore' he observed (Mathews, 2007). Rhee was openly hostile to the teachers' union and ran the district 'as if the bureaucracy [she] administered [was] at least in part [her] enemy' (Mehta & Teles, 2012, p. 9). Early in her tenure she publicly declared 'I don't believe in collaboration, because it hasn't worked. I don't care about hurting the adults' feelings...This in an emergency. It is not a time to be polite' (Brill, 2011, p. 199).⁴⁷ For someone who never intended a career in education, Rhee has left a considerable mark. Frequently referred to in press reports as 'controversial,' a 'firebrand,' and 'America's most prominent education reformer' (Bruce, 2010; Buntin, 2014) Rhee relates in her (2014) autobiography that had it not been for an early '90s PBS documentary on Teach for America, she would never have signed up for the program, set foot in a classroom, nor devoted her energies to remaking the education system.

Rhee's signature achievement, and one that earned her plaudits from the Obama administration, was a new contract that established classroom results, not seniority, as the basis for teachers' pay (Strauss, 2016). In exchange for relinquishing tenure rights, DC teachers who performed satisfactorily or better earned significantly higher salaries, funded

⁴⁷ In December 2008 Michelle Rhee appeared on the cover of *Time Magazine* wielding a broom, a none too subtle metaphor for her intentions as Chancellor (Ripley, 2008). Rhee also fired a D.C. principal on national television as fodder for a PBS documentary on school reform (Morrow, 2013).

in part by donations from private foundations. Those rated unsatisfactory two years running faced dismissal (Turque, 2010a). Rhee used the new contract to fire 4% of the 4000-strong teacher workforce and put another 737 teachers on notice that they were underperforming (Turque, 2010b). The D.C. teacher evaluation model, known as IMPACT, has been widely cited as proof that external evaluation and performance pay *can* work if it is implemented with fidelity and rigorous oversight (Dee & Wyckoff, 2013). The results of IMPACT have offered succour to reform advocates who have been disappointed by efforts to introduce more robust evaluation elsewhere (Loewus, 2017).

Rhee also restructured the central bureaucracy, closed down under-enrolled district schools while overseeing a dramatic expansion in charter schooling,⁴⁸ and swelled the ranks of TFA corps working in the District (Mead et al., 2015). The rapid pace of change and Rhee's unapologetically abrasive style provoked a major backlash eventually resulting in her departure from the District in late 2010. But significantly for the fate of many of the reforms she instigated, Rhee was succeeded by another TFA alumna, Kaya Henderson. Henderson took a less belligerent approach, but nevertheless preserved much of Rhee's legacy, including IMPACT. Five of Henderson's 11 senior managers were TFA alums (Teach for America, 2016b).

In Rhee's wake, a similar story played out elsewhere in the country over the following years, albeit on a slightly less dramatic scale than in DC. In Tennessee, Newark, NJ, Colorado and beyond, TFA alumni emulated Rhee's record, introducing merit-based teacher compensation, beefing up the requirements for tenure, firing underperforming

⁴⁸ In 2007 charter school enrolled 27% of DC students. By 2011, 39% of DC students attended charters (National Alliance for Public Charter Schools, 2011).

principals and teachers, and expanding the number of charter schools. These episodes of reform are discussed in detail in Chapter 6. In any event, by the start of 2010, the fact that so many of America's most prominent and divisive reform leaders had come into the education system through the common pathway of Teach for America was no longer lost on the teachers' unions and other allies of traditional public education. Rick Hess, a Harvard professor of education and director of education policy at the American Enterprise Institute, contextualises TFA's growing influence in the following way:

If you understand that the size of the education sector – the people who think about this stuff every day – there's only a limited number. You know, between the foundations and governor's offices, and the head offices of the really big urban districts there's probably five thousand to fifteen thousand people whose day to day lives are in the world of education policy. And if TFA has five hundred alumni in there, and they have good relationships with another thousand, then they have a big influence (*Interview*, 2017b).

The Obama administration's highly contentious Race to the Top grant program which rolled out between 2009 and 2011, would further reveal just how extensively TFA agents had penetrated federal, state, and district administrations. By the time TFA celebrated its 20th anniversary at a summit in Washington D.C. in February 2011, a major backlash was underway. Chapter 6 charts this reprisal and its consequences for TFA and its legacy of reform.

In sum, by the mid-to-late 2000s various ventures, underwritten by TFA corps and alumni started to coalesce into a coherent 'jurisdictional challenge' to the traditional public system. In the absence of TFA, the charter school sector and alternative certification sectors would almost certainly be much smaller, and the most prominent entities in these spheres, such as The New Teacher Project and KIPP, simply would not exist. Perhaps similar entities might have emerged in TFA's absence, but given how heavily the 'no excuses' charter world relies on TFA for staff, it is hard to know where these networks would have found the workforce to sustain them. These ventures have growing and loyal

constituencies and have had a powerful demonstration effect. Well marketed by well-connected founders and leaders, they have had a discernible impact on senior policymakers' attitudes towards non-traditional models of schooling and teacher preparation.

By the end of TFA's second decade, a critical mass of alumni, many of whom had made their name as innovators or 'edu-preneurs', were taking up positions of power at the state and district level. Washington D.C. and New Orleans, in particular, are vastly different systems as a consequence of TFA alumni leadership. Changes in Tennessee, Colorado, Newark and elsewhere (canvassed in Chapter 6) have been slightly less dramatic, but significant nonetheless. In all, the American education system is less structurally coherent and control is much more contested as a result of Teach for America.

Conclusion

This chapter has endeavoured to test two empirical propositions. First, that the development of TFA accords with the model of subversion outlined in Chapter 3; and moreover, that Teach for America has made a distinct and consequential contribution to the education reform movement by making possible changes that would otherwise have faltered for want of amenable agents. With regards to the first proposition, I find that from the early 2000s onwards, TFA increasingly saw the classroom as merely the 'first arena of leadership' before alumni went on to 'make greater change within the system' (Mandel, *Interview*, 2017). Support from a 'new breed' of venture philanthropists saw TFA develop a much more deliberate and explicit focus on fostering 'reform leaders' throughout its second decade. TFA revised its recruitment practices to swell its ranks with individuals set on leading 'systemic change' rather than a life-long career in the classroom,

and new alumni programs, in particular, the Leadership for Educational Equity organisation, were added to bolster this newly articulated vision. Sensitive and proactive management of local stakeholders and a conducive federal policy climate enabled TFA to establish operations in raft of new regions throughout the 2000s, with minimal consternation from vested interests. In sum, TFA profited from the fact that its preferences for, and capacities to affect, systemic change were not well understood by incumbent groups until Teach for America had already become a large and influential organisation and its alumni were affecting shifts in structure and practice on a considerable scale.

I find that TFA alumni efforts to instigate change through innovation broadly conform to the notion of ‘layering’ expounded by historical institutionalists. Charter schools and alternative certification models gradually diffused throughout the system, slowly eroding support for traditional approaches, and building a coalition for more wholesale change. Likewise, alumni infiltration of decision-making hierarchies, with a view to converting old structures into new forms, was well and truly evident by 2009. Michelle Rhee in Washington D.C., Cami Anderson in Newark, Michael Johnston in Colorado, Kevin Huffman and Chris Barbic in Tennessee and John White and Sarah Usdin in Louisiana are some of the most prominent examples of this phenomenon. From around 2009, it was widely understood that Teach for America had forged an influential cadre of reformers and their impact was starting to antagonise incumbent interests. In short, TFA was about to become the victim of its own success and reach the limits of a *subversive* approach to change.

Through the use of counterfactuals I have demonstrated that existing explanations for recent changes in American education centring on philanthropic largesse, elite neoliberal ideation, and the weakening of incumbent interests groups are insufficient. As the example of the Annenberg challenge shows, philanthropic efforts to remake the American education system foundered when they failed to channel resources to agents that shared plutocrats' preferences for change. Likewise, top-down 'neoliberal' reformers needed the likes of Mike Feinberg and Dave Levin to found schools like KIPP to bolster arguments that choice and competition could offer something better than the old, uniform, model of district schooling. Correspondingly, Michelle Rhee's IMPACT evaluation scheme provided a much needed 'proof point' that holding teachers to account for student learning outcomes could, in fact, stimulate better performance system-wide. Finally, the tale of post-Katrina reconstruction in New Orleans shows that while the destruction of vested interests creates an opening for change, organised agents must step in to actually realise it.

6. Exposure and Reprisal: 2009 to Present

Teach for America was scaling the peak of its powers as it entered its third decade. Between 2009 and 2013 federal government stimulus spending in the wake of the financial crisis helped TFA to enter 20 new districts, while burgeoning application rates sustained a 50% increase in the total size of the corps (Baker, 2016). Simultaneously, it was increasingly apparent that TFA alumni were fulfilling the organisation's promise to create a cadre of leaders dedicated to 'challenging the status quo' in the American education system (Teach for America, 2019b). From DC to Denver, Newark to New Orleans, and many places in between, alumni were spearheading highly publicised and contentious programs to remake failing urban education systems using similar prescriptions – expanded charter schooling, tougher teacher evaluations, and aggressive efforts to recruit new teachers from non-traditional pathways, including, of course, Teach for America. Throughout this period, alumni reformers and others of their ilk, as well as the TFA organisation itself, received significant financial and rhetorical support from the Obama administration. Yet unprecedented growth and influence belied a looming crisis for TFA. As the extent of the organisation's power became increasingly manifest, a brutal reckoning with system incumbents ensued. For the first time in its existence TFA came under sustained attack. This chapter charts the 'exposure' of TFA as a significant disruptive force and details the resulting backlash from teachers' unions and other traditional custodians of the education system.

Understanding what happened after TFA was recognised as a vanguard of the reform movement is important – both substantively and theoretically. Charting TFA's recent fortunes not only completes the narrative arc of this thesis, but more critically, provides vital inferential leverage for the model of subversion advanced herein. The largely

effective recent reprisals show the power that system incumbents *could* have brought to bear on a younger and weaker TFA, had they anticipated earlier its long-run disruptive potential. Having belatedly recognised TFA's impact, teachers' unions and their allies have, in recent years, reversed TFA's geographic expansion, significantly compromised its recruitment, and unleashed – in the estimation of TFA's current CEO – 'a massive public affairs crisis' on the organisation (Villanueva Beard quoted in Mead, Chuong, & Goodson, 2015, p. 66). In other words, this chapter shows that it was not incumbent *weakness*, so much as their *failure of information and imagination* that permitted TFA to infiltrate and ultimately to *subvert* the American education system.

I find that three developments in particular stung the unions and their allies into action against TFA. First, the financial crisis compelled several states and districts to lay off teachers, yet throughout this period TFA continued to grow at record rates. For many rank and file unionists, this crystallised the notion that TFA's burgeoning scale and influence came at their expense. Second, the reform efforts of prominent TFA alumni in several venues attracted considerable attention in the national media. From these highly publicised episodes, union leaders and activists drew the lesson that TFA-spawned reformers would do the same elsewhere if given their druthers. Advocates of the traditional system determined that TFA had to be resisted and attacked. Third, TFA became strongly associated with the Obama administration's contentious agenda, in particular the Race to the Top (RTTT) program which granted federal money in exchange for state action on a range of reforms, including performance-based teacher evaluations and the removal of restrictions on charter school expansions. Teachers' unions and other advocates of traditional public schooling resented the extensive influence that TFA was perceived to wield within the administration and the direct

benefits it derived from federal government programs and decisions. By the end of Obama's first term, TFA stood as something of a totem for the perceived betrayal by President Obama and Secretary Duncan of the Democratic Party's long-time union allies.

In sum, Teach for America's once pristine public image grew increasingly complicated and remains so today. Critics of the organisation garnered hitherto unprecedented coverage in the national media, and sustained anti-TFA campaigns on college campuses depleted recruitment. Under pressure from teachers unions and other public education activists, TFA has, in recent years, been ejected from several major school districts and has not opened a new region since 2015. Having surveyed these developments, this chapter then considers how TFA has responded to these contemporary challenges and ruminates on the organisation's enduring policy legacy and likely future role, now that the potential of a subversive change-making strategy has been exhausted.

Today, TFA can lay claim to a significant legacy of change. Both the charter and alternative certification sectors are unquestionably larger and more dynamic for TFA's influence. Indeed, TFA has been an indispensable force in the construction of a parallel system of public education – a system comprised of hard-charging 'no excuses' charter school networks, substantively staffed by the graduates of TFA and other similar programs for recruiting and preparing teachers. This parallel model is growing and in some cities it comprises a significant, even preponderant, portion of the entire K-12 offering. On a national scale, however, it continues to be dwarfed by traditional district-run unionised schools. While TFA alumni have spearhead wholesale overhauls of several major districts – such as New Orleans and Washington DC – overall, reformer in-roads to the traditional public system have been limited and now face stiff headwinds. Just as TFA has been the

subject of targeted reprisals, the reform movement at large has, in recent times, faced significant backlash from resurgent teachers' unions. The contemporary K-12 landscape is Balkanised, as reformers struggle to retain the ground gained up to and during the Obama years, and unions fight to repeal policy changes and shrink the market share of charters and alternative certification providers.

In sum, this chapter adduces convincing evidence that much of TFA's success in propagating educational innovations and reforms derived from its *subversive* quality. TFA's initial outward appearance as a pragmatic teacher labour solution belied the organisation's ultimate impact. TFA brought not just teachers – but a critical mass of densely networked change-agents – into the heart of the K-12 system and empowered and encouraged them to accrete and use their discretionary bureaucratic power to depart from the status quo. Once TFA was widely identified as a major source of unwanted changes by system incumbents, however, the organisation has struggled to maintain momentum. The present fate of TFA shows that the teachers unions and the 'education establishment' still retain a lot of power – enough, certainly to repel serious threats to their interests *once they are recognised as such*.

They took our Jobs!: TFA continues to grow despite widespread layoffs

The financial crash of late 2008 plunged many states and school districts into serious debt, compelling teacher layoffs and hiring freezes. Yet despite the straitened times, TFA grew at a record rate in the immediate post-crisis period. The contraction of the teacher job market changed the way that unions regarded and interacted with Teach for America. In the absence of genuine teacher shortages, incumbent groups came to view TFA's

continued expansion in places like Chicago and Seattle as a zero sum proposition. Unions' historical forbearance of TFA fractured and resentment over jobs soon coalesced with growing consternation about the organisation's role in advancing 'neoliberal' reforms.

TFA had operated relatively peaceably in Chicago since 2000 and had grown significantly under Arne Duncan's stewardship of Chicago Public Schools (CPS) from 2001 to 2009, despite the city's powerful teachers' union. But the tight post-crisis job market saw the Chicago Teachers' Union (CTU) shift from a position of reluctant toleration to one of outright hostility. In March 2010 CPS signed a contract to add another 200 TFA teachers to its existing corps of 155, despite the fact that CPS had laid off thousands of tenured teachers in the years prior (Huffington Post, 2010; Shibata, 2013). Unsurprisingly, the decision enraged the then head of the CTU, Karen Lewis, who felt that any vacancies ought to have been filled with teachers that had been laid off in the crisis. 'Obviously we're not under-served or understaffed or under-resourced in terms of teachers, and I thought that was the whole purpose behind TFA – to provide teachers in areas that are under-resourced' observed Lewis (quoted in Clauss, 2010).

The CTU's antipathy towards TFA soon broadened from concerns about jobs to denunciations of TFA's effects on the education system at large. In December 2012 Lewis condemned TFA as 'a group of education missionaries' that had spawned the likes of Michelle Rhee 'who, with her lies about her own classroom experience has catapulted herself into the welcoming arms of those who hate unions, tenure and anything else that provides due process and gives teachers real voice' (cited in Ravitch, 2012). With the express intention of eroding CPS' reliance on TFA, the CTU has since helped to develop

and support a number of ‘home grown’ alternative certification programs – a step that some observers believe the unions should have taken much earlier. ‘If the unions had been smart’ says education historian, Jack Schneider:

what they would have done would have been to say something like “ok, we’re going to come up with our own [alternative certification] program and we will make sure that every classroom is staffed with a full time teacher.” That was a failure on their part. They didn’t really recognise the threat that TFA posed long-term as a catalyst of all sorts of broader reforms. By the time they worked it out, TFA was already entrenched in nearly all the big districts and was a favourite workforce solution for a lot of superintendents. (*Interview*, 2017)

Schneider’s prescription appears to have been somewhat effective in Chicago, albeit belatedly. By 2016, CPS had cut back its TFA contract in favour of union-backed programs focussed on training community members and parents to work in their local schools (Sanchez, 2016). Today, TFA’s total footprint in Chicago is less than half of what it was at its peak of 593 during 2013-14 school year (Teach for America, 2019h) and a much greater proportion (53%) of its corps work in charter rather than district schools (Sanchez, 2016). In short, once it recognised TFA as a threat to its core interests, the CTU has deployed its resources to attack and diminish TFA’s influence in Chicago’s district schools.

A similar story played out in Seattle, where in 2010-11 TFA successfully lobbied the city’s school board to enter an already saturated teacher job market, and in so doing, stirred up a nasty clash with the local union and its acolytes (Hootnick, 2014). Whereas in earlier years, TFA had generally entered new regions by filling bona fide shortages, the expansion into Seattle was never justified in such terms. Rather, the comparative cheapness of TFA recruits vis-à-vis teachers with experience or advanced degrees was the compelling factor for key decision makers in the district. As Michael DeBell, a school board member whose support helped to secure the contract for TFA in 2010 recounted,

‘it wasn’t a question of lacking qualified teachers. It was a simple matter of fiscal challenges and political optics – about not paying extra’ (quoted in Hootnick, 2014). For its part, TFA cited wide achievement gaps along race and class lines as the major motivation for opening a site in Seattle (Scroggins, Interview, 2017).

The school board’s decision to partner with TFA infuriated the local teachers’ union and many in the broader community who turned up in record numbers at public meetings to testify against TFA (Hootnick, 2014; Pailthorp, 2010). TFA’s then co-CEO, Matt Kramer, recalls an ‘extremely ugly’ period:

We just got our clock cleaned...We never would have gone to Seattle had we known what it was going to be like...There was a group of bloggers who had banded together [to attack] Teach for America. And they went after the superintendent and they got the superintendent thrown out and Teach for America was the major reason for that. They also went after school leaders who agreed to hire Teach for America people...it was unbelievable. (Kramer, Interview, 2017)

As in Chicago, the Seattle teachers’ union continued to pressure the school board to end its relationship with TFA every time the contract came up for renewal. In March 2012, a motion before the board to terminate TFA’s contract was defeated by a single vote (Rosenthal, 2012). But this was a pyrrhic victory. Union pressure has since seen TFA ‘all but run out of town’ (Halvorson, 2017). By the 2016-17 school year – the most recent year for which data is available – TFA placed but a sole teacher in Seattle Public Schools (Teach for America, 2017). Currently, TFA’s small Washington state operations are focussed in Seattle’s outer-lying suburbs and rural areas in the south of the state where local communities have been more receptive to the organisation (Halvorson, 2017; Teach for America, 2019e).

Union dismay at TFA novices taking up positions in the absence of genuine shortages was also reported in Bridgeport, Connecticut (Strauss, 2013b); Charlotte-Mecklenburg, North Carolina (Toppo, 2009); and Newark, New Jersey (R. M. Cohen, 2015). Throughout this period, Teach for America persistently contested the notion that its corps members ought only to make up shortages, even though this had been a prominent rationale for the organisation at its founding.⁴⁹ TFA also disputed claims that it was unfairly displacing traditionally qualified teachers, contending that corps members competed on an equal footing for open positions (Biber, Interview, 2017; Hootnick, 2014). A systematic analysis of TFA contracts contradicts this assertion, however. Using freedom of information requests, Brewer *et al* obtained and examined TFA's 'memorandums of understanding' with school districts in Atlanta, Chicago, New Orleans, New York City, and Eastern North Carolina between 2000 and 2016. They found that district administrators were obliged to 'reserve and protect positions exclusively for corps members'; that jobs held by corps members 'were not a result of equal and open competition'; and that corps member placement was 'not limited to so-called shortage areas' (2016, p. 2). The authors speculate that many districts were prepared to brook union disquiet about TFA hires during the downturn because TFA teachers represented a compelling long-term cost saving. Compared with conventionally trained teachers, TFA corps members were less likely to stay in district classrooms long enough to earn top salaries or access retirement benefits (Brewer et al., 2016). Others speculate that TFA's 'preferential treatment' was fuelled in part by 'sweetheart' deals with districts presided over by TFA alumni. For instance, in

⁴⁹ On the opening page of Kopp's senior year thesis – the most comprehensive early enunciation of Teach for America's structure and objectives – she stated the following: [The Teacher Corps – as it was then known] 'seeks only to address the teacher shortage, and its members would serve only as supplements to the normal faculty in schools experiencing shortages of certified qualified teachers.' (Kopp, 1989, p. 1)

New Orleans; Camden and Newark, New Jersey; and Washington D.C., alumni superintendents oversaw dramatic expansions in the TFA corps (R. M. Cohen, 2015).

In any case, TFA's determination to expand during the downturn brought it into conflict with 'bread and butter' union concerns more directly than ever before. Historically, unions had generally grudgingly tolerated TFA because TFA largely, if not exclusively, had restricted its operations to areas of stark and obvious need (Hootnick, 2014; Schneider, *Interview*, 2017). Once there was widespread evidence that TFA was expanding into saturated job markets, the gloves came off. In an attempt to defuse the criticism, TFA underscored its bona fides as 'a leadership development organisation, not a teaching organisation' (Kopp, 2011 quoted in Hootnick, 2014). But doubling down on its public positioning as a 'pipeline of education system leaders' only created a different headache, as unions and others became increasingly cognisant and resentful of the reform efforts that TFA alumni were fomenting. As the reform movement made considerable advances across the country from around 2009 onwards, TFA was increasingly denounced not just as a source of 'scab labour' but also as a leading proponent of a nefarious 'corporate reform agenda' (Ravitch, 2014, p. 139, *Interview*, 2017). This latter criticism continues to complicate TFA's relationships with districts even as the economy has recovered and the market for teachers has expanded.

TFA Reformers Reap Reprisals

As Michelle Rhee was reaching the end of her polarising three-year stint as Schools Chancellor of Washington D.C., a constellation of other high-profile TFA alumni were prosecuting similar reforms across the country. A dense network of TFA corps and alumni in New Orleans continued to embed the profound structural changes begun in

the wake of Katrina, while others led major overhauls of education policies and practices in Newark, Colorado, and Tennessee. As local unions and their activist allies attempted, with mixed success, to thwart these efforts, the Teach for America organisation became indelibly associated with the perceived excesses of its most ardent alumni reformers and would suffer reprisals as a result.

The first and most notable casualty of the union-led backlash was Rhee herself, whose legacy of school closures, mass firings, and major revisions to teacher evaluation and compensation proved difficult for her boss, Mayor Adrian Fenty, to navigate electorally. In September 2010, Fenty, who had hand-picked Rhee as Chancellor and resolutely supported her reforms, lost his Democratic party primary. Rhee resigned shortly thereafter. A *Washington Post* poll in August that year had found Rhee to be a highly salient and polarising figure among registered Democrats. Among white voters, 68 percent felt Rhee was a reason to support Fenty, whereas 54 percent of African American voters cited Rhee's legacy and abrasive style as a reason to vote against the mayor (Turque, 2010c). This racial gap in support likely proved decisive.⁵⁰ Fenty attributed his loss to the divisiveness of his school reforms, but said if he had his time again, he would not have acted differently (Osborne, 2017; Whitmire, 2011).

Rhee, too, was uncowed by the defeat. If anything, she became even more of a firebrand (Mead et al., 2015, p. 57). In late 2010, she founded Students First, a national reform advocacy organisation. Within months, she was advising the Republican governors of New Jersey, Nevada, and Florida on teacher tenure abolition (Gabriel & Dillon, 2011).

⁵⁰ Fenty lost the Democratic primary by 10 percentage points. He won 53 of 58 majority-white census tracts and lost 108 of 118 majority-black census tracts (Whitmire, 2011).

As ‘Teach for America’s most famous alum,’ Rhee’s ‘polarizing stature’ complicated the organisation’s public reputation and stakeholder relationships (Mead et al., 2015, p. 57). For instance, when the local union conspired to significantly delay and frustrate TFA’s establishment in Minneapolis-St Paul throughout 2009 and 2010, Rhee’s legacy was cited as the main motivation. Matt Kramer, who oversaw TFA’s operations in the twin cities, recalls a definitive conversation with the then head of the Minnesota Teachers Union:

He told me ‘the reason why we don’t want you here has nothing to do with whether your teachers are good or not good...the reason why Teach for America will never be welcome here is I’ve seen what Michelle Rhee did in DC and I want to be clear that the next Michelle Rhee will never be welcome in Minneapolis.’(*Interview*, 2017)⁵¹.

In short, TFA was beginning to learn that it could not simultaneously celebrate Rhee as an exemplary alumna and remain above the political fray. Nevertheless, in February 2011, Rhee was a headline act at Teach for America’s 20th anniversary summit, alongside other ‘patron saints’ of the reform network, such as New York City schools chancellor Joel Klein (Brill, 2010; Heitin, 2011). Three months later, Rhee would stump for expanded school choice alongside the Republican Governor of Wisconsin and scourge of the union movement, Scott Walker (Gabriel & Dillon, 2011). Rhee ‘made it easy for the teachers’ unions to label [TFA] as anti-teacher,’ reflects founding TFA staffer and prominent reform advocate Whitney Tilson. ‘Getting into bed with Scott Walker who was trying to do extreme union busting lost us a lot of support’ (*Interview*, 2017).

Given Rhee’s unpopularity, many expected the incoming D.C Mayor, Vincent Gray, to wind back her reforms. The American Federation of Teachers had supported Gray to the tune of around \$1 million – an unprecedented amount for local DC elections (B. Smith,

⁵¹ These comments were independently recalled by Daniel Sellers, TFA’s then executive director for Minneapolis (Sellers, *Interview*, 2017).

2010). But Gray surprised and disappointed his union backers by appointing Rhee's deputy, fellow TFA alum, and close friend, Kaya Henderson, as her successor (Osborne, 2017). Henderson adopted a markedly less belligerent style, but her team, which included a legion of TFA alumni in senior roles, largely continued Rhee's substantive agenda (P. Stein & Brown, 2016). Indeed, the president of the D.C. Teachers' Union would opine in 2016 that '[Rhee] is still here but in the form of Kaya Henderson' (Vail, 2016). Unlike its Chicago counterpart, the DC teachers union has been less effective in beating back TFA's presence and influence in the District. Today, the 'IMPACT' model of teacher evaluation pioneered by Rhee remains a cornerstone of the D.C. system, charter schools enrol 48% of all students, and the school day and year has been extended in schools serving poor minority students. Fewer middle class families leave the District for the surrounding suburbs once their children reach school age (P. Stein & Brown, 2016).

Reformers were able to hold the line against union opposition in D.C. for a few reasons. First, though Rhee's abrasive style had riled many, Gray and his successor, Muriel Bowser, recognised the high public salience of education issues. Many voters desperately wanted better schools and saw evidence that the reforms were working. Under Henderson, D.C.'s graduation rates and test scores rose rapidly (Moe, 2017; Osborne, 2017). Second, as charter schooling expanded to enrol nearly half of all students by 2016, the D.C. teachers union lost membership and money, and consequently political influence – outside New Orleans it is, 'the weakest urban teachers union in the country' (Moe, 2017, p. 7). Third and relatedly, school governance in Washington D.C. was (and remains) a mayoral prerogative, rather than the preserve of an elected school board. Because mayors tend to be elected by larger and more diverse constituencies, and are subject to greater media scrutiny, they tend to be less vulnerable than school boards to capture by employee

interest groups (Reckhow, 2013; Viteritti, 2009; Wong & Shen, 2007). Appeasing the D.C. teachers union risked alienating a broader constituency that had become vested in many of the changes first instigated under Rhee and consolidated and expanded by Henderson. D.C.'s burgeoning charter school sector, for instance, had dramatically expanded schooling choices for poor and minority communities, as well enticing some middle class families back to the system (Osborne, 2017).

Just as Rhee was being run out of D.C., reformers in New Orleans were also contending with a rising backlash. As detailed in Chapter 5, a coalition of reformers, spearheaded by TFA alumni and allied organisations, had revolutionized the school system in the wake of Hurricane Katrina. By 2010, more than 70% of New Orleans students were enrolled in charter schools, overseen by the state-run Recovery School District (RSD). The remainder attended a handful of schools retained and directly run by the Orleans Parish School Board (OPSB). While chartering much of the district had sped up the rebuilding process and improved educational outcomes, it also engendered a welter of resentment from the local community.

Before Katrina, the Orleans Parish School Board had provided thousands of unionised middle class jobs for the city's black residents.⁵² But the charter management organisations that ran the new system declined to rehire most of the old workforce and eschewed collective bargaining. Instead, they engaged the likes of Teach for America and The New Teacher Project to meet their recruiting needs. Young, white teachers, from

⁵² Three quarters of the 7,500 Orleans Parish School Board employees laid off in the aftermath of Katrina were African American. Reliable data is hard to come by, but the best estimates suggests that less than a third of these employees were later hired back by the Recovery School District, charters, or the reconstituted Orleans Parish School Board (Osborne, 2015).

all over the United States flooded into the city. ‘Teach for America was the biggest slap in the face,’ said Caroline Roemer Shirley, who runs the Louisiana Association of Public Charter Schools. ‘I don’t have a job here, and you gave it to a twenty-two-year-old that’s never been in the classroom? There’s a lot of hostility about that.’ (Osborne 2015).

The Recovery School District that presided over much of the recast system was only ever supposed to be an interim measure, and by 2010, there was a growing clamour for the school system to be returned to local control. The ‘vested interests were bound and determined to get their system back,’ contends Moe, and a lot of black residents had grown tired of whites and ‘carpetbaggers’ telling them how to run their school system (2019, p. 104). But reformers were loath to see the system they had built revert to pre-Katrina standards of oversight and performance. The 2011 elections for the Louisiana Board of Elementary and Secondary Education (BESE) were a watershed moment, because BESE would be responsible for determining if, when, and how, New Orleans schools would once again be governed by the OSPB. Having built a new system, reformers now had to forge a political coalition to protect it.

The then head of the Louisiana Association of Educators viewed the 2011 BESE elections as nothing short of ‘a battle to save public education.’ ‘They’ve changed the face of New Orleans into the face of Teach for America’ she contended (Wieder, 2012). Opponents of the reforms feared that New Orleans was just the beginning of a state-wide push. Ahead of the BESE poll, a Coalition for Louisiana Public Education was formed, comprised of NEA and AFT affiliates, the Louisiana School Boards Association, the Louisiana Association of School Superintendents, and the Louisiana Association of

School Executives. In other words ‘the entire educational establishment was coming together as one to reconstruct the status quo’ (Moe, 2019, pp. 110–111).

Against this coalition, the reformers amassed a vast war chest. Contributions from in-state and national reform groups, the Louisiana business lobby, and Republican party donors totalled \$3 million, outspending the ‘establishment’ coalition’s \$225,000 by nearly thirteen to one. The reformers won in a landslide, securing seven of the eight contested positions on the 11-member board. By far the most fiercely fought board race involved Kira Orange Jones, a TFA alumna and the organisation’s executive director for the Greater New Orleans Region. Orange Jones raised \$475,000 from a vast national reform network that included donors from more than two dozen states (Moe, 2019). Her union-backed opponent mustered a mere \$22,000. Orange Jones’ victory ensured the BESE supermajority required to guarantee the appointment of Governor Bobby Jindal’s choice for State Superintendent of Education, John White, himself a TFA alumnus.

The following year, reformers once again had to rebuff electoral threats to their legacy. At some point the state-run Recovery School District would have to turn over control of the New Orleans charter system to the local board. Hence the 2012 elections to determine the composition of the Orleans Parish School Board mattered very much to both reformers and ‘the establishment.’ Racial resentment at the loss of local control was again very salient, but the remnants of local teachers’ union proved no match for the cashed up reform coalition. Again, a TFA alumna and leading light in the reform movement won a critical electoral victory. As head of New School for New Orleans, Sarah Usdin had been instrumental in constructing the new charter system by attracting national organisations such as KIPP and The New Teacher Project to the city. Her

victory helped to ensure that the OPSB was ‘no longer a bastion of anti-charter sentiment’ (Moe, 2019, p. 117).

Reformers again retained control of the BESE at the 2015 state elections, but the result of the gubernatorial race that year hastened the return of New Orleans schools to local control. Democrat John Bel Edwards succeeded Bobby Jindal as governor having run on a commitment to turn over the governance of New Orleans schools to the OPSB as soon as possible. Recognising the threat to charter school independence, the reform coalition, led by John White, again mobilised to pre-emptively draft a bill they could abide, rather than have unacceptable terms forced upon them. The resulting bill – Act 91 – that passed the Louisiana state legislature in May 2016 returned control of all the RSD’s 52 charters to the OPSB by July 2018, but guaranteed charter schools ‘operational autonomy’ over:

programming, instruction, curriculum, materials and tests, yearly school calendars and daily schedules, hiring and firing of personnel, employee performance management and evaluation, terms and conditions of employment, teacher or administrator certification, salaries and benefits, retirement, collective bargaining, budgeting, purchasing, procurement, and contracting for services other than capital repairs and facilities construction. (Act 91, 2016, p. 91)

In other words, the OPSB would not regain direct management of the schools, but would be responsible for monitoring their performance and, in concert with the superintendent, shuttering those that failed to deliver the requisite quality of education. Some of New Orleans’ civic leaders greeted Act 91 as a satisfactory resolution to state intervention, but many in the ‘education establishment’ regarded it as a stitch up by the charter industry, leaving ‘virtually all authority in the hands of individual charter operators and their unelected, self-appointed boards’ (Dequine Harden, 2016)

The chartering of the New Orleans school system has certainly provided an ‘in built’ mechanism of preservation for the reforms. As in Washington D.C., charters have created their own vested interests – most notably the families that patronise them and the organisations such as TFA, The New Teacher Project and CMOs such as KIPP – that are heavily invested in the new system and have strong incentives to safeguard what they had helped to create (Moe, 2019). Because these organisations were embedded in a dense national network of reformers, they have been able to draw on the resources of deep-pocketed philanthropists to outgun their already weakened electoral opponents. In sum, New Orleans is a dramatically different school system today, not simply because Katrina swept away the old vested interests, but because there was an existing, densely connected network of reform groups poised to fill the resulting vacuum. Moreover, this reform network has been strong enough to withstand the concerted efforts of the Louisiana teachers unions and erstwhile members of the OSPB to regain control of the system and restore the status quo ante. Senior state officials wanted to capitalise on the crisis to overhaul the system, but without the agents and organisations equipped to stand up a charter system in short order and build a robust political coalition to defend it they could not have achieved their aims. Absent TFA, the likes of Sarah Usdin and New Schools for New Orleans, the New Teacher Project, KIPP and a host of other charter networks, and state officials would have not have had the capacity to stop the vested interests from eventually regrouping and reclaiming control.

Elsewhere, in Newark, New Jersey, a similar reform playbook was being run by another TFA alum. Newark Schools had been placed under state control in 1994, but this change

had done little to improve the parlous state of the city's education system⁵³. In 2010, the Republican Governor Chris Christie and the Democrat Mayor Cory Booker forged a bipartisan partnership to do something about the parlous state of Newark's schools. Booker had been a darling of education reform movement for some time, having cultivated an image as a Democratic 'pariah' for 'taking on the Party orthodoxy.'⁵⁴ As a self-styled 'African-American urban Democrat telling the truth about education,' Booker was catnip to the hedge funders, venture philanthropists, and Silicon Valley entrepreneurs who wanted to invest their millions in overhauling public education (Booker, quoted in Russakoff, 2014). On 24 September 2010, Facebook founder Mark Zuckerberg, graced the Oprah Winfrey Show with Booker and Christie to announce a \$100 million dollar donation to turn Newark 'into a symbol of educational excellence for the whole nation' (Winfrey, 2010).

Christie chose TFA alumna Cami Anderson, a veteran of Joel Klein's New York City Schools administration and long-time friend of Booker's, to be the state-appointed superintendent of Newark Schools. Between 2011 and 2015, Anderson eliminated neighbourhood school catchments in favour of a city-wide lottery, introduced merit-based teacher compensation, fired many principals and teachers, and dramatically increased the number of charter schools (Strauss, 2015). Nearly a quarter of district schools were deemed to be under-utilised or underperforming and so were shut down or turned over to charter management organisations. Anderson also oversaw a dramatic increase in the number of TFA corps members working in Newark schools (Russakoff, 2016).

⁵³ In 2010, the head of the Newark Trust for Education described the Newark school system as 'like a candy store that's a front for a gambling operation. When a threat materialises, everyone takes his position and sells candy. When it recedes they go back to gambling' (Russakoff, 2014).

⁵⁴ In 2000, Booker told the conservative think-tank the Manhattan Institute, that 'if you look at the entire school system in Newark, you have to find it repugnant.' In this same speech he declared his support for charter schools and vouchers (Booker, 2000).

While graduation rates increased significantly and school suspensions declined during Anderson's tenure, reforms engendered major public anger. As in New Orleans, black residents resented the resulting job losses and felt that outsiders had descended on their community and unleashed radical changes without adequate community consultation. Author Dale Russakoff – who followed the reforms from their conception and had extraordinary access to the chief protagonists – recorded that much of Zuckerberg's money and the matching donations ended up with external consulting firms. Many of these consultants had ties to Joel Klein, Teach for America, and other programs 'in the tight-knit reform movement'⁵⁵. One community leader expressed the frustration of many local residents, telling Russakoff 'everybody's getting paid, but Raheem still can't read' (Russakoff, 2014).

As the community resentment against the restructuring mounted, Booker exited the increasingly fractious scene in late 2013, leaving the mayor's office for the U.S. Senate. The ensuing mayoral election in May 2014 was a battle between reformers and unions for control of public education. City councillor and former high school principal, Ras Baraka, backed by local and national education unions to the tune of just over \$600,000 pledged to take back local control of the schools (Goldstein, 2014a). His opponent, Shavar Jeffries, who supported the reforms, but not the 'colonial' way in which they had been implemented, raised almost \$5 million from the national reform movement (quoted in

⁵⁵ Russakoff's monograph 2016 on the Newark reforms reports that of the \$200 million donated (\$100 million from Zuckerberg and another \$100 in matched donations from other philanthropic sources) \$21 million was spent on consultants for: 'communications, data systems, strategic planning, financial analysis, human resources management, reorganization of district offices, teacher and principal evaluation frameworks, advice on teachers' contract negotiations, design of universal enrollment system, and analysis of student performance data. Teach for America received \$1 million to train teachers for positions in Newark's district and charter schools (2016, p. 230).

Russakoff, 2016, p. 207). Unlike New Orleans, national resources did not prevail electorally. Baraka won resoundingly. During the campaign, and once in office, he repeatedly called on Christie to terminate Anderson's appointment. She eventually resigned in June 2015 (Strauss, 2015). Randi Weingarten, the president of the American Federation of Teachers, hailed the news as 'an opportunity to undo the many mistakes made under [Anderson's] leadership' (quoted in Zernike, 2015).

Yet despite the departure of Anderson, her reforms remain largely intact today. While there has been more emphasis on recruiting local community members to teach in district schools in lieu of transplants brought in under the auspices of programs like Teach for America and the New Teacher Project, charter operators such as KIPP have continued to grow apace and draw heavily on these alternative certification pathways (Wall, 2018). While Baraka repeatedly called for a halt to charter school growth in Newark, he was powerless to stop it. In New Jersey, state level authorities authorise charter expansions and Chris Christie was an avid charter school proponent. Moreover, the charter schools created their own vested interests, making it electorally difficult for opponents to reverse their proliferation (Greene, 2015). Despite concern that charter growth could 'suck the life out of traditional schools,' Baraka understood that once established, charters are 'a fact of life.' 'We can't burn the [charter] schools down – people's kids are in there...so we have to play in the sandbox together.' As the Newark Teachers Union President observed in 2016, 'the Mayor's not stupid. Charter school people vote.' (Wall, 2018).

Today, Newark outperforms the majority of comparable New Jersey districts in reading and mathematics, and Newark's charter schools, which educate a third of all students, are among the top-ranked urban charter schools in the United States. The share of black

Newark students in high-performing schools increased four-fold between 2006 and 2018 (Margolis & Groves, 2019). But in early 2018 the tide appeared to turn in favour of charter school opponents and advocates of traditional district schooling. Christie left the Governor's office in January to be replaced by Democrat Phil Murphy who proposed a 'time out' for charters in Newark. In February, control over Newark schools was returned to an elected school board, albeit with a two-year probationary period during which the state continues to exert some governing influence. The current board contains some outspoken charter school sceptics and teachers' union allies (Wall, 2018). While the return of local control has been widely welcomed, even by many reformers, there is apprehension that 'special interests' might again exert undue influence over hiring and contracts now that an elected local board is back in charge (Brody, 2018).

As rapid changes unfolded in D.C., New Orleans, and Newark, the fact that so many of America's most prominent and divisive reform leaders had come into the education system through the common pathway of Teach for America became something of a progressive talking point. A feature in *Prospect Magazine* in October 2012 sounded a dire warning about TFA's decades-long push to channel alumni into positions of education system leadership and policy influence:

TFA is coordinating a political revolution...A selective crowd of high-achieving college graduates is primed to take over the leadership of America's schools...It isn't hard to imagine the massive proliferation of Michelle Rhee's and, in turn, the entrenchment of education reform geared toward money-soaked charter expansion...and test based student achievement. In other words, what began – and is still viewed by many as an apolitical service corps could be the Trojan horse of the privatisation of public education'(Cersonsky, 2012)

Similar pieces appeared in *Jacobin* (Hartman, 2011; Shibata, 2013), *The Nation* (Cunningham-Cook, 2012), *Salon* (Cersonsky, 2013c), and various education sector trade magazines (Lahann & Reagan, 2011; Schneider & Heilig, 2014; Shiller, 2012).

Simultaneously, centrists and conservatives were making similar observations about TFA's outsized influence on the education system, albeit from a laudatory rather than alarmist perspective (Brill, 2010, 2011; Brooks, 2010; Mathews, 2007; Moe, 2011). These pieces – over-egged though some of them were – helped to crystallise a long-harboured scepticism of TFA on the progressive left into outright enmity. Across the country, union leaders and public education activists read the coverage of reforms in D.C., New Orleans, and Newark and concluded that similar things might be in store for them unless this vector of so much disruption was taken on more assiduously. But the unions would get little assistance in this end from their erstwhile Democratic Party allies in the federal government.

TFA Gets Entangled in Contentious Federal Agenda

Though the Democratic party and the teachers' unions had been drifting apart on education policy since at least Bill Clinton's presidency (Peterson et al., 2014; Wolbrecht & Hartney, 2014), there was initial optimism among the leadership of the NEA and AFT that the Obama era would herald a period of comity and cooperation at the federal level, after the divisiveness of No Child Left Behind. They were soon disappointed. Tensions flared before Obama had even taken office over his choice of Education Secretary. In the lead up to the 2008 election an intra-party schism had emerged between labourite Democrats who supported the teachers unions' agenda and the more centrist, 'thoroughly modern do-gooders'⁵⁶ of the reform movement (Brooks, 2008; Goldstein, 2009). At the

⁵⁶ In a March 2008 *New York Times* op-ed, David Brooks introduced the notion of 'thoroughly modern do-gooders':

The people who fit into this category tend to have plenty of résumé bling...[they] typically went to some fancy school and then did a stint with Teach for America or AmeriCorps before graduate school. Then, they worked for a software firm before deciding to use what they'd learned in business to help the less fortunate...These thoroughly modern do-gooders dress like venture capitalists. They talk like them. They even think like them...They are not interested in working for big sluggish bureaucracies...They will tell you even before you have a chance to ask that they are data-driven and accountability-oriented. They're always

2008 Democratic National Convention, Adrian Fenty, Cory Booker, Joel Klein, and Al Sharpton had addressed a well-attended panel on education policy and ‘openly denigrated the teachers unions who accounted for 10 percent of national conference delegates’ (Goldstein, 2009).

Obama, too, had made supportive noises about school choice and merit pay as a Illinois and US Senator. In part because of this, the AFT and NEA had endorsed Hilary Clinton during the Democratic primaries (Layton, 2015a). But Obama had also chosen Stanford education academic Linda Darling-Hammond to serve as his education advisor during the general election campaign and the transition to office. Hammond had strong support from the teachers unions and was well known in education circles for her opposition to merit pay and her vocal disdain for Teach for America. Consequently it was not obvious on which side of the intra-party ‘education wars’ Obama would position his administration (Barone, *Interview*, 2017; Brill, 2011). In naming the pro-charter, pro-TFA CEO of Chicago Public Schools, Arne Duncan, as Education Secretary, Obama made his views clear. The passing over of Darling-Hammond shocked the ‘education establishment’ recalls veteran *Washington Post* education reporter Valerie Strauss. ‘People were convinced she was going to be Secretary of Education – as was she’ (*Interview*, 2017).

Much of the blame for Darling-Hammond’s scuttling was ascribed to Democrats for Education Reform (DFER), a political action committee co-founded in 2005 by Witney Tilson (a founding TFA staffer and high profile champion of KIPP schools) that had

showing you multivariate regressions or explaining why some promising idea “didn’t pencil out.” The highest status symbol in their circle is a RAND study showing that their program yields statistically significant results.

Education reporters subsequently seized on the term as a fit description of the education reform wing of the Democratic party and TFA types in particular (E. Green, 2008a).

strong connections to the Obama team and had made early donations to his presidential campaign. In November 2008, a DFER memo to the President-elect was leaked. It criticised Darling-Hammond for her close ties to the unions and animosity towards TFA, and urged the appointment of Duncan, having also mooted Wendy Kopp as a highly suitable candidate (E. Green, 2008b). Leaving nothing to chance, DFER then unleashed a ‘highly coordinated media campaign’ against Darling-Hammond. In a single week in December 2008, the *Wall Street Journal*, *New York Times*, *Washington Post*, and *Boston Globe* all editorialised or published op-eds based on DFER’s talking points (Goldstein, 2009). Less than two weeks later, Obama announced Duncan, DFER’s first choice, as Education Secretary.

While Kopp did not end up in the top job despite DFER’s boosting, Teach for America’s influence within the Obama administration was nevertheless pronounced. TFA alumni and allies were ‘everywhere’ in key education posts during the Obama administration (Barone, *Interview*, 2017; Brisbane, *Interview*, 2017): ‘two senior assistants to Arne Duncan, as well as education policy advisors and associates to [Senator Majority Leader] Harry Reid, and [Senator] Al Franken, and Representative George Miller [Chair of the House Education Committee]’ (Hootnick, 2014). Over seven percent of all Obama-era political appointees to the Department of Education were TFA alumni. Of all appointees with classroom teaching experience, over 40% were TFA affiliated.⁵⁷ This level of influence is out of all proportion when one considers that TFA – corps and alumni combined – makes

⁵⁷ These statistics were calculated by the author using a comprehensive list of all Obama-era political appointees between January 2009 and January 2017. This list was compiled using information from archived pages of the Department of Education website, accessed via <https://www2.ed.gov/news/staff/update.html>. I then established a work history for each listed individual using official Department of Education biographies, LinkedIn, or other verified sources. Of the 362 political appointees to the Obama-era Department of Education, 66 listed K-12 classroom teaching experience in a public biography or resumé. 27 of these were TFA alumni.

up but a tiny fraction of the total teacher workforce in America.⁵⁸ At a TFA D.C. Region gala in 2012, Duncan joked about the ubiquity of TFA alumni in his midst: ‘I keep trying to escape you, I can’t seem to do it’ (quoted in Wieder, 2012).

Nowhere was TFA’s influence on the federal agenda more apparent than in the roll out of Duncan’s signature program, Race to the Top (RTTT). Using funds from the American Recovery and Reinvestment Act of 2009, Race to the Top aimed to create an opportunity out of the financial crisis that had plunged many school districts and states into fiscal precarity. Whereas earlier federal interventions into school education had attempted to compel top-down changes in state and district practices through the threat of punitive measures, RTTT instead incentivised highly prescriptive – but entirely voluntary – reform from the bottom up (Mcguinn, 2012b). In short, cash strapped states stood to win up to \$700 million in federal funding if they adopted prescribed policies and programs including: measures to improve the quality of teachers and principals; performance-based evaluations for teachers and principals, based on multiple indicators of effectiveness (including student progress on standardised tests); common curriculum standards; the removal of caps on the expansion of high-quality charter schools; measures to turnaround the lowest-performing schools; and the construction and usage of data systems (US Department of Education, 2009). The winners of the first round were announced in March 2010, with the results of rounds two and three announced in August 2010 and December 2011 respectively. Eighteen states plus the District of Columbia were ultimately awarded grants totalling \$4.1 billion (US Department of Education, 2016b). A

⁵⁸ According to the National Center for Education Statistics (2018b), around 3.6 million teachers were engaged in classroom instruction in fall 2017. In 2018 TFA claimed close to 60,000 corps members and alumni. In other words, TFA affiliates constitute around 1.6% of the total teacher workforce (notwithstanding the fact that most alumni are no longer teaching). 83% of alumni report working in jobs that impact education in low income communities (Teach for America, 2019c)

recent analysis suggests that RTTT had the desired effect in so far as it augmented significantly the production of state policies that aligned with the president's education agenda (Howell & Magazinnik, 2017). However, a 2016 evaluation by the US Department of Education could not determine that RTTT had any significant effect on student achievement (Dragoset et al., 2016).

In May 2010, a *New York Times Magazine* cover story lauded the 'network of self-styled reformers,' that was fomenting changes in school districts all over the country in pursuit of Race to the Top dollars:

The standard profile is someone who went to a prestige college, joined Teach for America for a two-year stint and found the work and the challenges so compelling that he or she decided that education should be more than a layover before a real career. So they did more teaching or became involved running a charter school or a reform group, then kept moving up the ladder as sympathetic political leaders...took over cities or states and looked for people to overhaul school systems. (Brill, 2010)

In the estimations of education writer, Steven Brill, Race to the Top occasioned nothing less than 'a national coming-out party' for this 'far-flung network.' Indeed, 'TFA alumni would have a hand in shaping almost all of the reform plans created by the forty-six states that [competed] in the contest' (Brill, 2011, p. 175). In Colorado, for instance, TFA alumnus and state senator, Michael Johnston, leveraged the prospect of RTTT money to introduce dramatic revisions to the state's teacher evaluation and tenure laws. Bill 191 mandated that 50% of a teacher's performance evaluation would depend on student growth on standardised tests. To be granted tenure, teachers would need to be deemed 'effective' for three consecutive years and could lose tenure if they were found 'ineffective for two consecutive years' (Meyer, 2010). The reform was vehemently opposed by the Colorado National Education Association which represented 95 percent of the state's workforce. Indeed, Dennis Van Roekel, the NEA's national president, flew to Denver to

testify against it (Meyer, 2010). Nevertheless, Bill 191 passed into law on 12 May 2010, and was subsequently used as a model for legislators in Illinois and New Jersey (Robles, 2011).

In Tennessee – a first round RTTT winner – TFA alum and former senior staffer, Kevin Huffman, was enlisted in March 2011 to oversee the implementation of the state’s promised reforms. Huffman sought out fellow TFA alum and charter school magnate, Chris Barbic, to head up the state’s Achievement School District – to which the state’s bottom 5% of schools had been assigned. Together, Huffman and Barbic used Tennessee’s \$500 million RTTT award to instigate a welter of polarising changes, including the introduction of Common Core curriculum standards, the incorporation of student test scores into the state’s teacher evaluation system, and the enlistment of nationally prominent charter school operators to overhaul poorly performing district schools. While test scores rose during Huffman’s tenure, both he and Barbic left their posts exhausted by the backlash their efforts had incited (Burnette, 2015; Tatter, 2014). Upon Huffman’s resignation in November 2014, the House Democratic Leader lamented the climate of ‘hostility and mistrust’ that had arisen on Huffman’s watch (Boucher & Garrison, 2014). Michael Johnston’s efforts in Colorado would also occasion reprisals. In 2018, his bid for the state’s governorship was hampered by teachers’ union-funded attack ads indicting his record of ‘pushing conservative anti-teacher laws that hurt students’ (Robillard, 2018). Johnston’s signature legislative achievement is under threat too. A union-backed bill is currently before the Colorado legislature to reduce the student assessment portion of the teacher evaluation system that he steered into law in 2010 (Meltzer, 2019).

Throughout the rollout of RTTT senior Obama administration figures singled out TFA alumni-led reforms as exemplary instances of the sorts of efforts they had hoped to catalyse with the scheme (Horn, 2010). Moreover, of the dozen states that won grants under the first two rounds, all of them included in their applications a commitment to introduce or expand a TFA corps (US Department of Education, 2016b). In addition, under the separate Investing in Innovation (i3) tranche of RTTT, Teach for America was awarded a \$50 million direct grant to fund expansions in new and existing regions, further cementing a widespread perception that TFA was a darling of the administration.

In 2011, Arne Duncan inflamed an already acrimonious relationship with the teachers' unions when he declared in the presence of NEA President, Dennis Van Roekel, that '[no one] in the country has done more over the past 15 to 20 years than Wendy Kopp to identify the talents and characteristics that lead to great teaching' (Duncan, 2011). According to long-time *Washington Post* reporter, Valerie Strauss, this moment more than any other crystallised 'just how powerful [Kopp and TFA] had become. The fact that the NEA president stood there and listened to it and didn't walk off just showed how diminished his influence was and how much sway she had' (Strauss, Interview, 2017). A TFA commissioned report would later reflect that it was not just unions that harboured growing animus towards TFA during this period. Even other reform groups came to resent what they perceived to be undue favouritism of TFA (Mead et al., 2015).

Interviews with key protagonists confirm that TFA's close association with the Obama education agenda deepened hostilities among unions and other advocates of the traditional public education system. Jerry Hauser, TFA's COO from 1998 to 2005 observed that the backlash 'started to take hold after 2010 pretty hard':

At that point I think the unions – I can imagine the meetings that happened – ‘we have to get more serious about fighting this stuff – we have to get more organised. We can’t even shape the Democratic administration’s priorities.’ It think there was probably a sense that they were losing and that things were desperate...there was a much more strategic organised, coordinated effort to push back against TFA and reform generally (*Interview*, 2017).

Wendy Kopp corroborates Hauser’s recollection: ‘I just think that as things got more and more intense, the union leadership...did the analysis. I’m assuming they reflected on the role that our alumni were playing’ (*Interview*, 2017). Whitney Tilson offers this characteristically blunt assessment:

So I think the teachers’ unions have correctly recognised that...Teach for America has been the source of an awful lot of the headaches that the teachers’ unions have experienced in the past 20 years.

The entire education reform movement which has gone after a lot of the sacred cows of the teacher unions, you know – union solidarity and iron-clad job protection and “we’re all equally great teachers” as opposed to trying to differentiate among teachers...Teach for America has been a major catalyst in creating those headaches (*Interview*, 2017).

While they may have been slow to manifest, union reprisals against TFA in recent years have been quite effective as the ensuing sections detail.

Backlash: Blowback in School Districts

Increases in federal, state, and philanthropic funding, continued demand from school districts, and massive increases in applicant numbers in the wake of the financial crisis enabled TFA to open new regions every year until 2015, despite the increasingly fractious political climate. But TFA’s growing contentiousness during the Obama era made expansions into union strongholds much more difficult than they had been in earlier periods, even as the economy recovered and the tight job market was less of a sore point with unions. As previously mentioned, TFA experienced hitherto unparalleled trouble entering into Minneapolis in 2009-10 and Seattle in 2009-10. Since the Seattle expansion of 2011, TFA has only entered regions with comparatively weaker teachers’ unions: Ohio

in 2012, Kansas, in 2014, and Idaho in 2015.⁵⁹ It has not entered a new region since 2015. In recent years, union-backed campaigns in Minnesota and Nevada have successfully resisted TFA's efforts to grow its existing corps in those states (Mays, 2019). As demand from traditional districts has contracted under union pressure, TFA corps have been increasingly funnelled into charter schools (Waldman, 2019).

TFA has become sufficiently toxic in some places that schools districts have terminated the program. In 2013, under pressure from the local teachers' union, Pittsburgh rescinded its hiring contract with Teach for America. One Pittsburgh school board member claimed that continuing with TFA was tantamount 'to an attempt to break organised labour' (Zullo, 2013). In August 2014 the school board of Durham, North Carolina, voted 6-1 to 'definitively sever ties' with TFA (Hasan, 2014) and in May 2016, the San Francisco school board suspended its contract indefinitely (Tucker, 2016). Houston Independent School District – one of TFA's earliest partners – followed suit in May 2019, ending a relationship of more than 25 years. 'TFA is an organisation that is problematic' board member Elizabeth Santos said. 'It de-professionalises teaching, increases turnover and undermines union organisation' (quoted in Carpenter, 2019). Despite a worsening teacher shortage, California Democrats have twice brought forward a union-backed bill to prohibit teachers in 'third-party credential programs' (an earlier

⁵⁹ While estimating teacher union strength is not straightforward, Winkler et al.'s (2012) index provides a useful indicator. The authors rank the relative strength of state teachers' unions from 1 to 50 (with 1 being the strongest) on the basis of: resources and membership; contributions to political parties, candidates, and campaigns; the scope of bargaining permitted under state laws; the extent to which state education policies align with traditional union interests; and perceptions of union influence as gauged through a survey of other education stakeholders within each state. Washington state ranked 10th in terms of overall union strength, but 3rd for union membership and resources – the indicator of strength considered most important by other authors (c.f. Finger, 2018). Minnesota was ranked 14th overall but was tied in 3rd place with Washington for membership and resources. Ohio was ranked 12th overall (20th for membership and resources). Kansas was ranked 32nd overall (33rd for membership and resources). Idaho was 36th overall (30th for membership and resources).

draft of the bill named TFA explicitly) from working in low-income schools unless they commit to a minimum of five years' service (Mays, 2019). While the bill failed to pass for a second time in May 2019, it did receive the assent of the assembly's education committee and its sponsor – a former teacher – plans to revive it in the next legislative session (Harrington, 2019). In short, for the past five or so years TFA has been on the defensive and has lost ground in traditional school districts, especially in those with comparatively robust teachers' unions.

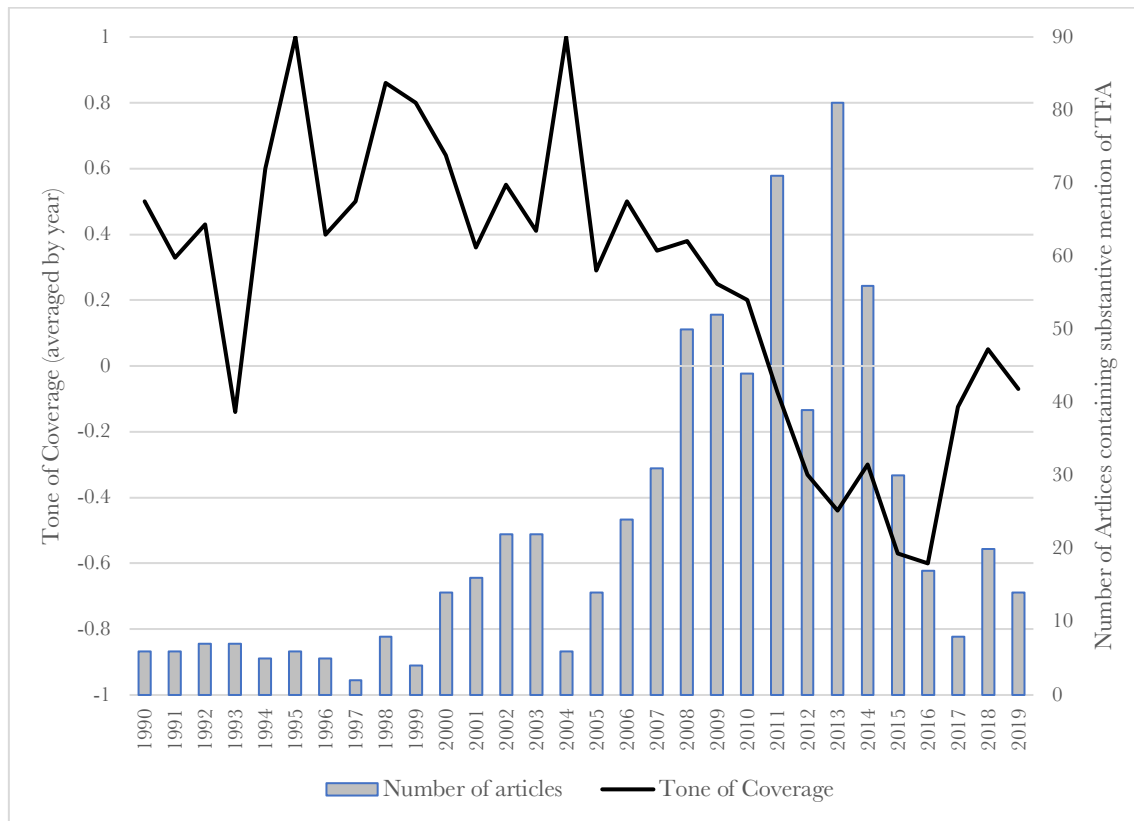
Backlash: Anti-TFA Campaigns on Campus and in the Media Diminish Recruitment

Once a media darling, TFA has had to contend with much more mixed coverage in the national press in recent years. Anti-TFA activists have engaged in a protracted campaign to alter TFA's public image from a celebrated national service organisation to a driver of nefarious 'corporate education reform.' Content analysis of national print media over the duration of TFA's existence demonstrates the organisation's heightened public salience from around 2008 onwards as Rhee and other alumni took up prominent positions.⁶⁰ As Figure 9, below shows, from 2010 onwards, the tenor of coverage grew increasingly

⁶⁰ A search for the term "Teach for America" was performed using FACTIVA, a comprehensive online database of print media for the dates 1 January 1990 to June 2019, on the assumption that national newspaper coverage is a reasonable proxy for the public salience of an issue or topic. The *Washington Post*, *New York Times*, and *Wall Street Journal*, were surveyed because these mastheads are among America's highest circulation daily newspapers and have an explicitly national, as well as regional, remit. The search returned a total of 681 articles containing a substantive mention of TFA. Articles were read and classified as positive (+1), neutral (0), or negative (-1), in tone. An article was classified as positive if it made more approving references to TFA than disapproving ones. Balanced articles that took no clear position on the merits of TFA but canvassed praise and criticism of the program broadly equally were classified as neutral. Purely factual reports about the operations of the organization or the activities of alumni were also classified as neutral. Finally, pieces that made mostly disapproving references to TFA were classified as negative. To construct a picture of the tenor of TFA coverage over time, I counted the number of articles per year and multiplied this by the average tone of the articles for that year. For example, in 1990, 6 articles in the sampled newspapers contained substantive coverage of TFA. Three articles were positive (+1) and three were neutral (0), yielding an annual average tone of 0.5: $([3*1] + [3*0])/6 = 0.5$. By contrast in 2013, there were 81 articles about TFA, 11 of which were positive, 46 of which were negative, and 24 of which were neutral, yielding an annual average of -0.44: $([11*1] + [46*-1] + [24*0])/81 = -0.44$.

negative as TFA became inextricably associated with the controversial measures instigated under Race to the Top and alumni continued to advance ‘very specific ideas about school reform’ opposed by the education establishment (Cersonsky, 2012).

Figure 9: Print Media Coverage of Teach for America, 1990 to 2019



2013 was an *annus horribilis* for TFA’s public profile, as a string of alumni added their own voices to a growing chorus of public denunciation. In January that year, newly minted alumnus, Matt Barnum, penned a piece in the *Washington Post* arguing for the wind up of his erstwhile employer. Though TFA had ‘had a huge – and in [his] view – positive impact on education since it started,’ the organisation ‘had run its course.’ TFA was no longer ‘only filling positions that would otherwise go to long-term subs,’ and was sucking up scarce resources that would be better directed towards organisations that more effectively recruit and train teachers for the long term, not just two years. Moreover,

while TFA's endeavours to raise awareness of educational disadvantage and build an advocacy coalition had undoubtedly succeeded, it had 'reached a critical mass on this point...It's difficult to see how pumping in several thousand additional corps members each year won't lead to diminishing returns' (Barnum, 2013). In July, the *Washington Post* featured extensive criticism from another alumna and ex-manager, denouncing TFA's opaque and inefficient financial structure, inadequate training of corps members, and 'inability to address valid criticism' (Strauss, 2013a).

These alumni dissidents made especially compelling copy for education reporters. Unlike union leaders and teacher educators, new alumni had no obvious self-interest in criticising an organisation to which they had just devoted a year or more of their lives (Brewer, *Interview*, 2017; Ravitch, *Interview*, 2017; Strauss, *Interview*, 2017). In the summer of 2013, the 'TFA apostate' angle garnered yet more coverage when a committee of alumni-scholars, -parents, -activists, and current corps members organised a summit in Chicago billed as 'Organising Resistance Against Teach for America and its Role in Privatisation.' Among other objectives, attendees hoped to orchestrate an 'overhaul of [Teach for America's] dominant role in educational reform.' With obvious relish, *The American Prospect* reported the gathering under the headline 'TFA's civil war' (Cersonsky, 2013a, 2013b). *The Atlantic* (Schonfeld, 2013) and *The Washington Post* also wrote features. In September, *The Atlantic* returned to the topic of TFA discord, with a feature entitled 'I Quit Teach for America.' 'By finally showing I don't believe that American education can be saved by youthful enthusiasm, I feel more like a leader than I ever did inside the corps' concluded the author, Olivia Blanchard (2013). The next month, *Slate* published another damning piece. 'As a professor of education at Tulane, I no longer write Teach for America letters of recommendation for my students' declared alumna Catherine

Michna. ‘TFA members do not work in the service of public education’ she contended. ‘They work in the service of a corporate reform agenda that rids communities of veteran teachers, privatizes public schools, and forces a corporatized, data-driven culture upon unique low-income communities with unique dynamics and unique challenges’ (Michna, 2013).

The welter of bad press had an immediate and observable effect on TFA’s recruitment. In 2014, application rates plummeted and the corps size declined for the first time in 15 years. Applications were down another 10 percent in 2015 (Rich, 2015). Though an improving economy likely played a role, TFA attributed the downturn, at least in part, to the ‘contentious national dialogue’ surrounding TFA’s impact on schools and its broader entanglement in education reform debates (Darville, 2014; Mead et al., 2015). Around the same time, national student labour organisations mounted a campaign to remove TFA recruiters from college campuses and distributed materials aimed at dissuading students from joining TFA (R. M. Cohen, 2015). In September 2014, for instance, members of the Student Labour Action Movement at Harvard wrote to the university President, Drew Faust, demanding that Harvard sever ties with TFA unless TFA agreed to send students only to areas in which there was a genuine teacher shortage, provide corps members with more training, and cut ties with corporations that ‘threaten teachers unions’ (Klein, 2014). In 2019, students at UC Berkeley – historically one of the most prolific sources of TFA corps members – implored the university administration to rescind Wendy Kopp’s invitation to give the commencement address (Sullivan, 2019) ‘People are realising that Teach for America alums like Kevin Huffman and Kaya Henderson are driving key changes in places like Tennessee and D.C., and various groups have decided that the best way to stop the trend is to prevent people from joining Teach for America

in the first place’ noted Elissa Kim, who oversaw TFA’s recruitment until 2015 (quoted in Mead et al., 2015, p. 66).

TFA’s increasingly toxic status among progressives also saw long-time political allies distance themselves from the organisation. During the 2016 Democratic Primary, Hillary Clinton recanted her previously fulsome support for TFA when she addressed the National Education Association in a successful bid for its endorsement. ‘There was an argument for Teach for America, but I think we’ve learned a lot about how difficult it is for people with 6 to 8 weeks’ training to manage a classroom, to be able to really teach in a way that inspires and produces results’ she told union leaders (Antonucci, 2016). Her rival for the nomination, Bernie Sanders – a long-time TFA sceptic, also criticised the organisation and has done so again during the 2020 presidential race (Camera, 2019; R. M. Cohen, 2019).

TFA evolves, but changes alienate erstwhile supporters

In February 2013 Wendy Kopp left Teach for America to head up its global analogue, Teach for All. Incoming Co-CEOs Elisa Villanueva Beard and Matt Kramer confronted the ‘massive public affairs crisis’ by boosting TFA’s media team so the organisation could ‘respond more rapidly to external events and attacks’ (Mead et al., 2015). Alumni and reform movement allies founded ‘Corps Knowledge,’ a group dedicated to publicly ‘defending, promoting, and supporting’ the work of TFA and its alumni in traditional and social media (Corps Knowledge, 2015). To combat the damaging (and outdated) cliché that TFA was comprised of rich Ivy Leaguers doing ‘voluntourism’ in poor minority communities, TFA redoubled its efforts to increase the diversity of the corps and to place

teachers into regions where they had lived, attended school, or previously volunteered.⁶¹ The official rhetoric around the two-year service commitment also changed. As recently as 2011, Kopp had publicly pondered whether ‘enough of our people are *leaving* teaching. Are enough of them going into policy...are enough of them going into business?’. In 2013, new co-CEO Matt Kramer declared that ‘teaching beyond two years cannot be a backup plan – it has to be the main plan’ (quoted in Goldstein, 2014b). TFA also undertook to ‘temper a data-driven nature with a greater appreciation for human stories,’ ‘align placements with local demand, not national plans,’ and invest more in teacher preparation and support (Mead et al., 2015, pp. 65–66). Under Villanueva Beard, who became TFA’s sole CEO in 2015, the organisation has become slightly less reticent to take public positions on certain policy questions, but TFA continues to avoid explicit position-taking on the really contentious K-12 debates like charter schooling and merit pay.

Since the election of Donald Trump and the appointment Betsy DeVos as Education Secretary, TFA has been able to find common cause on a number of political issues with the teachers’ unions and other critics on the left. For instance, on 23 November 2016 a TFA news release deplored Trump’s ‘indisputably hostile and racially charged campaign,’ urged DeVos to uphold ‘diversity, equity, and inclusiveness,’ before demanding, among other things, the preservation of the Obama administration’s Deferred Action for Childhood Arrivals program which granted legal status to certain illegal immigrants brought into the United States as children (Teach for America, 2016c). Yet TFA has

⁶¹ The TFA Corps of 2014, while notably smaller, was the most diverse ever. 52% of the class identified as people of colour, compared with less than 20 per cent of all teachers nationwide, and 47% were Pell Grant recipients – a proxy for low-income background. One third of the cohort came to TFA after a graduate school or professional service (Teach for America, 2014; US Department of Education, 2016a).

remained noticeably quiet on other issues *du jour* that arguably concern their core mission more directly. For instance, there was no media release or public condemnation of Bill De Blasio's effort to roll back charter schools in New York City – despite the fact that NYC charters employ thousands of TFA corps and alumni. DeVos' ardent advocacy of school choice has rendered charter school support toxic for many Democrats, which in turn makes life complicated for TFA – an organisation comprised overwhelmingly of Democratic party supporters (Vyse, 2017). 'The whole Trump DeVos thing has really turned everything up on its head' laments Whitney Tilson (*Interview*, 2017).

It is unlikely that TFA's selective political position-taking has in any way assuaged its many detractors in the K-12 establishment. But it 'might help [TFA] reconnect with younger millennials nursed on race-and-gender theory' muses TFA alumni-cum-conservative commentator Sohrab Ahmari (2017). On the other hand, TFA's increasingly progressive positioning is alienating erstwhile supporters on the political right, who feel that today's organisation has lost the courage of its earlier convictions. As Rick Hess observes, 'TFA has to try to continue to do this thing where it has a membership that is pretty fervently left, where its agenda is pretty fervently left, but it can find points of agreement with people on the right.' This bipartisan balancing act, which has been crucial to the organisation's longevity and success to date, is liable to become increasingly difficult even if the Trump interregnum is over by 2020: 'Imagine you get an Elizabeth Warren, or a Kamala Harris in the White House,' says Hess:

There's tonnes of people in the TFA network who would be like 'wooo-hooo,' but institutionally I can see that being a sh*t-storm for TFA because that would also mean that the AFT and the NEA were back in the mix...all of these folks who see TFA as an emblem of the problem...Institutionally, TFA would be in trouble and then to the extent that TFA was having to lean on Republicans that would be difficult because TFA has moved so far to the cultural left recently (*Interview*, 2017).

Like many individuals and organisations in contemporary America, TFA is finding the intense political polarisation of the present moment difficult to navigate.

Conclusion: Whither TFA? Whither the reform movement?

In sum, it took the teachers' unions a long time (as well as an historic contraction in the job market) to realise that Teach for America posed a consequential threat to their interests. Since that realisation, however, union behaviour towards TFA has changed significantly. Through a deliberate and coordinated union-backed campaign, TFA has lost a lot of lustre in recent years. Though it retains the patronage of many powerful policy makers⁶², it seems unlikely that the Teach for America can recover the 'rhapsodic' public reputation it enjoyed in the heydays of the 2000s (Goldstein, 2014c). Corps sizes are forecast to shrink over coming years, school districts continue to rescind contracts, and TFA has lost the confident air it once exuded under Wendy Kopp as the preeminent provider of the reform movement's leading lights. The reform movement too, seems if not a spent force, a mere shadow of its former self: 'after years of prime-time play with Oprah, "education nation" glitz, State of the Union applause lines, and political relevance, 21st-century education policy has reached its afternoon re-run stage' concludes Hess (2018).

Having won important concessions at the state level in recent years through bold strike action, teachers' unions are resurgent and have regained public support since the nadir

⁶² In 2016, TFA issued press releases to thank their 'congressional champions' – politicians who have, over the years, distinguished themselves with strong support for TFA. The list included Sen. Michael Bennet (D-CO), Rep. Susan W. Brooks (R-IN), Rep. Tom Cole (R-OK), Sen. John Cornyn (R-TX), Sen. William Cassidy (R-LA), Sen. Mazie Hirono (D-HI), Chairman John Kline (R-MN), Sen. Barbara Mikulski (D-MD), Sen. Patty Murray (D-WA), Sen. Mitch McConnell (R-KY), Rep. Bobby Scott (D-VA), Sen. Roger Wicker (R-MS) (Teach for America, 2016a).

of the Obama years (Ferguson, 2018). The AFT and NEA have re-kindled strong relationships with the Democratic party. Indeed, an ebullient Randi Weingarten recently rallied her membership by recalling that ‘ten years ago, *Time* magazine emblazoned its cover with this image of a school superintendent sweeping out so-called “bad teachers.” Today, presidential candidates are one-upping each other with their support of teachers and public schools’ (Weingarten quoted in Respass, 2019). The superintendent in question was none other than Michelle Rhee, who now maintains a decidedly low public profile.

Education reforms that have created their own vested interests have so far withstood the current backlash. Charter schools, for instance, have fared reasonably well against the onslaught, though the pace of charter school growth has slowed in recent years. Until 2013, the total number of charter schools was increasing by 6-8% annually. Since then, the rate of increase has fallen steadily to less than 2 percent by 2016 with the decline attributed in part to teachers unions’ ‘stepping up their resistance strategies’ and ‘coordinating opposition campaigns with local school districts and attorneys’ (Lake et al., 2018). Charters are more robust to reprisals because they are self-reinforcing – charter-patronising families have a powerful vested interest in preserving their schools and can be readily organised to see off political threats as New York Mayor Bill de Blasio discovered when he took on the city’s charter sector in 2014 (Bergner, 2014; Greene, 2015). Simultaneously, because charter schools tend not to be unionised, growth in the charter sector directly diminishes the membership and resources of teachers unions, and with that the major source of anti-charter school muscle. The eventual unionisation of charter schools is of course possible, but so far there are only a tiny handful of instances of charter unionisation. Moreover, unionisation is hampered by the fact that organising must

proceed charter school by charter school – a slow and arduous process. The charter sector, in turn, has a powerful vested interest in programs like TFA that provide a ready source of malleable and amenable labour. As traditional districts have reduced or abandoned their contracts with TFA, the charter sector has sustained overall demand for TFA corps members, creating something of a soft landing for the organisation (Waldman, 2019).

Other reforms propagated by TFA alumni and allies have, by contrast, proven less enduring. For instance, tougher teacher evaluations and merit-based pay have generally not fared well outside of school districts where charter schools predominate. The IMPACT teacher evaluation scheme in Washington DC has been bedded down, but DC is far from typical. D.C. schools are subject to mayoral rather than elected school board control, the local union is seriously weakened by the preponderance of non-unionized charter schools in the district, and since 2007, D.C.'s school administration has been dominated by a succession of hard-charging TFA-alumni reformers.⁶³ Elsewhere, rigorous teacher evaluations have been repealed outright, while others have been substantively watered down or frustrated in implementation (Loewus, 2017). Both the relative success of the IMPACT model in DC and the failure of merit pay and tenure reforms in more traditional school districts underscore the potency of motivated agents in structuring institutions. As Greene, Moe, and others correctly point out, reforms to teacher evaluations and compensation are distinctly vulnerable to reversal, because they create no concentrated vested interest of their own (Greene, 2015; Moe, 2017). The

⁶³ Michelle Rhee was Chancellor of the District of Columbia Public Schools from 2007 to 2010. She was succeeded by fellow TFA alumna Kaya Henderson who led the District from 2011 to 2016. TFA alumna, Hanseul Kang, has been the State Superintendent of Instruction since 2015 creating an unbroken chain of TFA-spawned reformers at the top of D.C. school administration for over a decade.

median teacher has little to gain and potentially much to lose from more robust performance evaluations. The gains to students and families are diffuse and hard to observe, so it is hardly surprising that the last few years have witnessed significant erosions to the concessions won during the first term of the Obama administration. In marked contrast to the charter movement, where parents and families advocate to retain the schools they have chosen for their children, in places where teachers unions are strong there is rarely a sufficiently concentrated and durable constituency to defend merit pay and tenure reforms against sustained assaults.

The trajectory of TFA – from a shoestring operation responding to teacher shortages in the 1990s, to the darling of a burgeoning reform movement throughout the 2000s and early 2010s, to the *bête noire* of the education establishment – at once captures the potency and inherent limitations of a subversive changemaking strategy. In successfully instigating consequential changes to the American education system, Teach For America ultimately relinquished the obscurity and apparent benignity that first permitted the organisation to gain a foothold in the K-12 system. While the organisation has so far withstood existential threats from its adversaries, TFA now faces a contested future and its alumni and fellow travellers are encountering significant difficulty in further advancing changes that imperil the interests of resurgent unions and impassioned defenders of traditional district-run K-12 schooling.

7. Conclusion

In this final chapter, I recap the key empirical findings of this thesis and distil the key factors that permitted Teach For America to play a critical and outsized role in education politics in recent decades. Quite simply, TFA is integral to the story of contemporary American education reform because it injected into the system significant numbers of reformist agents over a sustained period. Over the past thirty years ascendant neoliberal ideas have adjusted the rules of the game – creating room for new players. Likewise, major philanthropic investment has put new resources at the disposal of disruptive actors. But top-down reforms and new money did not in themselves *create* the new actors required to realise change on the ground. Similarly, while various developments in certain jurisdictions have somewhat weakened unions – the preeminent the defenders of the status quo, reform requires motivated agents to move into the vacuum left behind by receding union power. Teach for America, more than any other pipeline of human capital, provided the *players* who could grab the ball and run it downfield. TFA was able to accomplish this feat because, at the point at which it was established, there were few outward signs that it was capable of such a profound impact. Consequently incumbent groups that would later turn on TFA with a vengeance, largely left the incipient organisation alone. Now that TFA is widely recognised as generator of disruptive personnel and innovations, not merely an alternative source of teaching labour, its capacity to foment further change is somewhat diminished. Hence the case of TFA illustrates at once the potential and limitations of subversive, bottom-up change, and offers more general insights about the dynamics of policy systems more generally.

In the final pages of this thesis I look at the parallels between the TFA case and other instances where the discretionary action of programmatically-motivated agents has

instigated change in the teeth of opposition from powerful vested interests. I revisit some of the examples of subversion introduced in Chapter 3 and explore some new cases. This discussion does not test exhaustively the extension and limitations of the concept through systematic case comparisons. Rather, I aim simply to illustrate some of the concept's scope and generalisability, by demonstrating its capacity to travel across different policy domains and political regime types. In so doing, I begin to identify where further theoretical and empirical effort might be best directed, if the concept of subversion is to develop into a fully-fledged mid-range theory. Finally, I briefly canvas Teach for America's burgeoning international impact. It is something of an irony that just as Teach for America was encountering severe headwinds in the US, the TFA model was spreading rapidly across the globe under the auspices of the Teach for All network (TFAll). Like Teach for America, other 'Teach For' organisations channel carefully selected participants into vacant teaching jobs, but unlike TFA, these organisations have positioned themselves as 'leadership pipelines' from the outset. Thus, they do not share TFA's subversive quality. The size and spread of 'Teach for' organisations would seem to benefit from multiple venues and roughly correspond with the relative strength of incumbent groups to resist potentially disruptive organisations, though a key driver of TFAll's diffusion appears to be a transnational networks of elites. I suggest that the internationalisation of the 'Teach For' phenomenon and its transfer into other policy domains in the UK present fruitful areas of further research for scholars of education policy and public administration alike.

A case of subversion

Teach for America was not founded with the explicit intention of disrupting the educational establishment, but it evolved relatively quickly into a critical driver of

innovations and key source of personnel that challenged traditional practices and structures throughout the 2000s and 2010s. Both boosters and detractors concur that TFA has had a distinctive and consequential effect on the contemporary education system, and that without TFA the education reform movement would be smaller, less connected, and less impactful. Crucially, TFA had the distinct advantage of powerful groups only belatedly recognising the organisation's capacity to instigate reform. The obliqueness of TFA's initial ambitions and its apparently modest capacities enabled the organisation to gain a foothold in a system that has typically resisted disruptors and disruption. Teach for America's present travails show that had teachers' unions and other incumbent groups anticipated its long-run impact, TFA's establishment and expansion would have faced much more concerted resistance.

It is impossible to know whether the gradual transition in TFA's outward identity from labour solution to leadership pipeline was consciously orchestrated by Wendy Kopp from the very outset or the product of opportunistic evolution over time. The official TFA line is that Kopp always foresaw TFA's mission in grander terms, but nowhere is that ambition recorded in TFA's early publications nor in Kopp's thesis. Short of a crystal ball, few observers would have predicted the TFA of the early 1990s would have become an education sector powerhouse by the late 2000s. In any case, whether the morphing of TFA's outward mission was the product of premeditated subterfuge or of gradual, opportunistic adjustment, it is immaterial to the execution of a subversive approach. Subversion, as defined here, depends on incumbent groups failing to anticipate the potential of rival agents until consequential change is already underway. This failure may result from deliberate misinformation or obfuscation on the part of subversives about their true preferences and capacities, but it need not. Incumbent calculations about potential

rivals may be imperfect simply because what was true of rivals at one point in time ceases to be true at a later stage, and incumbents may be too slow in updating their understanding and acting upon it. Teachers unions were slow to identify Teach for America as a source of disruptive agency in large part because they took TFA's early self-description at face value. By the time good information emerged about TFA's systemic effects, prompting unions and other incumbent groups to update their beliefs, TFA had been catalysing consequential change for some time. Moreover, large numbers of TFA alumni were already embedded in the system, and no union-led attack on TFA's future activities could change that fact.

While a major injection of philanthropy directed towards new actors, a weakening of teachers' unions and the general ascent of market-oriented thinking in public administration during the 1990s and 2000s all contributed to the progress of the reform movement, these explanations are not in themselves a sufficient account of the observed changes in the structure of the American education system. New ideas about choice, competition, and accountability, combined with the partial transfer of education policymaking from local venues to state and federal governments where unions held less sway, enabled the passage of legislation that created space for new actors with different ideas about pedagogy and school organisation to enter the system. But neither of these developments provided the *supply* of entrepreneurial agents capable of creating the new schools and teacher training pathways, nor did they create in themselves a critical mass of agents motivated to implement with fidelity tougher teacher evaluations or merit-based compensation schemes. New money for entrepreneurial endeavours was of course crucial, but as the philanthropic misadventure of the early 90s Annenberg Challenge showed, money only buys change if it connects with sympathetic and strategically

positioned agents. TFA provided these agents. Table 11, below, summarizes the empirical evidence arrayed in the course of this thesis against the individual sufficiency of these explanatory factors and underscores the indispensability of embedded agents as drivers of change, alongside money, ideas, and weakened obstruction.

Table 11: Alternative explanations, observable implications, empirical findings				
Alternate Explanation	Contention	Observable implications	Empirical findings	Conclusion
New Money	Increased philanthropic investment in K-12 education has catalysed reform in recent decades	If philanthropic investment alone is sufficient to catalyse significant change in the K-12 system then the Annenberg Challenge (at the time the biggest private investment in K-12 education) ought to have produced significant changes in the school districts that received the money.	• Official evaluations confirm that the Annenberg Challenge failed to reap any significant change in practices or improvement in outcomes in target districts. • Annenberg failed because the recipients of the money were vested in the status quo. • The Annenberg failure was a salutary example for the ‘new edu- philanthropists’ of the 2000s. • As Eli Broad intones ‘we [came] to believe that our money could work best where we found real change agents to make it work.’ Giving money to districts directly only entrenched the status quo because ‘the teachers’ union were running the show’ (Broad quoted in Brill, 2011, p. 93) • Because of this fact, the new breed of philanthropists – Gates, Broad, Walton etc. very deliberately sought out sympathetic agents, such as TFA, KIPP, etc. that promised structural change.	For new money to have an effect, pro-reform philanthropists needed to connect with sympathetic and effective agents, embedded in the system and capable of direct action. Without sympathetic agents philanthropic efforts were liable to succumb to the very same principal-agent problems that beset the Annenberg Challenge

New Ideas	The dominance of neoliberal ideas among policymakers since the early 1980s resulted in choice and accountability reforms that have altered the realities of the American education system	If the ascent of neoliberal ideas among policymakers was in itself sufficient to produce changes then the publication of <i>A Nation at Risk</i> would have transformed the system in short order; charter school enrolments today would be significantly larger (in line with manifest demand); robust teacher evaluations would be ubiquitous and they would routinely find the performance of non-trivial percentages of the teacher workforce to be unsatisfactory; teacher tenure would be a relic of the past.	• Choice and accountability reforms instigated at higher levels of government throughout the '90s and '00s have struggled to overcome veto points and recalcitrant agents. • The education 'establishment' – i.e. the bulk of K-12 teachers, their unions, many educational administrators, and teacher educators – never embraced the choice and accountability regime, despite significant and enduring bipartisan consensus among state and federal policymakers. • Charter growth accelerated well after most states had laws permitting charter schooling because until the mid-2000 the sector was insufficiently mature to capitalise on the legislative openings; a critical mass of agents had to come together to set up schools and form coalitions capable of defending them against anti-charter forces and this took time. • Even today the charter sector remains significantly smaller than demand would dictate, because vested interests have resisted charter growth.	As Rick Hess says 'while public policy can make people do things, it cannot make people do those things well' (2013, p. 19). Top-down reformers need compliant agents to <i>execute</i> choice and accountability policies on the ground. Until distinctive and sizeable human capital pipelines like TFA appeared, compliant agents were thin on the ground.
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			In most places, laws demanding tougher teacher evaluations have proven toothless as principals and administrators have been reluctant to make adverse judgements about job performance, even as student attainment remains unsatisfactory.	
Weaker Vested Interests	The weakening of teachers' unions through various means (right-to-work laws; a shift from local to state and federal venues; shifts in public sentiment etc.) has allowed change to occur in certain places.	If union weakness alone is sufficient to produce change then reform should be more advanced in states with comparatively weaker unions, <i>even in the absence of TFA and other reformist groups</i>	- Analysis of state-level K-12 reform shows that the presence of TFA has a significant effect on state policy settings even after controlling for union strength. - It is inconceivable that the New Orleans school system would look like it does today in the absence of the coalition led by TFA. - Shifts in education policymaking to higher levels of government has certainly allowed some choice and accountability legislation to pass against union wishes, but governance venue changes cannot overcome principal-agent problems in implementation. Reform lives and dies with the discretionary actions of frontline agents.	It is not enough to remove or tamp down the blocking influence of the teachers unions. Certainly, union weakness creates an opportunity for reform, but it does not automatically realise it. Wholesale reform (a la New Orleans) requires a cadre of street-level agents and sympathetic lieutenants to exploit the opportunity afforded by weakened vested interests.

Creating a cadre of subversive agents: selection, treatment and network effects

TFA has instigated change by taking a distinctive approach towards the selection, treatment, and networking of the individuals it brought into the American education system. By placing corps members on the frontlines and supporting their incremental ascent into positions of greater influence, TFA embodied a ‘bottom up’ strategy of changemaking that avoided the principal-agent problems that had plagued past efforts at top-down education reform. Significantly, however, this was a bottom-up effort that relied on the mobilisation of elites. TFA disproportionately recruited those at or near the top of America’s social and economic scale – or those destined to be by virtue of their elite educations and aptitude – thereby creating a cadre of highly motivated, well-connected (in every sense), change-oriented agents that simply did not exist on any meaningful scale beforehand.

Through direct classroom experience and explicit TFA training, corps members and alumni developed a common set of ideas about the inadequacies of the American education system, the unjustness of educational inequalities, and the urgency of reform. Having been exposed to the shortcomings of America’s struggling schools, many decided to devote their careers to changing the system. Over time, TFA has developed programming and devoted considerable resources to help corps members and alumni to secure positions of greater impact and influence and to remain connected with one another. In the past few decades, this network has exploited openings created by the choice and accountability reforms of the 1990s and 2000s to build large charter networks, new teacher training pathways and other human capital development pipelines that now rival the hegemony of the traditional education system in some of America’s biggest cities. Challenging incumbent hegemony is not the same as supplanting it, however, and there

are good reasons to believe that the progress made by the reform movement over the past few decades has slowed.

Teach for America's legacy and future

The elite quality of TFA's corps and the organisation's 'data-driven' technocratic orientation has undoubtedly enabled the organisation to project outsized influence, but this approach has created its own set of problems. From the beginning, the education establishment criticised TFA corps members as privileged, over-earnest dilettantes and interlopers motivated by a misguided sense of *noblesse oblige*. Educationalists condemned as woefully naïve and patronising TFA's conviction that the complex and deep-seated problem of educational inequality could be tackled by recruiting the 'best and brightest' to teach for a couple of years. This anti-elite critique has gained additional resonance in recent years as a broader backlash against the economic and political establishment has taken hold in the United States. Ross Douthat is far from alone in identifying 'a distrust of technocracy – the sense that the smartest guys...can't really be trusted, the feeling that the whole model of credentialled meritocracy is corrupt and self-dealing and does not deliver on its promises' as 'one of the key forces in American politics right now' (2019). Despite sustained and largely successful efforts to diversify its intake, TFA continues to be perceived as a symbol of bi-coastal liberal elitism exerting undue influence over disenfranchised communities. 'There are a lot of people [in the traditional education world] who would say "screw those elites,"' observes non-profit leader and charter school advocate, Ethan Gray:

These are good people who have worked hard and played by a set of institutional rules and have gotten into positions of influence only to see a new generation of more "elite" folks from brand name universities getting involved in issues that previously they were not as involved in. And that's complicated...I think there's something important to connect between the pushback against organisations like TFA - the slowing growth of the organisation, maybe even the retrenchment of

it...and the broader political atmosphere that we live in which is highly sceptical of elites...highly sceptical of outside power and outside influence...Teach for America is getting wrapped up in this, it is becoming part of institutional America, elite America. The people who go to the Teach for America summit go to Davos. There's a thread in all of this where if you're looking for what the future holds for TFA I think there's a lot of uncertainty (*Interview*, 2018).

It is an open question whether or not TFA can maintain its present size and continue to underwrite reform now that it is widely recognised as a catalyst for changes that the education establishment deeply resents and fiercely opposes. As Chapter 6 reported, erstwhile allies have edged away from TFA in recent years and the organisation has been expelled from school districts where it was once welcome. A rapprochement between the teachers unions and the leading lights of the Democratic party does not bode well for TFA, nor for the causes that its most celebrated (or notorious) alumni have actively abetted, such as teacher accountability and charter schooling (Camera, 2019). At the same time, TFA's very public denouncements of education secretary Betsey DeVos, and ardent support for DACA, transgender rights, and other *causes du jour* among social liberals have alienated Republican backers. 'One of the reasons [TFA] was able to grow so fast was [because] they did not mind making alliances with Republicans' notes education journalist Jennifer Berkshire, 'and that seems to have become impossible now' (*Interview*, 2017). Torn between pro-reform patrons and establishment critics – some of whom need to be placated if TFA is going to continue operating in traditional school districts – Teach for America today finds itself in a delicate position. Table 12, below, summarizes the organisation's trajectory and surveys the evidence adduced in this thesis to support a subversive explanation for TFA's ascension, substantial influence, and present travails.

Table 12: Summary of Process Tracing Findings

Conceptual Element	Observable Implications	Type of Test (Hoop, Smoking Gun, Straw-in-the-wind)	Summary of Evidence
1. Set-Up A. Aspirations for change	1. Organisation of sub-system agents is founded to address specific unmet need in sub-system 2. Organisation's leaders have, or develop with time, a preference for systemic transformation	Hoop test passed Hoop test passed	- Early TFA publications present TFA as a pragmatic effort to alleviate teacher shortages in struggling urban and rural schools (Ch. 4) - In early TFA promotional materials there is no mention of fostering 'change agents' or leaders for systemic reform though Kopp is adamant this was the objective from the very outset (Ch. 4). By its second decade, however, TFA publicly declares its ambition to instigate systemic change through the production of 'leaders' (Ch. 5)
B. New agent-based organisation has uncertain capacities	1. Organisation's capacities to affect change are uncertain because: - Organisation is weak relative to incumbent groups And/Or - Organisation's preferences towards systemic change are initially <i>outwardly</i> ambiguous	Hoop test passed Hoop test passed	- Contemporaneous writings and interviews with key staffers stress that TFA was a small and financially contingent operation in early years; for much of first decade struggled to avoid insolvency (Ch. 4) - TFA could only enter school districts at the behest of incumbents; district boards and superintendents exercised veto power over TFA operations, and these entities are beholden to union interests in most places (Ch. 4) - Early official TFA statements are deferential towards certified career teachers and teachers unions. No declared intention to foster leaders for systemic change until much later (Ch. 4) - Founding TFA staff recollect congenial relations with unions in early years (Ch. 4)
C. Incumbents have imperfect information	1. Incumbents do not perceive disruptive potential of nascent organization and therefore do not attack it	Hoop test passed	- Union representatives offered lukewarm support for TFA, provided it did not supplant traditionally trained and certified teachers (Chs. 4 & 5) - Statistics on TFA's cohort sizes and diffuse distribution in areas of shortage confirm that corps members were not displacing certified unionised teachers in early years (Ch. 4)

			- Contemporary accounts and recollections from school board members, principals, and superintendents indicate that TFA was considered a 'least worst' solution to teacher shortages (Ch. 4) - TFA initially posed no obvious threat to unions' core interests: protecting the jobs and conditions of members (Ch. 4) - Reform agenda that TFA would ultimately catalyse and accelerate was very nascent in early 1990s (Ch. 4) - Kopp TFA organization in general have conscientiously avoided taking public positions on education reform debates throughout the organisation's history (Chs. 4 & 5).
D. Foundations of subversive action	1. Organisation brings together individuals who are dissatisfied with status quo 2. Over time, organisation provides resources and conditions to support agent-instigated change-making	Hoop test passed Smoking gun found	- TFA statistics and statements from senior staffers over many years confirm that recruitment strategy explicitly and successfully targeted individuals who manifested an ambition to bring change to the education system (Chs. 4 & 5) - Elite educational and social background of many participants helped to build a powerful alumni network (Ch. 4). - TFA programming encourages participants to draw common conclusions about reasons for system failure (Ch 4). Survey data confirms that TFA participants do in fact draw common lessons about why system is failing and what ought to be done and that these lessons differ from the diagnoses and prescriptions of the profession at large (Ch. 5).
2. Mobilisation E. Agent-instigated change: <i>layering of innovations</i>	1. Agents exercise discretion to add new practices/rules/norms with a different institutional logic to existing ones 2. New logic gradually expands through differential growth, but does not supplant old practices/rules/norms 3. Diffusion of new practices/rules/norms weakens coherence of sub-system 4. New structures grow the coalition in favour of broader changes (positive feedback)	Hoop test passed Hoop test passed Hoop test passed Hoop test passed	- TFA alumni founded new charter networks and alternative teacher training programs that attracted philanthropic support and grew rapidly by servicing an ever larger constituency. (Ch. 5) - TFA corps and alumni have provided major human capital injection to charter and alternative certification sectors (Ch. 5) - These innovations have diminished coherence of the system; it is now more diverse and competitive (Ch. 5) - TFA innovations were invoked as 'proof points' for viability non-traditional approaches by policymakers instigating further liberalization of the sector (Ch. 5)

F. Agent-instigated change: <i>infiltration and conversion</i>	1. Agents progressively infiltrate decision making apparatus of traditional system 2. Agents use decision-making power to <i>convert</i> old structures to new ones, accelerating pace of change	Hoop test passed Hoop test passed	• TFA programming during 2000s explicitly focused on deepening policy impact of alumni. In 2003 an Office of Career and Civic Opportunities was started to disseminate career advice and advertise opportunities. Leaders for Educational Equity (a 501(c)4 dedicated to helping TFA alumni run for office or start policy advocacy groups) was founded in 2007. (Ch. 5) • TFA alumni surveys throughout the 2000s showed growing number of alumni reaching positions of influence as school leaders, district superintendents, school board members, and policy advisers to politicians, etc. (Ch. 5) • By 2010, several alumni had reached positions of executive power in major jurisdictions and were enacting reforms that impinged on core union interests (e.g. Michelle Rhee in D.C.; Michael Johnston in Colorado; various TFA alums in Louisiana) (Ch. 5)
3. Backlash G. Incumbent Recognition and Reprisal	1. Incumbent groups eventually recognize organization and agents as a threat to their interests 2. Incumbent groups that were previously tolerant of or oblivious to the subversive organization now manifest much more hostility towards it 3. Incumbents try to reverse subversive innovations 4. Incumbents try to wrest decision-making power from subversive agents	Hoop test passed Hoop test passed Hoop test passed Hoop test passed	• Contemporaneous press coverage records union anger at perception that TFA teachers were taking career educators' jobs in several major urban districts (e.g. Chicago) (Ch. 6) • TFA attracted dramatically increased volume of press coverage from around 2008 onwards and tone of the coverage became decidedly more negative from around 2010 onwards as it became clear that TFA alumni were leading contentious reform efforts in several major districts (e.g. Washington D.C., New Orleans, Newark) and states (Tennessee, Colorado) (Ch. 6) • Contemporaneous press coverage identifies the central role of TFA alumni in the establishment and implementation of Obama administration's highly contentious Race to the Top reforms. (Ch. 6). • Local unions opposed TFA expansions to Minneapolis in 2009 and Seattle in 2011 citing, among other reasons, TFA's role in fomenting education reform (Ch. 6) • Union-backed campaigns in several major school districts (Seattle; San Francisco; Pittsburgh) have resulted in school districts cancelling contracts with TFA (Ch. 6)

	• Legislation before the California legislature would prevent TFA operating in any Californian public school. (Ch. 6) • Union-backed student groups have disseminated anti-TFA material on college campuses aiming to disrupt corps member recruitment. (Ch. 6) • TFA recruitment has declined since the highpoint of 2013. Internal TFA documents attribute decline in part to heightened public and on-campus critique (Mead et al., 2015). (Ch. 6) • Union-backed campaigns have succeeded in rolling back rigorous teacher evaluations and merit pay schemes in several states (Will, 2019) (Ch. 6). • In several jurisdictions unions have succeeded in passing laws that cap the growth of charter schools (Higgins, 2019). (Ch. 6). • Several Democratic party presidential candidates have endorsed union campaigns to end federal subsidies for charter schools (Meckler, 2019). (Ch. 6).
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The story of TFA at once shows the potential and the limitations of a subversive approach to change. The obliqueness of the organisation's initial ambitions and its apparently modest capacities enabled TFA to gain a foothold in a system that has typically resisted disruptors and disruption. On the neglected peripheries, TFA corps members and alumni developed innovative models of schooling and new approaches to personnel recruitment. Over time, these TFA-spawned organisations and approaches – KIPP, the New Teacher Project, New Leaders for New Schools and so on – caught the attention of patrons and policymakers. 'Simply by providing visions of what is possible and proof points that analysts and reformers can use in the course of public debate' argues Hess, these innovations had an 'enormous impact' (2006, p. 259). But as TFA emerged as a major driver of the reform movement, the obscurity and apparent benignity that underwrote the organisation's initial entrée into the system evaporated. While the likes of KIPP and the New Teacher Project have grown prolifically in recent years, they have not supplanted the traditional system, and they are not invulnerable to retrenchment if teachers' unions continue to regain influence over Democratic party policymaking at all levels of government.

To date, TFA alumni have had considerable success as entrepreneurs and innovators operating alongside of the traditional district-administered system. As 'intrapreneurs' working to change districts from within, the record of TFA alumni is more mixed. In New Orleans, where an existential shock demolished the traditional power structures, a network of reformers centred on TFA has been able to supplant almost entirely the traditional system that prevailed prior to Hurricane Katrina. In Washington DC, more than a decade of TFA-led reform has produced similarly profound structural change. Today, almost half of all DC schools are charters, all teachers are subject to rigorous

performance evaluations, and teacher compensation is in part a function of demonstrated gains in student learning. Reforms led by teams of TFA alumni in Newark and Tennessee have also left their mark.

But with the exception of these few jurisdictions, the reform movement has not been able to move beyond *competition* to actually *displace* the incumbent regime. Charter schools still make up a small proportion of all schools nationally, traditional education schools still train a majority of teachers, and unions have remained a powerful (and indeed, resurgent) influence in K-12 education policymaking.

In sum, TFA has not transformed the overall structure of American education, but it has been instrumental in injecting variety and contestability into the system where previously there was little. A beachhead has been established from which further challenge and expansion is possible. For students of American education politics – and of institutional change more generally – Teach for America matters because it shows the sorts of organisational forms and long-run strategies that are required to challenge and compete with an entrenched regime.

Extensions and Limitations

Beyond a thorough empirical inquiry of the evolution and impact of Teach for America, this thesis has endeavoured to elaborate the concept of subversion as a mode of institutional change. Having demonstrated the concept's utility in understanding recent developments in the American education system, it remains to consider how far this concept might travel and to identify directions for further theoretical inquiry. What lessons can we glean about how subversive change works and what questions remain

unanswered? How does the TFA case resemble other instances of change in the teeth of incumbent opposition? What follows is a set of general insights about how change may be won in entrenched systems that emerge – or are at least hinted at – by the TFA case and are corroborated by other cases from diverse contexts and institutional settings.

Discretionary agent behaviour as a driver of change

The fact that agents exercise discretion when executing principals' directions is hardly a novel insight. Rational choice economists and scholars of public administration have long recognised the capacity of agents to frustrate top-down directives, be it through inadvertent deviations from intended outcomes or deliberate recalcitrance. But principal-agent problems tend to be framed from the perspective of thwarted principals undone by self-interested agents. The concept of subversion advanced in this thesis turns the conventional framing on its head and focusses instead on the opportunities that programmatically-motivated agents have to instigate change from the bottom up. Pro-change agents benefit from the very same information asymmetries and degrees of discretion that permit change-resistant agents to denude top-down reforms. The imperfect oversight that enables an agent to disregard or neuter principals' directives also affords agents with different preferences the opportunity to innovate and experiment. Over time, coordinated, deliberate agent action of this sort can alter structures and systems in consequential ways.

In the case of Teach for America, reform-minded corps members and alumni were not so much disobeying their distant principals, as defying the culture and expectations of their fellow agents, who, through their unions, wielded considerable power over the structure of the system. Whereas the teachers' unions are broadly opposed to charter

schools, test-based accountability, merit pay and erosions to teacher tenure, TFA alumni have championed substantially abetted the propagation of all of these things throughout the American education system. Whereas teacher educators rail against alternative certification, TFA has been a key driver of the current trend away from university-based teacher training. In sum, TFA corps and alumni have exploited the fact that just as principals have limited oversight and contend with information asymmetries, so to do other players in the system – even very powerful ones like the teachers’ unions. Using their discretionary agency, many TFA-ers over the years have taken direct action to alter the educational practices and structures within their purview. This capacity to take discretionary action from inside the system distinguishes the subversive agent as a special category of interest group.⁶⁴ While interest groups typically attempt to wring change from without – by lobbying policymakers, appealing to public opinion, and engaging in electoral activities, the subversive seeks instead to infiltrate the system and remake it from within.

The discretionary agency that underpins subversive action has obvious links to recent scholarship by Rosemary O’Leary on ‘guerrilla government.’ ‘Guerrillas’ are ‘public servants who disobey the wishes of their superiors – either directly or indirectly communicated – in order to do what they perceive is “the right thing”’ (O’Leary, 2019,

⁶⁴ Dur and Mateo (2016), follow many other scholars in drawing a distinction between ‘insider’ and ‘outsider’ interest groups on the basis of the different logics of action they typically employ. Insiders – most commonly business groups – tend to enjoy better access to bureaucrats and executive institutions and are likely to prevail on issues of low public salience – akin to Culpepper’s (2010) notion of ‘quiet politics’. Outsider groups tend to enjoy good access to legislators and typically prevail when their public campaigns and mass mobilization efforts succeed in making an issue highly salient with the broader public. Yet neither of these classifications captures the behavior of subversive entities like Teach for America. Rather than seeking access to decisionmakers in order to influence their deliberations, TFA seeks to *supplant* the front-line agents that shape institutional outcomes through their daily discretionary actions. Given this, it is reasonable to describe subversives as special category of interest group distinguished by their distinctive logic of action.

p. 1). O’Leary’s most recent monograph offers a catalogue of instances where the discretionary actions of civil servants in defiance of their principals has meaningfully changed policies and/or the outcomes these policies produce. These studies are an important corrective to path dependency models that accord a very limited role to individual agency outside of ‘critical junctures’. As Teles notes, ‘at any one time, the constraints of an existing regime can seem crushing and inescapable,’ but ‘the constraints and structures of any particular period are, however, often the creation of a previous generation’s political agents.’ ‘In the short term politics is, in fact, a world of constraints, but to agents willing to wait for effects that may not emerge for decades, the world is rich with opportunity’ (Teles, 2008, pp. 280–281)

Uncontested niches: footholds for subversives

Subversives gain entry to entrenched systems by satisfying a need that incumbents are unable or disinclined to serve. In the case of TFA, the need was teachers for chronically short-staffed urban and rural schools. The teachers’ unions recognised the need, but had not resolved a way to address it. In the case of Tulia Falletti’s (2009) *sanitaristas* the need was medical care for poor rural Brazilians. The military junta recognised the utility of providing healthcare to the potentially querulous masses and so was content to see it delivered. In the case of the Federalist Society, a forum for debating conservative jurisprudence at elite law schools was the unmet need. A mere debating club posed no obvious threat to the dominant liberal regime and so the Federalist Society was afforded space and time to organise. In all of these cases the organisation of agents in the service of recognised needs had profound repercussions in the long term that were not anticipated by incumbents (and perhaps not even by the subversive actors themselves initially).

These examples suggest that subversive infiltration can be pursued by both left- and right-wing groups alike, with or without significant financial resources. While TFA and the Federalist Society benefited considerably from the patronage of ideologically motivated philanthropists, the *sanitaristas* – a network of leftist medical professionals – were not financed by any outside groups wielding significant structural or economic power. The *sanitaristas* primary resources were their networks – which facilitated the rapid exchange of knowledge and among likeminded actors – and their positions – the fact that as frontline practitioners they had the latitude and discretion to directly implement new approaches to healthcare delivery. Over decades, these innovations in practice diffused throughout the country and came to constitute a shadow healthcare system that, with the fall of the military regime and the transition to democracy, could be adopted readily as official policy (Falletti, 2009). The case of the *sanitaristas* shows that while financial support from powerful outside groups is very likely an advantage to subversive actors, it is not always a necessary condition for success.

Alex Hertel Fernandez' recent analysis of the 'capture' of state legislatures in the United States by the American Legislative Exchange Council (ALEC) offers corroborating evidence that the identification of unmet needs is crucial point of leverage for challenger groups hoping to disrupt the status quo. Across the United States, many state legislatures are run without professional legislators or staffs. Recognising that many state lawmakers lack the necessary resources to develop bills on their own, ALEC has organised to satisfy this need and in so doing fundamentally altered the pattern of state-level lawmaking in America. Under ALEC's aegis, legislators and private sector sponsors collaborate on model bills that members may customize and introduce for debate into their respective state legislatures. Nearly one third of all state legislators are members of ALEC and

around 200 of the organisation's model bills become law every year (Hertel-Fernandez, 2019).

ALEC is funded by corporations, think tanks, and trade groups. It is registered with the Internal Revenue Service as a non-profit organisation that provides a public service and not as a lobbying group that seeks to influence. Corporations 'sponsor' ALEC in exchange for input into the positions and policies it advances. Membership of ALEC is open to 'persons dedicated to the preservation of individual liberty, basic American values and institutions, productive free enterprise, and limited representative government, who support the purposes of ALEC, and who serve, or formerly serve, as members of a state or territorial legislature, the United States Congress, or similar bodies outside the United States' (ProPublica, 2019). For a membership fee of \$50 a year, ALEC provides legislators with the resources they lack – research assistance, model legislation, and access to an extensive network of likeminded individuals (Hertel-Fernandez, 2019). In short, ALEC exerts influence by organising and massaging the preferences and actions of agents embedded within key policymaking systems.

Until recently, ALEC's practices were little known outside of conservative political circles, despite nearly three decades of activity. 'For years, political types had vague notions of the state-to-state connections,' reported *The Atlantic*, 'but it was difficult to see the whole picture' (Scola, 2012). Membership of the organisation was secret and until 2013 access to model bills was restricted to members only. In July 2011, the Centre for Media and Democracy gained access to 850 of ALEC's model bills, created over a 30 year period and in concert with the *The Nation* created a website, *ALEC Exposed*, to host these model bills. Using text analysis software journalists and activists were then able to discover how

widely ALEC's model bills had been adopted by state legislatures. In particular, ALEC's propagation of 'stand-your-ground' gun laws garnered heavy media coverage after the shooting of Trayvon Martin in February 2012 (Hertel-Fernandez, 2019). In the wake of these revelations progressive groups mounted a campaign to pressure corporate backers to sever their ties with ALEC. More than sixty companies and foundations, including Kraft Foods, McDonald's, Amazon, Apple, and the Bill and Melinda Gates Foundation, dropped their memberships and thirty-four legislative members left ALEC (Abowd, 2014; Overby, 2012).

The cases of ALEC and Teach for America have several obvious parallels. Both organisations gained access to and influence over public policy systems by organising to address an unmet need. From this initial vantage point, both groups have been able to prosecute a broader agenda of change through the discretionary action of embedded agents. Both had strong support from corporate and philanthropic patrons with clear political objectives. Both ventures to some extent developed as counterweights to public sector union influence over state policymaking. Both also benefited from an ability to 'shop' multiple venues – if progress was frustrated in one jurisdiction it was not fatal to the overall enterprise. A multiplicity of venues enable TFA and ALEC to pick winnable battles and fall back to safe havens. Moreover, because activity was spread across a disparate set of venues, the overall impact of TFA and ALEC was difficult to adduce until it was already well advanced. Both organizations benefited initially from a low profile and the fact that rival groups had a limited understanding of their capacities. As one union organiser said of ALEC 'they made a sound strategic decision to prioritize activity at the state level and they beat us to the punch. They were smarter than we were' (Vogel, 2014). Finally, after belated exposure of their activities and impact, both ALEC and TFA

have been subject to significant backlashes and attempts by rival groups to curtail their influence.

The cases diverge in as much as ALEC was operating in a less entrenched institutional setting. While public sector unions have long been a powerful force in many states, there are very few states where liberal policymakers exercise anything approaching hegemony. Consequently, the major constraint on ALEC's actions was not so much the threat of liberal reprisals, as the prospect of public opprobrium if it emerged that a corporate consortium was exercising undue influence over democratic policymaking. It was this factor that dictated ALEC's secretive, *subversive* approach. TFA, by contrast, has been contending with a more entrenched regime and while it has advanced a coherent reform agenda, TFA has operated in a less partisan, less explicitly ideological fashion than ALEC. Consequently, in its 30 years of operation TFA has made less headway than ALEC.

The limitations of incumbent oversight

Successful subversion exploits the limited capacity of incumbents to monitor the activities of other groups and to anticipate their true intentions and capacities. While institutional incumbents enjoy many advantages over would-be challengers, they must contend with the problem of asymmetric information. Would-be challengers know the preferences of incumbents because the institutional status quo substantially reflects them. Subversives can readily anticipate that direct assaults on incumbent control will be met with reprisals and can adjust their strategy accordingly – for instance, by presenting a benign outward image, keeping a low profile, operating in secret, working on the poorly surveilled margins of the system, or taking an accretive long-term approach to change. Incumbents by contrast, have limited information about the preferences and capacities of other groups, especially in circumstances where it is rational for would-be challengers to disguise or soft-

pedal their true preferences for regime change. Thus, models of institutional change that assume full information are liable to over-estimate the power of incumbents to maintain the status quo.

A recent study by Daniel Treisman suggests that this problem of asymmetric information and the incumbent missteps that arise from it, may even be a leading trigger of democratisation. While influential theories of democratisation hold that incumbents deliberately choose to share or surrender power, Treisman contends that ‘in about two thirds [of democratisations since 1800], democratisation occurred not because incumbent elites chose it but because, in trying to prevent it they made mistakes that weakened their hold on power’ (2017, p. 1). Treisman identifies that the mistakes of incumbents can take two main forms. In mistakes of *information* an incumbent ‘has incorrect beliefs about players’ payoffs, the probabilities, or the timeline of the game.’ An incumbents’ decision-making may be ‘perfect in itself...but this reasoning is based on faulty information.’ Mistakes of *calculation* arise when ‘despite accurately assessing payoffs, probabilities, and timelines, the actor solves the game incorrectly’ (2017, pp. 8–9). In other words, the information was good, but a sub-optimal decision was nevertheless made.

Treisman’s analysis finds that many incumbents fall victim to hubris – they underestimate the strength of their opposition and as a result fail to pre-empt a revolt with concessions and/or repressions, or they call an election or referendum and suffer a costly defeat. He cites Nicolae Ceaucescu (Romania 1989) and Baby Doc Duvalier (Haiti, 1990) as examples of the former, and Poland’s Communists (1989) and Nicaragua’s Sandinistas (1990) as examples of the latter. Incumbents are also liable to topple through: military misadventure – by starting a war hoping to rally the public, but losing the war and with

it political control (e.g. Galtieri, Argentina, 1982); by initiating partial reforms, thinking this will stabilize the regime, but find themselves unable to stop making concessions (e.g. Gorbachev, USSR); by trusting a traitor – selecting a leader it thinks will defend the regime but who undermines it (Adolfo Suarez, Spain; B.J. Habibie, Indonesia); and by counterproductive violence – engaging in repression that inflames protest, splits the elite or otherwise fractures the regime (Ershad, Bangladesh, 1990). These mistakes reflect well-known cognitive biases and the fact the reliable information about the strength of opposition groups can be hard to come by in dictatorships because of powerful incentives for preference falsification (Kuran, 1989; Treisman, 2017).

By foregrounding incumbent information and calculation as key variables in institutional competition, we can also identify conditions in which attempts at subversion are liable to fail. In its initial stages, subversion relies on an incumbent having insufficient information or sufficiently misinterpreting information so as not to recognise the subversive entity as a threat worthy of repression. It therefore follows that subversion fails when the subversive's disruptive agenda is detected before it manages to infiltrate the target institution or regime; before it can instigate consequential changes; or before it is strong enough to withstand reprisals. A recent episode in Australian higher education provides a case study in failed subversion.

In 2017 the Ramsay Foundation – funded by the bequest of a late, conservative, childless, healthcare billionaire – announced its intention to fund Western civilisation programs based around reading 'the great books' at three of Australia's leading universities. A board, including two conservative former Prime Ministers, was formed to direct the dispensation of the money. Teaching and research of the humanities has long been

underfunded at Australian universities, so it was unsurprising that several institutions expressed interest in Ramsay's millions. At the same time, there were sensitivities about accepting benefaction from a conservative foundation which, some academics and students feared, could be a vehicle for Western triumphalism and 'a rhetorical tool to continue the racist prioritisation of Western history over other cultures.' University administrators and academic union representatives worried that Ramsay's efforts to micromanage the gift 'would violate the core principles of academic freedom, integrity and independence' (Manne, 2018).

At a delicate juncture in negotiations with the Australian National University, former Prime Minister, Tony Abbott – a founding board member of the Ramsay foundation – made an ill-fated public intervention that ultimately jettisoned the entire enterprise. Writing in the conservative magazine *Quadrant*, Abbott argued that the Ramsay project was not 'merely *about* Western civilisation but *in favour* of it.' The Ramsay effort was a response to a profound dissatisfaction with the fate of humanities in Australian universities. 'The fact that respect for our heritage has largely been absent for at least a generation in our premier teaching and academic institutions makes the Ramsay Centre not just timely but necessary' wrote Abbott. He went on to stipulate that Ramsay was, *of course*, a right-wing endeavour, citing "O'Sullivan's law" ...namely that 'every organisation that's not explicitly right-wing, over time becomes left-wing'. Consequently, 'a management committee including the Ramsay CEO and also its academic director will make staffing and curriculum decisions.' To Abbott, the ultimate objective of the Ramsay mission was not so much *educational* as *political*. He could envisage a day when a hundreds of Ramsay scholars would form a right-minded cadre, pushing back against the hegemony of the left in Australia's universities: '[differences] could be made by small numbers of

committed and capable people...Person by person, the world does change. A much more invigorating long march through the institutions may be about to begin!’ (Abbott, 2018).

With Abbott’s intervention, Ramsay’s opponents no longer had to *prove* that it was a right-wing trojan horse. A member of the Ramsay board had declared it so. The *Quadrant* article gave the game away before it had even properly begun. Shortly after the article was published, negotiations with the ANU were abandoned. Attempts to strike a deal with the University of Sydney and the University of Queensland have been unsuccessful to date, as senior administrators have proven unwilling to override the objections of faculty and students to a ‘supremacist’ centre (Measham, 2018). Had Abbott kept his mouth shut the outcome may very well have been different. As it stands, his declaration of the venture’s explicitly disruptive intent ceded one of the few advantages that subversive actors have over incumbents – namely that of asymmetric information.

Contrast the fate of the Ramsay Centre with that of the Federalist Society. The Ramsay Centre aspired to the same objective that the Federalist Society has substantially realised – namely to overthrow liberal hegemony in its respective field. Like the Federalist Society, the Ramsay scheme endeavoured to approach this goal through indirect, accretive means – by capturing the hearts and minds of young people in prestigious universities who would, it was hoped, go on to occupy powerful positions in politics and academe. But there the similarities end. Whereas the Federalist Society, under the guise of a modest debating society, germinated a potent conservative network at the heart of the American legal system, Abbott’s guileless declaration of the Ramsay Foundation’s disruptive intentions engendered sufficient alarm among university gatekeepers that entry was denied outright. Whereas the founders of the Federalist Society successfully seeded a

‘wildflower in the weeds of academic liberalism’ - one that ultimately grew into ‘an oak,’ (Scalia quoted in Kruse, 2018), the Ramsay effort was quickly nipped in the bud by incumbents suitably leery of an attempted right-wing insurgency. These two episodes underscore the importance of discipline and sensitivity for would-be subversives and the fact that infiltrating hostile institutions is never easy.

Venue shopping and subversion

The case of TFA, along with others canvassed above, suggests that large, devolved systems are especially amenable to subversion because they afford a multitude of venues for both infiltration and innovation. For instance, TFA’s infiltration of the American education system closely mirrors Falleti’s account of the *sanitarista*’s infiltration and ultimate overhaul of the Brazilian health care system. The federal structure of Brazilian government was highly amenable to subversive action because between local, state, and national agencies, there were myriad entry points, and many opportunities for *sanitaristas* to work their way upwards and inwards towards the institutional centre and towards positions of influence over policy (Falleti, 2009). The *sanitaristas* could thus pursue a bottom-up strategy which capitalised on the relative permeability of positions at the local level. The Federalist Society has also benefited from this dynamic – among America’s many law schools, it was relatively straightforward to identify a handful that were amenable to the establishment of a conservative debating club. Furthermore, large devolved systems provide a multitude of potential ‘venues’ in which subversive innovations or ‘layering’ can take root. The American Legislative Exchange Council has benefited significantly from this dynamic. As one of ALEC’s early executive directors stressed to potential members, ‘in the states, if you’re trying to get [something] passed and you’ve lost in Kansas, Nebraska and Texas, it’s not a total failure. You may well win in Arizona, California, and New York that year.

You've got fifty shots' (Hertel-Fernandez, 2019, p. 12). Finally, and relatedly, a sprawling decentralised system is difficult for incumbents or rivals to subvert to surveil. Changes unfolding at a local level, on the peripheries of the system are less likely to be noticed by those at the apex of the system and the cumulative significance of disparate developments is hard to perceive. Both the *sanitaristas* and TFA developed small-scale and apparently disparate experiments on the margins, the ultimate significance of which only became apparent much later, after they had substantially diffused throughout the system. Similarly, by focussing their efforts at the level of state – rather than national – governments, ALEC very deliberately sought out 'quieter,' more peripheral, less scrutinized venues in which to advance their agenda. As Hertel-Fernandez notes, in 2016 some 40 percent of Americans reported that they could not recall the party in control of either chamber of their state legislature. Moreover, even entities attuned to policymaking in a given state will generally struggle to keep abreast of developments elsewhere. By the time public sector unions, liberal interest groups, and the media pieced together ALEC's influence nationally, it had been shaping the behaviour of America's various state houses for decades. Further research would do well to compare systematically the fate of subversive actors in federal/devolved settings as against more centralised/unitary ones.

A thorough investigation of the international diffusion of the Teach for America model, which now operates in 53 very different countries, may shed some light on this question, though it is important to note that the TFA model has not diffused as a strictly *subversive* entity. Unlike Teach for America, Teach for All's constituent programs have been designated as leadership pipelines and nurseries of change-agents *from the outset*. Nevertheless, as elaborated below, a cursory analysis suggests that the TFA model is more likely to take root in federal countries where K-12 government is substantially

devolved to sub-national authorities, giving succour to the idea that more venues enhance the chances of challenger organisations finding a foothold from which to project influence. Or rather, as Baumgartner and Jones argue, ‘the very existence of multiple venues means that cracks are likely to appear somewhere, and these can be exploited by political activists’ whether they employ a subversive strategy or not (1993, p. 234).

TFA Goes Global: Teach for All and the new frontier

As Teach for America has wrestled with a growing backlash, the TFA model has diffused internationally, across an intriguingly diverse range of countries. Today 53 ‘Teach for’ organisations are corralled under the ‘umbrella’ of Teach for All (TFAll), an entity established in 2007 by Wendy Kopp with Brett Wigdortz the founder of Teach First (the UK equivalent of TFA launched in 2002). TFAll provides resources and support to member organisations and cultivates connections between them (Straubhaar & Friedrich, 2015). Like TFA, Teach For All’s constituent organisations aim to ameliorate within-country educational inequalities by recruiting high-achieving graduates, who are then trained rapidly and intensively while they complete a minimum two-year teaching commitment in a disadvantaged school. Similarly, just as Teach for America today identifies primarily as a pipeline of education sector change-makers, Teach for All also positions itself first and foremost as a developer of “collective leadership” for educational change on a national scale and has done since its founding (Kwauk et al., 2016; Teach for All, 2019). Hence while TFAll cannot be considered a subversive entity, studying its spread and varying impacts in different settings, may shed light on the institutional dynamics that impede and abet challenger organisations more generally. Moreover, evidence that TFAll organisations are generating similar changes to their respective national education systems as Teach for America has wrought in the United States,

suggests that TFA’s distinctive approach to selection, training, and networking is replicable cross-nationally.

Explaining the spread of the ‘Teach For model’

Since the launch of the Teach for All network at the 2007 meeting of the Clinton Global Initiative, the TFAll model has been adopted in countries as diverse as Sweden, Bangladesh, Lebanon, Liberia, and Argentina. Figures 10 and 11, below, show the rapid growth of the TFAll network over time and the geographic distribution of member organisations. In 2016 Kopp told Brookings Institution researchers that she foresees Teach for All reaching over 100 countries in the not too distant future (Kwauk et al., 2016). While it is beyond the scope of this thesis to provide an exhaustive analysis of TFAll’s global diffusion, a cursory analysis offers some clues about the institutional dynamics that help and hinder these ‘jurisdictional challengers’ to infiltrate and exert influence.

Figure 10: Growth of Teach for All Member Organisations, 2007-2019

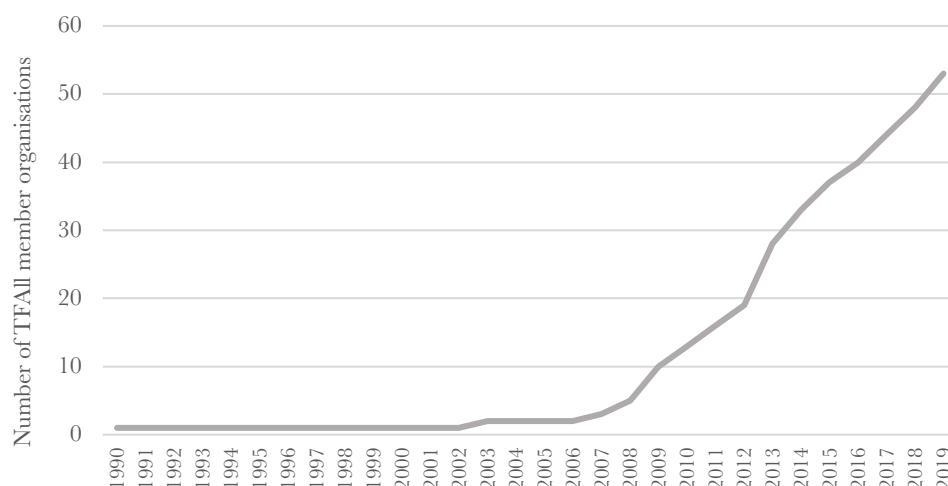


Figure 11: Geographic Distribution of TFAI Organisations in 2019



To begin with, it appears that TFAI programs are indeed more common in federal countries than unitary ones. A bivariate logit regression finds a statistically significant relationship between countries with TFAI organisations and federations, suggesting that federal nations are 21% more likely to have a TFAI program than unitary ones. Of course further analysis controlling for other pertinent variables must be conducted before firm conclusions can be drawn (see Appendix B for a brief discussion of variables, data collection and analysis).

Table 13: Effect of Federalism on Probability of Having a Teach for All Organisation

	Coefficient	95% Confidence intervals
Federation	1.2103** (0.437) [2.77]	(0.353, 2.068)
Constant	-1.290*** (0.176) [-7.32]	(-1.637, -0.945)

Observations 215
LR chi2(1) 7.34
Prob > chi-2 0.007

Note: Robust standard errors in parentheses; z-statistics in square brackets; ***p<0.001, **p<0.01, *p<0.05

On the other hand, the distribution of TFA would appear to defy prevailing theories of policy diffusion that anticipate transfer among countries that are geographically proximate (Berry & Berry, 1999; Stone, 2004); politically and culturally kindred (D. Dolowitz, Greenwold, & Marsh, 1999; D. P. Dolowitz & Marsh, 2000; David Dolowitz & Marsh, 1996); and with similar financial and administrative capacities (Rose, 1991, 1993). TFAll's current member organisations are spread across six continents, encompassing the developed and developing world, operating within a wide variety of welfare and skill production regimes, within radically different cultural settings and education systems, and with the assistance of governments across the political spectrum. It is hard to conceive of countries more different than Sweden and Ghana, or Germany and Nepal, and yet the TFAll model has been adopted in each (Straubhaar & Friedrich, 2015).

Similarly, the relationship between TFAll diffusion and the power of vested interests is somewhat ambiguous and merits further investigation. Given the documented relationship between the relative strength of veto players and the diffusion of state-level education reforms in the United States (Finger, 2018; Mintrom, 1997), we ought to expect a similar pattern in the diffusion of TFAll programs internationally. Yet the presence of strong teachers' unions does not seem preclude the introduction of a Teach for All program. Several countries with strong corporatist traditions and large, influential teachers' unions, such as Sweden, Denmark, Germany, France, Austria, and Belgium have adopted the model (Dobbins, 2016; Wiborg, 2016b). Likewise, Teach for Mexico and Teach for India have been in operation since 2013 and 2009 respectively, despite powerful teachers unions in both countries (Béteille, Kingdon, & Muzammil, 2016; Chambers-Ju & Finger, 2016). Evidence from Latin America, does however suggest that

teachers' unions have diminished the potential scope and size of Teach for All programs in that region. In Chile, Peru, and Colombia, teachers unions have resisted the introduction of TFAll in public schools. TFAll teachers instead work in voucher, religious, or concession schools. In Brazil, where such private alternatives are scarce, the Rio de Janeiro municipal teachers' union blocked the assignment of TFAll teachers into regular classroom teaching positions, confining them to work as after school tutors (Bruns & Luque, 2015). The growth of Teach for Australia has likewise been hamstrung by the opposition of teachers' unions to the relaxation of teacher certification requirements in New South Wales and Queensland (Potts-Rosevear, *Interview*, 2019; Weldon, McKenzie, Kleinhenz, & Reid, 2013). Consequently, Teach for Australia has no presence in two out of three of the country's most populous states. In any case, even if strong unions do not preclude the introduction of a TFAll program outright, we might expect that its long-run impact will be more modest where vested interests are stronger and better equipped to quash change. Future research would do well to investigate this hypothesis.

Finally, given that TFAll responds to expressed demand from in-country entrepreneurs to set up member organisations, rather than directing the expansion of the network from the centre, it is important to consider the role of individual-level variables as well as structural factors in TFAll's spread (Kwauk et al., 2016). Descriptive data about the founders of TFAll organisations suggests that elite networks of internationally mobile, highly educated individuals also play a role in the model's global propagation. Using biographical information about the founders of TFAll member organisations from the TFAll website and LinkedIn profiles where available, I derived descriptive statistics about the educational and professional backgrounds of the 55 founders of the 53 Teach for All

network organisations.⁶⁵ My analysis finds a significant majority of founders (71%) hold at least one degree from a US or UK university, with many having attended world renowned institutions (See Appendix B for a more detailed analysis). A majority of founders have also had significant professional experiences outside of their native countries (56%), with the plurality having worked in the United States (33%). Public commentary from TFAI founders suggests that their international mobility and elite educations have been anything but incidental to the spread of TFAI. Several founders have stated that they first learned of Teach for America as students or professionals in the United States and that the impact of TFA inspired them to transplant the model to their home countries (Kwauk et al., 2016).

The impact of Teach for All

As many TFAI organisations are quite young (averaging 5.6 years old) it is too early to know whether they will, over time, have similarly consequential impacts on their respective national education systems as Teach for America has managed in the United States. The record of Teach First, the oldest of the TFAI programs outside the US is, however, suggestive. Teach First was founded by Brett Wigdortz, an American McKinsey consultant based in London, with strong support from the then New Labour government.⁶⁶ Since 2003, Teach First (TF) has trained and placed over 10,000 teachers

⁶⁵ Data was collected in November 2019

⁶⁶ Significantly, while some union leaders resented the establishment of Teach First, English and Welsh teachers' unions did not have the capacity to block its introduction, nor have they been able to impede significantly Teach First's rapid growth over the 16 years of its operation. Teachers' unions in the England and Wales are much weaker than in the United States and elsewhere, with a proportionally smaller membership divided across multiple organisations, none of which has national bargaining powers nor meaningful access to policy formulation (Wiborg, 2016a). In 2010, only 52.4 percent of the teaching workforce in England were union members. By 2018, membership had declined to 48.1 percent (Whittaker, 2018). In contrast to the United States, education governance in the UK is highly centralised at the national level, with far fewer veto players to overcome in passing reforms. Compensation scales are set nationally, while hiring decisions that are the preserve of school districts in the US, are made at the school level in England. Hence, with the support of successive Secretaries of Education and amenable school leaders, the growth of Teach First has never been seriously impeded by union activity or uncooperative local authorities.

in disadvantaged schools across England and Wales. In recent years, it has become apparent that TF alumni are having a notable ‘systemic’ impact, much as TFA alumni have in the United States.

The advent of Teach First has been singled out as a contributing factor to significant improvements in the performance of London schools since 2000 (Baars et al., 2014). Additionally, Teach First is largely credited for the fact that between 2003 and 2015, the number of state secondary school teachers with degrees from Oxford or Cambridge almost doubled, while the proportion of Oxbridge educated teachers in the independent sector remained stable (Kirby, 2015).⁶⁷ In recent years, TF alumni have featured prominently in positions of school and system leadership. A recent study finds that TF participants are more than seven times more likely to progress to senior school leadership roles in low-income schools early in their career, than a matched sample of teachers prepared through traditional university-based routes (Allen, Parameshwaran, & Nye, 2016). Many TF alumni have found their way into positions of considerable influence in the civil service and as special advisors to UK Secretaries of Education and Schools Ministers. Two are now members of the UK Parliament (Gayle, 2016; Whittaker & Camden, 2017). In a pattern that parallels developments in the United States, several

In his 2012 book about founding Teach First, Wigdortz also notes that the establishment of TF was ‘well timed’: ‘When we were getting started there was a lot going on in the education realm, with all sorts of initiatives being launched by a reforming government – academies, floor targets, new testing and other school requirements. As a result there were a number of areas of change that the unions were trying to influence that worried them more than Teach First’ (Wigdortz, 2012).

⁶⁷ Like Teach for America, Teach First’s intake of top graduates has made it a target for accusations of elitism, notwithstanding the diverse backgrounds of participants. Similarly, retention rates beyond the compulsory two years of teaching and the expense of the program relative to regular pathways, have met with criticism. Nonetheless, the organisation has received consistent financial and rhetorical support from Labour and Conservative governments, and retains the support of many schools that take Teach First participants year after year (Allen, 2016).

Teach First alumni have founded successful academies serving predominantly low income and minority communities (akin to charter schools) (McInerney, 2017b).

Teach First, like Teach for America, has also spawned a significant number of social entrepreneurs, whose organisations are influencing the education system in consequential ways. The Brilliant Club, for instance, enlists PhD researchers to share their academic expertise with schools in low-income areas of the UK. The program has grown rapidly and now reaches 1 in 10 UK schools (The Brilliant Club, 2019a).⁶⁸ Another example is Edapt, a subscription service founded in 2011 which provides legal support and employment protection to UK teachers. Edapt is now a fast growing, cheaper, alternative to union membership for teachers who want the security of legal representation in the event of a workplace dispute, but do not want to take part in industrial action or political lobbying (Edapt, 2019; McInerney, 2017a). Teach First has also directly inspired a late-career analogue, Now Teach, which recruits experienced, older individuals into the classroom, rather than young graduates.⁶⁹

The Teach First approach of rigorous recruitment and a hands-on apprenticeship model of training has also been translated to other policy domains by TF alumni. Frontline, which aims to recruit the ‘best and brightest’ into social work and provide on-the-job training, was founded in 2013. Think Ahead, founded in 2014 takes a similar approach, but focuses specifically on mental health social workers (Murray, 2018). Unlocked Grads,

⁶⁸ Analysis by the UK University and Colleges Admissions Service find that the Brilliant Club has a statistically significant impact on the likelihood of participating pupils progressing to a highly-selective university, compared with control groups. The model is currently being piloted in the United States and South Africa (The Brilliant Club, 2019b).

⁶⁹ Now Teach was founded by Teach First alumna Katie Waldegrave and former Financial Times journalist Lucy Kellaway, who cites her daughter’s experiences as a Teach First participant as the major inspiration for the organisation (Kellaway, 2019).

founded in 2016, aims to ‘flood the prison system’ with ‘smart superstars’ who will engage inmates in education (Murray, 2018; Unlocked, 2019). Finally, there is Police Now, which recruits and trains young graduates to become neighbourhood officers and detectives with metropolitan police forces throughout England and Wales. Though not the handiwork of TF alumni, the program’s founder declares that he ‘stole everything from Teach First,’ including marketing stressing the challenges of the job, a short but intensive training period before further on-the-job development, and the chance to move on to another profession after a few years of service (The Economist, 2015). Collectively, these TF spin-off organisations indicate that there is an appetite among high achieving young people to take on difficult and modestly paid work if it can be invested with the cachet of selectivity and conspicuous virtue. In 2015, *The Economist* enthused that ‘Teach First is spurring imitators that should improve the public sector.’ It is too early to know whether this prediction is correct, but Teach First’s analogues have certainly channelled academically outstanding and ethnically diverse individuals into professions that have not historically had a surfeit of either (The Economist, 2015).

It will be interesting to see whether other TFAll organisations operating in more inhospitable institutional settings will mirror the long-run effects of Teach First. Will Teach for Brazil, for instance, be able to generate similar impacts to TFA or Teach First in a context where teachers’ unions wield significant influence over the education system and the growth and scope of the TFAll model has been hampered by powerful vested interests from the very start? Are the systemic effects of TFAll organisations liable to be more muted in countries where the ordinary teacher workforce typically draws its ranks from higher up the distribution of educational attainment (i.e. Japan, Belgium, Germany, and Sweden (Hanushek, Piopiunik, & Wiederhold, 2019))? Systematically measuring

(much less explaining) variations in the longer-term impacts of TFAll organisations will doubtless be difficult. To date, impact analyses of the TFAll network are invariably piecemeal and lean heavily on examples and anecdotes. The multi-dimensionality of TFAll's effects and the absence of an obvious 'denominator' by which to calculate effect sizes throw up considerable challenges for future research. Nonetheless, the field of comparative education policy would benefit greatly from a deeper understanding of a phenomenon that has already shown itself to be a consequential driver of change in at least two national systems.

A Final Word

This thesis has shown that recent changes in the American public education system were generated not simply by liberalizing reforms that created or empowered *demand* for greater choice and competition in schooling provision, but by the individuals and organisations that created a *supply* of such things. By injecting the system with agents temperamentally inclined and deliberately primed to make the most of opportunities to do things differently, Teach for America has wrung change from a system not known for its dynamism. What is more, while the Teach for America case is important in its own right, it points to some broader truths about how change may be won in seemingly entrenched policy systems.

Institutions are the product of competition between coalitions of interests. While inherited structures and balances of power are, of course, major determinants of this competition, the 'losers' have more means of competing than path dependency or critical juncture models have perhaps allowed. As the foregoing examples show, consequential – albeit not revolutionary – political change can arise when entrepreneurial agents find

ways to infiltrate systems and use the discretion that their embedded position affords to alter the structures and practices around them. Subversion is nevertheless a highly contingent enterprise. First, it requires entrepreneurial agents with the acuity to recognise opportunities to infiltrate well-defended systems. There is good reason to believe that entrepreneurs with the foresight to perceive long-run opportunities and withstand the considerable risk of failure are relatively rare. Second, while subversive actors can take steps to mitigate the likelihood of incumbent reprisals – for instance, by outwardly soft-peddalling their preferences for change and gradually accreting influence, rather than mounting a full-frontal attack on the status quo – to a significant degree, their success depends on incumbents failing to recognise the incipient threat until it is too late. For once subversives are ‘exposed’ as disruptors, they must have the power resources necessary to withstand direct contestation with incumbents set on reversing their gains.

Appendix A: Conduct of Interviews

Much of the data relied upon in this thesis was collected through interviews conducted during fieldwork in various cities of the United States in August-September 2017. This appendix details the approach taken to recruiting and identifying interviewees, and conducting and transcribing interviews.⁷⁰

Constructing a Sample

As my research objective was to find probative evidence for specific processes, purposeful recruitment of interviewees was the most appropriate sampling method (Bleich & Pekkanen, 2013; Tansey, 2007). I began by identifying individuals who had held key positions with Teach for America throughout the organisation's existence. In many instances, key individuals were referred to in Kopp's various written accounts of the development of TFA. Others were identified and recruited through media reports, LinkedIn searches, and referrals by known informants, i.e. 'snowballing' (Tansey, 2007). Additionally, the views of expert observers of American education policy were solicited. This group of informants was selected on the basis of their record of pertinent scholarly research or public commentary. I also sought interviews with union leaders throughout TFA's existence as well as other outspoken critics of the organisation. These individuals were primarily identified through systematic searches of union division websites, media reports, as well as referrals by known informants. I also endeavoured to track down superintendents and other educational administrators who have worked extensively with TFA. These individuals were primarily identified through Kopp's written accounts of TFA's development and through referrals from other interviewees. Through referrals

⁷⁰ The approach and methods employed herein follow the recommendations of Bleich and Pekkanen (2013).

and published records I further identified some of TFA’s early and most important philanthropic supporters.

Inevitably, not all of the key protagonists involved in the development of TFA were available for interview. In some instances, individuals are deceased; in other cases, despite best efforts, I was unable to find contact details for individuals, or my inquiries went unanswered. I was unable to secure interviews with school district administrators and school principals who engaged with the TFA program in the early 1990s. Similarly, first-hand accounts from the very early philanthropic and corporate sponsors, and from union officials who engaged with the program in the early ‘90s have proved elusive. These perspectives do not go unrepresented, however. Statements from TFA’s founding corporate and philanthropic patrons, union officials, school principals, and district superintendents have been diligently sourced from contemporary news coverage, published correspondence, documents produced by TFA, and earlier books and articles by other researchers. Table 13 below provides further information on the composition of the interview sample.

Table 14: Catalogue of Interviewees					
Interviewee	Position	Date	Location	Format	Length
<i>TFA Staff Past and Present</i>					
Biber, Josh	TFA Corps member; TFA’s Founding Executive Director, Massachusetts, 2008-Present	Conducted 12pm, 29/08/2017	Boston, MA	Face to face	61 mins
Hauser, Jerry	TFA teacher early ‘90s; Chief Operating Officer 1998-2005	Conducted 12pm 25/09/2017	Washington DC	Face to face	57 mins
Healy, Monica	Head of Government Relations, 2001-2006	Conducted 2pm 25/09/2017	Washington DC	Face to face	51 mins

Huffman, Kevin	TFA teacher early 90s; Executive VP 2000-2011	Conducted 02/10/2017	Washington DC	Skype	64 mins
Knowles, Timothy	Inaugural NYC Region Director, early 1990s	Conducted via email correspondence 26/06/2017	Chicago, IL (email)	Email	N/A
Kopp, Wendy	Founder and CEO of TFA 1989-2013	Conducted 2pm 17/08/2017	New York, NY	Face to face	56 mins
Kramer, Matt	Co-CEO of TFA, 2013-2015; senior staffer since 2005	Conducted 5pm GMT 3/08/2017	Minneapolis St Paul, MN	Skype	46 mins
Kramer II, Matt	Co-CEO of TFA, 2013-2015; senior staffer since 2005	Second interview regarding TFA expansion to MN conducted 18/11/2017	Minneapolis St Paul, MN	Skype	51 mins
Mandel, Andrew	Various senior roles at TFA 2002-2018; Heavily involved in leadership framework and alumni development	Conducted 9am 06/09/2017	New York, NY	Skype	54 mins
McGoldrick, Lee	VP Growth Strategy, 2001-?; Currently VP for Legislative, Regulatory and Policy Analysis	Conducted 5pm 01/08/2017	Albany, NY	Telephone Call	56 mins
McLaughlin, Michelle	Staffer for American Federation of Teachers 2000-07; TFA Director of State and Federal Policy 2008-2010	Conducted 11am 29/09/2017	Washington DC	Skype	46 mins
Meyers, Mandara	VP of Leaders for Educational Equity (TFA's 501(c)4)	Conducted 8.30am 18/09/2017	San Francisco, CA	Telephone l	41 mins
Oscar, Daniel	Various positions at TFA, 1989-2006	Conducted 2pm 20/08/2017	Princeton, NJ	Face to face	54 mins
Scroggins, Eric	TFA teacher, then senior staffer responsible for growth; 2003-2015	Conducted 11am 17/08/17	San Francisco, CA (Skype/call)	Skype	51 mins
Sellers, Daniel	Founding ED of TFA Minnesota 2009-2011; Now heads 50CAN Minnesota	Conducted 9.30am 8/12/2017	Minneapolis St Paul, MN (Skype)	Skype	49 mins
Short, Susan	Director of Placement, 1989-90;	Conducted 8.30am 20/09/2017	Providence, RI	Telephone Call	52 mins
Smith, Kim	Various positions at TFA, 1989-1991; now major venture philanthropist	Conducted 1pm 5/09/2017	San Francisco, CA	Google hangout	53 mins
Tilson, Whitney	Founding employee of TFA, 1989-91; Founder and major funder of	Conducted 11.30am 15/09/2017	New York, NY	Telephone l	49 mins

	Democrats for Education Reform				
<i>Scholars, journalists, and think-tankers</i>					
Brewer, T Jameson	Ass. Prof. Education, University of North Georgia; Former TFA corps member in mid-00s now prominent academic critic of TFA	Conducted 8am 30/08/2017	Dahlonaga, GA	Skype	~45 mins
Cohen, David K	Professor of Education, Harvard University and University of Michigan	Conducted 2.30pm, 28/08/2017	Cambridge, MA	Face to face	48 mins
Finger, Leslie	Harvard-based scholar of American education politics (especially role of unions)	Conducted 2pm 25/08/2017	Cambridge, MA	Face to face	88 mins
Hess, Rick	Director of Education Policy, American Enterprise Institute	Conducted 2.30pm 28/09/2017	Washington DC	Face to face	78 mins
Kahlenberg, Richard	Century Foundation Senior Fellow; Long-time observer of education politics in America; Historian of American teacher unions (biographer of Al Shanker)	Conducted 4pm 27/09/2017	Washington DC	Face to face	52 mins
McGuinn, Patrick	Ass. Prof. Political Science, Drew University, N.J. Published extensively on contemporary education politics	Conducted 10am 22/08/2017	Madison, NJ	Telephone	35 mins
Mead, Sara	Partner at Bellwether Education; authored major commissioned report on TFA's growth	Conducted 12.00 25/09/2017	Washington DC	Face to face	43 mins
Moe, Terry	Professor of Political Science, Stanford University	Conducted 9am 01/09/2017	San Francisco, CA	Face to face	~90 mins
Reckhow, Sarah	Ass. Prof. Political Science Michigan State University; Expert on politics of education philanthropy	Conducted 2pm 01/09/2017	San Francisco, CA	Face to face	45 mins
Russo, Alexander	Education journalist; long-	Conducted 2pm 21/06/2017	New York, NY	Skype	44 mins

	time observer of TFA				
Schneider, Jack	Ass. Prof. Education, College of the Holy Cross	Conducted 10.30 25/08/2017	Worcester, MA	Face to face	67 mins
Strauss, Valerie	<i>Washington Post</i> Education Reporter; long-time observer and critic of TFA	Conducted 10.30am 22/09/2017	Washington DC	Face to face	50 mins
Tompkins-Stange, Megan	Ass. Prof. Public Policy University of Michigan; Expert on politics of education philanthropy	Conducted 3.30pm 01/09/17	San Francisco, CA	Face to face	57 mins
West, Marty	Professor of Education, Harvard	Conducted 10am 28/08/2017	Cambridge, MA	Face to face	45 mins
<i>Union leaders and other prominent TFA critics</i>					
Berkshire, Jennifer	Former writer for Massachusetts Teachers Union newspaper; now a prominent education journalist and blogger	Conducted 15/09/2017	Boston, MA	Telephone	83 mins
Ravitch, Diane	Senior policymaker in Bush Sr Administration; Critic of TFA and broader education reform movement	Conducted via email 18/08/2017	Washington DC	Email correspondence	N/A
Rubinstein, Gary	Early '90s TFA teacher; latter-day critic; prominent education blogger	Conducted 3pm 16/08/2017	New York City	Face to face	79 mins
Tang, Jessica	Current head of Boston Teachers Union	Conducted 4pm 21/11/17	Boston, MA	Telephone	26 mins
<i>Prominent education reform advocates</i>					
Barone, Charles	Policy Director, Democrats For Education Reform, former long-time Hill staffer for senior Democrats	Conducted 9.30am 20/09/2017	Washington, DC	Face-to-face	54 mins
Brisbane, Nicole	Former TFA Staffer responsible for new site development; now Director for Democrats for Education Reform in New York	Conducted 12pm 11/09/2017	New York	Skype	39 mins
Gray, Ethan	CEO and Founder of Education Cities - non-profit that advises urban districts on reform	Conducted 5pm 03/02/2017	Oregon	Telephone	57 mins
<i>Corporate and Philanthropic Donors to TFA</i>					

Gabrielli, Chris	Significant donor to TFA Massachusetts	Conducted 2.30pm 23/11/2017	Boston	Telephone	106 mins
Sullivan, Barbara	Education Director at Strategic Grant Partners - major donor to TFA	Conducted 4pm 09/10/2017	Boston	Telephone	31mins

Conduct of Interviews

Contact details for most individuals were obtained through online listings on platforms such as LinkedIn and approaches made by email. Interviewees were emailed information about the research project well in advance of the scheduled interview. Most interviews lasted around an hour in length and were conducted in person in a semi-structured fashion. Where a face-to-face meeting was not possible, telephone, skype and email were used. As the ‘probative’ nature of interview evidence in this study depends to a great degree on the identity of the interview subject being known, I did not guarantee anonymity. In accordance with approved ethics procedures, I sought explicit permission at the beginning of each interview to record or take notes of the discussion and to attribute quotations to individuals by name.⁷¹ Recorded interviews were transcribed, usually within two or three days of the interview. Where handwritten notes were taken in lieu of a recording they were typed up and augmented with supplementary notes within hours of the interview so as to minimise errors of omission or misremembering.

⁷¹ While the disclosure of the identities of the elite policymakers is a departure from standard sociological interview practice, the British Sociological Association does allow that ‘there may be fewer compelling grounds for extending guarantees of privacy or confidentiality to public organisations...governments, officials or agencies than to individuals or small groups’ (BSA, 2002). I contend that with the informed consent of interview subjects, it was entirely ethical to disclose the identities of interview subjects. This position conforms with the following guidance from the Political Studies Association: ‘Participants should be made aware of the likely limits of confidentiality and must not be promised greater confidentiality than can be realistically guaranteed’ (Berrington, Lovenduski, Parry, & Weale, 2010, p. 2).

Sample Interview Questionnaires

The precise nature of my questions varied depending on the interviewee, though some questions – such as ‘what is the legacy of TFA’ – were asked of all subjects. The following sample questionnaires illustrate the breadth of questions posed to different types of interviewee.

Outline of Questions to Eric Scroggins, Senior TFA Staffer 2000-2015

Conditions for growth

- Between 1994 and 2000 with the introduction of TFA to Chicago USD, TFA had not opened a new site. From around 2000 onwards growth of the program was dramatic. What changed?
- It seems that entry to Chicago was a major breakthrough, yet the Chicago Teachers Union was (and remains) very powerful and opposes TFA. Did TFA have to navigate union hostility to secure placements for corps members?
- What reasons do philanthropists habitually give for supporting TFA?

Site selection

- During TFA’s period of prodigious growth from 2000 until around 2011/12, what criteria were employed for selecting new regions to expand to? (e.g. favourable local politics – mayoral control, need (how determined?), local political advocates, local donors, state government support)?
- How did regional expansion actually occur? Do school superintendents approach TFA or does TFA approach key personnel in large regions? How important are local advocacy groups and coalitions?
- What are some instances where TFA had to lobby to have state regulations changed before a region could be established?
- Are there regions TFA expanded to where it could not retain a foothold?

Lobbying, Government Relations, Media Strategy

- Which government entities does TFA habitually lobby? With what regularity?
- Why do you think TFA has enjoyed broad bipartisan support among state and federal politicians?
- Does the organisation pitch its message differently to Republican and Democrat members?

Engaging with Union and Other Opposition

- Criticism of TFA has become more pronounced as the program has grown. Why?
- What are some examples of unions actively blocking TFA expansion? Where have unions been most aggressively anti-TFA?

- How does TFA counter union and other opposition?
- Teachers' unions and Democratic party have long been allies, yet many Democrats at all levels of government have broken ranks with unions to endorse and support TFA. Why do you think this is?

Other factors in expansion

- How important has the growth of charter schooling been to the expansion of TFA?
- Have TFA alumni assisted in the expansion and entrenchment of the program? Where and in what ways?

Legacy

- How is the US education system different because of TFA? What do you consider to be the major legacy of the program?

Outline of Questions to Diane Ravitch, Former Senior Policymaker, Scholar, and Prominent Teach for America Critic

Growth despite opposition from vested interests

- You have been one of TFA's most prominent critics, yet despite your condemnation and that of other experts (such as Linda Darling Hammond), the program has diffused throughout most of the United States, and has now gone global in the form of Teach for All. Why do you think this is?
 - What explains TFA's success (if one defines success in terms of the organisation's looming profile, geographical dispersal, lavish philanthropic and public funding)?
- Teachers unions' may not be as influential as Terry Moe and others might suggest, but they remain structurally powerful in a lot of school districts. Unions dislike TFA for a range of reasons, yet in a whole host of ostensibly strong union districts we see TFA has established a big footprint (e.g. New York, Los Angeles, Boston, Baltimore, Chicago). Why do you think this is?
 - Why have unions been unable to rebuff TFA?
- You and others have suggested that the Teach for America model would be inconceivable in comparable professions such as medicine, the law, engineering. Why was the teaching profession vulnerable to this sort of scheme?

TFA and Partisan Politics

- Why have policymakers on both sides of the aisle embraced TFA and aided its expansion? Has it surprised you that so many Democratic policymakers support TFA despite the strong opposition of their traditional allies, the teachers' unions? More generally, why do you think Democratic legislators have become increasingly willing to break ranks with unions?

Legacy and Future

- What do you consider the major impact of Teach for America to be? How would the American education landscape differ today if Teach for America had never come into being?
- The organisation has seemingly been on the back foot for the past few years and hasn't opened a new site since 2015? Why do you think it has come under more intense scrutiny in recent years? What do you think is the 'endgame' for TFA?

Outline of Questions to Martin West, Associate Professor, Harvard Graduate School of Education

- Why was TFA – an audacious idea from a recent college graduate – able to get off the ground?
- What factors enabled TFA to grow so much during the 2000s?
- Why was TFA able to get into strong union districts such as Boston?
- How did TFA become politically powerful?
- Why the recent backlash?
- How is American educational landscape different because of TFA?

Strengths and Limitations of Interview Data

The utility of elite interviews in this thesis was twofold. Firstly, the interview subjects, by virtue of their privileged and influential positions, were well positioned to corroborate, contextualise and complicate what had been inferred from documentary sources (Tansey, 2007). Secondly, in the course of interviews averaging a little over an hour in length, it was possible to thoroughly probe the attitudes and beliefs of influential actors (Aberbach & Rockman, 2002). Open-ended questioning encouraged a deeper and more temporally expansive reflection on the events of interest than anything interviewees had previously put on the public record.

Of course, the evidence gathered in these interviews must be treated with circumspection. There are clear challenges posed by post-hoc rationalisations and stylisations or simplifications of processes that were in fact messier and less coherent than interviewees recalled. Moreover, several interviewees were long-time public figures and very polished presenters, adept at giving platitudinous or evasive responses. Despite my best efforts to remain alert to this phenomenon and to combat it with incisive and persistent questioning, it was not always possible to probe evasions or apparent contradictions. Finally, the fallibility of human memory means that individuals' recollections of key events, debates and even their own past thoughts is liable to be imperfect. There are, however, strategies that can be employed to counter the problems of forgetting. The recounting of events can be assisted by the documentary record and the judicious intervention of the interviewer who can 'prompt forgotten names and places, challenge some assertion, and compare it with descriptions and opinions given by other interviewees' (Selwyn, 2013, p. 349). Finally, 'mis-rememberings' or omissions are themselves potentially indicative of important sensitivities or critical moments.

Appendix B: Teach for America and Teach for All

A thorough explanation of the diffusion of Teach for All requires a comprehensive quantitative analysis, including all pertinent variables such as political regime type; GDP per capita; absolute levels of educational attainment as well as inequalities in attainment; the relative strength of teachers unions; country membership of intergovernmental organisations such as the OECD; the average cognitive ability of a country's teaching profession; and so on. Such an analysis is not possible at present owing to a lack of good data for many key measures. For instance, while the Program for International Student Assessment (PISA) has measured educational attainment and inequalities since 2000, its coverage is limited to OECD nations and a handful of partner countries. In 2006, the PISA year most proximate to 2007 when TFAll was founded and member organisations began to proliferate, only 50 countries participated in testing and these skewed rich and democratic. An alternative measure of educational attainment is the World Bank's harmonised test scores from the Human Capital Index. This measure has a much greater spread – encompassing 157 countries and constituting a much more representative sample of the whole – but the data dates from 2017, a full decade after TFAll began to diffuse. Similarly, there is no good cross-national measure of teacher union strength, however one defines it, be it membership rates, union expenditures on elections, or the extent to which policy reflects union preferences. Unless data of this sort can be assembled, a comprehensive explanation for the diffusion of TFAll will prove elusive.

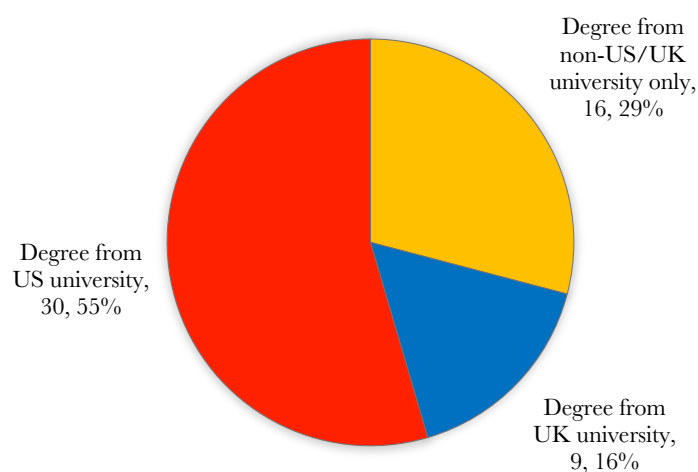
Because data for federal/unitary status is straightforward to obtain I ran a simple bivariate logit regression (as is appropriate for binary variables) to test the *prima facie* plausibility of the notion that TFAll programs are more likely to take root in federal countries because they offer more venues and therefore better odds for challenger organisations looking to

infiltrate a policy system. I used the World Bank's list of countries to create a universe of cases (n=215). I obtained data for the binary variable *federation* (1 = yes; 0 = no) from the Forum of Federations (2020) – an intergovernmental network on federalism and devolved governance (n=25). The list of countries with TFAI member organisations was obtained from the Teach for All website in late 2019 (n=53). This regression found a statistically significant positive relationship between federations and spread of TFAI as anticipated, but more sophisticated quantitative analysis with appropriate controls must be conducted before firm conclusions can be reached. Moreover, using federal/unitary status as proxy for 'many venues' probably underestimates the effect. Even in unitary nations, education governance can be devolved to lower levels (i.e. Japan), thereby creating a multitude of venues and decisionmakers empowered to accept or reject TFAI corps.

Finally it would appear from a preliminary investigation, that Teach for All, like Teach for America, may be heavily reliant on elite networks for its diffusion. Using biographical information about the founders of TFAI member organisations from the TFAI website and LinkedIn profiles where available, I derived descriptive statistics about the educational and professional backgrounds of the 55 founders of the 53 Teach for All network organisations.⁷² There are distinct patterns in the data. My analysis finds a preponderance of individuals with degrees from universities in the global north. As Figure 12, below indicates, a significant majority of founders (71%) hold at least one degree from a US or UK university, yet Teach for America and the UK's Teach First make up less than 4% of all TFAI network organisations.

⁷² Data was collected in November 2019

Figure 12: Educational Backgrounds of the 55 Founders of the 53 Teach For All Organisations



A majority of TFAAll founders have post-graduate degrees, with an average of 1.9 degrees per founder. Many have attended world-renowned institutions, with the most common *alma mater* being Harvard University (see Figure 13, below). Master's degrees from the Harvard Kennedy School and the Harvard Graduate School of Education are the modal specific degree programs. A majority of founders have also had significant professional experiences outside of their native countries (56%), with the plurality having worked in the United States (33%). Other Teach For organisations, major multinational consultancies such as McKinsey & Co, and multilateral organisations such as the United Nations featured most commonly in the work histories of the 55 founders (see Figure 14 below). As related above, several TFAAll founders have explicitly suggested that their international mobility and elite educations led them to encounter Teach for America and inspired them to transplant the model to their home countries (Kwauk et al., 2016).

Figure 13: Alma maters of the 55 founders of the 53 Teach for All organisations

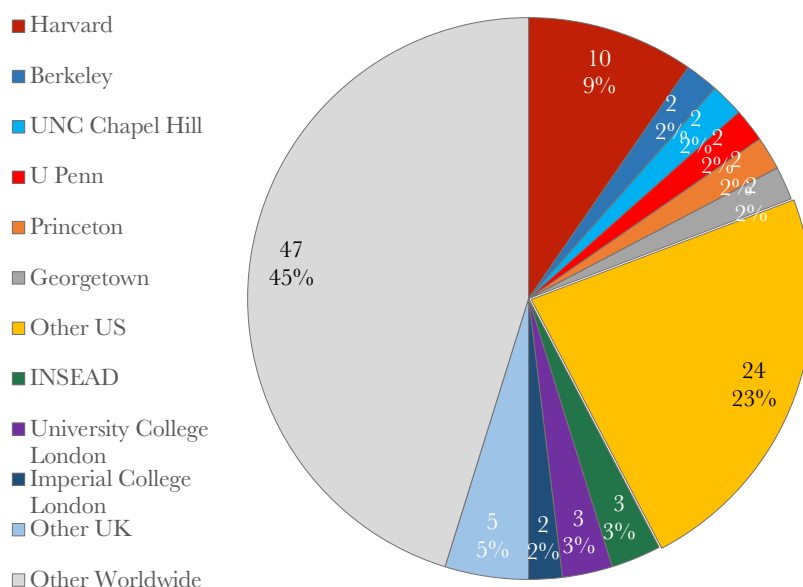
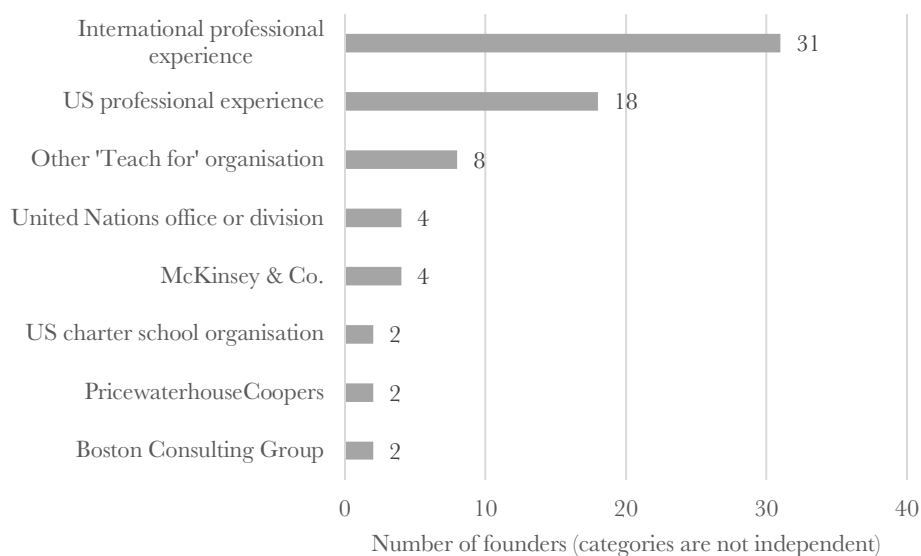


Figure 14: Most common professional experiences among the 55 Teach for All founders



Given the manifest influence of Teach for America on the K-12 system of the United States and the apparently similar effects of Teach First in the UK, scholars of education policy should make it a priority to gain a better understanding how and why this phenomenon is spreading rapidly and the factors that mediate its impact once *in situ*.

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