

Measuring Diversity in Charter School Offerings

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A M E R I C A N E N T E R P R I S E I N S T I T U T E

Executive Summary

There are two main reasons given to support charter schooling: (1) that charter schools will improve academic achievement by taking advantage of flexibility not afforded to traditional public schools; and (2) that deregulation will allow for more diverse schools than would otherwise be created. The academic achievement argument tends to get the most attention, but research strongly suggests that parents want more from schools than just high test scores.

So what do we know about the diversity of charter school options across the country? In this paper, we offer the beginnings of an answer to that understudied question by coding 1,151 charter schools educating more than 471,000 students in 17 different cities. We searched the website of every charter school for descriptive words about their mission, vision, educational philosophy, academic model, or curriculum. We used these words to code the school as “general” or “specialized.” Specialized schools were further broken down into 13 possible types, including no-excuses; science, technology, engineering, and mathematics (STEM); arts; single-sex; and military schools.

Looking at the number of schools and enrollment data for each type, we uncovered several important findings. We discovered that there is an almost exactly even split between general and specialized charter schools, with the most common types of specialized schools being no-excuses and progressive schools. We also found significant variation in the charter market between cities. This can be partially explained by city-level factors including demographics, the age and market share of the charter sector, and the number and type

of authorizers. For example, we found that the higher the percentage of black residents that a city has, the larger the enrollment in no-excuses schools ($r = 0.491$). We also found that the poorer the city, the more likely it is to have specialized charter schools ($r = -0.394$), and the more authorizers a city has, the more students it enrolls in specialized schools ($r = 0.188$).

To explain our findings, we offer three plausible theories. The first is that communities and charter operators might organize themselves around Maslow’s hierarchy of needs. Academic achievement is often the primary concern for low-income communities; thus, there are more no-excuses and STEM schools in poorer communities. But in wealthier communities, families have the luxury of looking for specialized options such as international and foreign language schools, and thus we see the positive relationship between city wealth and enrollment in such schools. Second, operators and authorizers might be inclined to support established models over models that are truly innovative but harder and riskier to implement; hence we see replication of proven no-excuses models like KIPP. Perhaps as more diverse schools crop up around the country and demonstrate their ability to create high-quality schools, we’ll see an increase in the desire to scale them. Finally, it could be the case that market diversity is related to maturity, in which case it could be too early to judge market diversity in some of these cities, as charter schools are still a small part of their educational landscape. This paper is an attempt to bring some descriptive analysis to a question that we believe should be the focus of more sustained inquiry.

Measuring Diversity in Charter School Offerings

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The growth of charter schools over the past 25 years has been quite remarkable. In 1990, there were zero charter schools in America. In the 2013–14 school year, 2.5 million students—more than 5 percent of American public school children—attended 6,440 charter schools, and those numbers are only increasing. Republicans and Democrats alike have embraced charter schools. Hillary Clinton is on record saying, “I stand behind the charter school/public school movement, because parents do deserve greater choice within the public school system to meet the unique needs of their children.”¹ *The Daily Beast* called charter schools “the issue bringing Ted Cruz and Black Democrats together.”²

The arguments for charter schools tend to fall into two buckets. First, advocates argue that charter schools will increase student achievement. Charter schools were created to give teachers more freedom to teach how they see fit. By removing regulations and red tape and decentralizing the operation of schools, students’ education will be more closely tailored to their particular needs. All of this is intended to improve the instructional quality of the education that children receive.

Twenty-five years in, we have a robust body of evidence examining this argument. From random-assignment studies of charter schools in Boston and New York to matched-comparison studies of tens of millions of students around the country to numerous smaller-scale studies of individual school models such as KIPP, we have an increasingly clear picture of the academic performance of charter schools.³

But in this quest to better understand the academic performance of schools, a second part of the argument for charter schools can get swept aside. Part of the charter school theory of action is that the freedom given to charter schools will allow for the creation of schools

with more diverse offerings than might be created by traditional school management mechanisms. This is what Clinton alluded to when she argued for greater choice to meet the unique needs of children.

We know far less about this facet of the charter school landscape. This is unfortunate because we have reason to believe that parents want more diverse offerings. In 2013, the Thomas B. Fordham Institute released a survey entitled “What Parents Want: Education Preferences and Trade-Offs.”⁴ After using a polling firm to contact more than 2,000 parents, researchers were able to identify six different market “niches,” or preference clusters that would drive families to choose a particular type of school. One of these groups, “test-score hawks,” wanted—you guessed it—high test scores. These are the folks with whom studies that compare the test scores of charter school and non-charter school students particularly resonate.

But there were other groups of parents as well. “Pragmatists,” for example, wanted vocational preparation. “Jeffersonians” wanted citizenship education. “Multiculturalists” wanted to expose their children to students from diverse backgrounds. “Expressionists” wanted strong arts and music instruction. “Strivers” wanted their children to get into top-tier colleges. Clearly, parents want more from schools than just to maximize test scores.

Charter schools have seen large market penetration in several cities. More than 90 percent of students in New Orleans now attend charter schools. Around 50 percent of students in Detroit and Washington, DC, do as well. In Los Angeles, more than 117,000 students attend charter schools, which would make its charter school market the 23rd largest school district in the United States. As these markets expand the number of families that they serve, they will increasingly

serve families with distinct tastes. In order to grow and thrive, they will need to figure out how to meet these families' needs. Failure to do so will be a liability.

In this paper, we set out to ask a very simple question: how diverse are the offerings of charter schools today? We examined the charter markets of 17 cities chosen to reflect diversity in both size and charter market, comprising a total of 1,151 charter schools educating more than 471,000 students, and coded them by their curricular or pedagogical specializations.

We uncovered several important findings:

1. There is an almost even 50/50 split between “general” and “specialized” charter schools. That is, half of schools do not have a particular pedagogical or curricular emphasis; they are traditionally organized and operated schools that focus simply on providing a good education.
2. In terms of the number of schools, the two most common specializations are progressive and no-excuses schools, with 101 schools identifying themselves as no-excuses and 101 schools identifying themselves as progressive.
3. There is variation in the charter market from city to city.
4. There are city-level factors that appear to relate to the diversity of charter school offerings, including the number and type of authorizers, the age and market share of the sector, and the demographics of the community.

In the following sections, we will first describe our coding mechanism. Then we will present and discuss the results, taking city context into consideration. Finally, we will close with some reflections on diversity of offerings and policy.

A Charter School Taxonomy

Classifying charter schools is an inherently subjective business. What exactly makes a school a no-excuses school might vary from the perspectives of different

observers. How much science and technology needs to be in a school before it becomes a STEM school might as well. We attempted to code schools systematically, based on specific terms mentioned on the schools' websites, but at times we simply had to use our best judgment.

To create our sample, we first identified charter schools in the 17 cities we chose using the National Alliance for Public Charter School's charter school dashboard. We included all charter schools that operated in those cities in the 2012–13 school year and have not since closed or announced that they are going to close. In total, there were 1,151 schools.

After determining the set of schools in each city, we went to the website of each school and looked for descriptive words about its mission, vision, educational philosophy, academic model, or curriculum. We used key words such as “no excuses,” “project-based,” and “STEM” to classify schools as being “specialized.” If a school had a keyword or phrase associated with specialization, it was classified as “specialized.” If a school's mission statement or “about us” section lacked any of those terms, it was classified as “general.” Schools could be either general or specialized, not both.

Within the subset of specialized schools, we then classified schools based on their pedagogical or curricular focus. In doing so, there was overlap between categories; it is possible, for example, to have a no-excuses STEM school or a classical single-sex school. All of that said, the “specialized” schools were classified into 13 total categories.

Pedagogical Emphasis. The first set of categories relates to the methods of teaching or organization of the school. In other words, they indicate differences in how students are taught.

No Excuses. The “no excuses” label is particularly slippery. It is generally used to describe schools that have strict discipline systems and high expectations for student behavior. We coded schools as being “no excuses” if they identified themselves as such (many do), if they referenced particular classroom management techniques that are commonly associated with no-excuses schools (like “SLANT”), or if they belonged to networks traditionally identified as no-excuses (like KIPP schools).

Progressive. Schools were classified as progressive if they identified themselves as such, if they were “project-” or “inquiry-based,” if they were a Waldorf school or followed the teaching of Rudolf Steiner, if they were a Montessori school, or if they described their pedagogical approach as “child-” or “learner-centered.”

Credit Recovery. Several different types of schools fell into this category, including schools specifically designed to reengage students who had dropped out, schools for adjudicated youths or young parents, and schools that were designed to help students recover credits needed to graduate.

Classical. Many classical schools explicitly described themselves as such, but we also classified schools as “classical” if they stated that they used the Socratic method or emphasized the Trivium (grammar, dialectic, and rhetoric; also called the “three-fold way”).⁵

Hybrid or Online. This category was much more straightforward than most other categories. If a school divided its teaching between human educators and computers, it was considered a hybrid school. We also counted online schools that had their physical location in the cities we were examining, though some of those schools’ students may not live within the city’s boundaries.

Purposefully Diverse. In recent years, a new crop of schools has purposely tried to create a racially and socioeconomically diverse student body.⁶ We coded schools as purposefully diverse if they mentioned promoting diversity as a goal of theirs on their website. But two things are of note. First, some of these schools are very new and thus did not show up in our data set. Second, some schools might try to do this informally, but because our coding was based on how they describe themselves on their website, we might not have categorized them as purposefully diverse.

Single Sex. Any schools that were entirely single sex or offered some single-sex grade levels or classes were coded as single-sex schools.

Content Specializations. The second set of categories relates to what subjects schools specialize in teaching.

Here, the content is more pertinent than the method of instruction.

STEM. We coded all schools that claimed they were STEM focused, or that identified as a mathematics or science school, as STEM schools. We also coded schools that had a STEAM focus (that is, a focus on STEM and the arts) as both STEM and arts.

Arts. If the school had a focus on the fine or performing arts, if it used an arts immersion educational model, or if it called itself a STEAM school, we coded it as an “arts” school.

International/Foreign Language. Many schools identify as “international” schools. Almost universally, this means that students spend a significant amount of time learning a foreign language. Schools may also spend considerable time teaching global cultural practices. Therefore, we coded schools that identify as international schools or that offer language immersion programs as international/foreign language schools.

Military. There are a small number of schools that have a military focus. Students often wear military uniforms for some or all of their week and drill as military units would. A JROTC program offered as one of many extracurricular options was not enough to merit categorization as a military school. The military aspect had to be a core focus of the school, not merely one in a list of features.

Vocational Training. Vocational schools were tough to place in either bucket, pedagogical or content. Certainly the content that they teach is unique—job skills and hands-on training in machinery and skilled labor—but the pedagogy and goals of the school are unique as well. Ultimately, we settled on calling it a content specialization. To be considered a vocational school, the school had to have a clear emphasis on vocational skills, not just a single vocational course option or extracurricular.

Public Policy. Schools that focus on civic engagement, political knowledge and participation, and development

of public policy knowledge were coded as public policy schools. Schools that focused on law or social justice were also categorized as public policy schools.

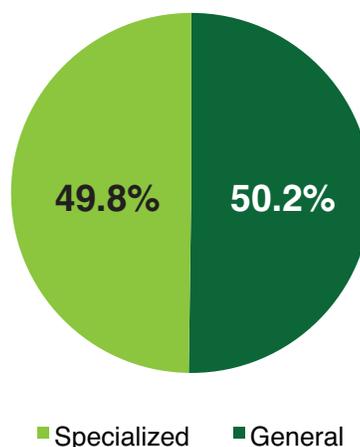
Findings

We will present our findings in two ways. First, we will combine all 17 cities into one national picture, and then we will break them out and look at each individual city.

National. First, let’s look at the breakdown between general and specialized schools. In our total sample of 1,151 schools, we classified 578 (50.2 percent) as “general” and 573 (49.8 percent) as “specialized.” In figure 1, each school was counted only once, even if it had multiple specializations. (For example, a STEAM school would not get counted once for STEM and once for arts—just once as a specialized school.) Within that 49.8 percent slice of the pie, the breakdown of specialized school types is illustrated in figure 2.

Another way to look at these data is by the number of students enrolled. Some schools are larger than others, so looking solely at the number of schools might mask the true market share of particular kinds of charter schools. In fact, while the average school size across all types is 409 students, certain types of charter schools

FIGURE 1
TYPES OF CHARTER SCHOOLS

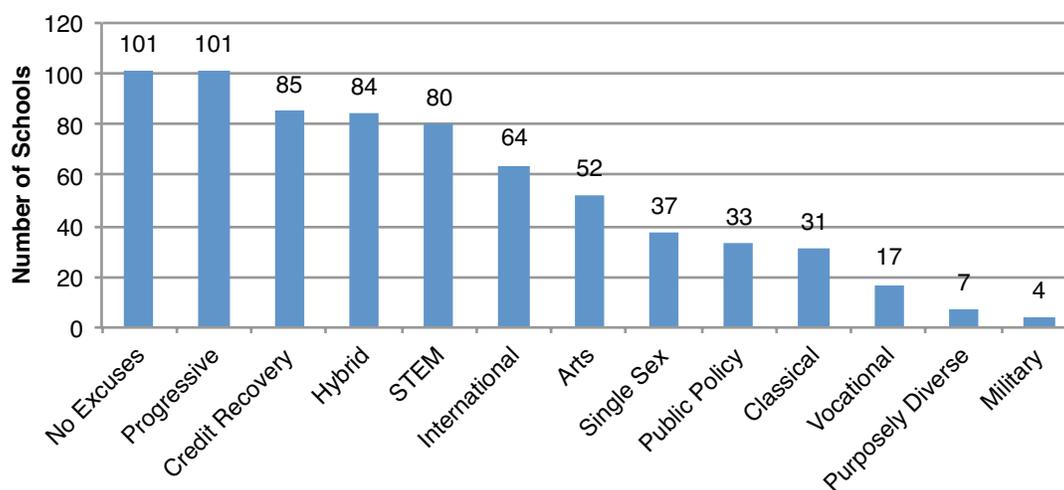


Source: Authors’ calculations.

average significantly more students per school than others, as shown in table 1.

In total, more than 471,000 students were enrolled in the charter sector in our sample. Figure 3 shows the breakdown in enrollment between specialized and general schools. Looking at the number of students enrolled instead of the number of schools, the split swings to 55.5 percent general schools and 44.5 percent specialized schools.

FIGURE 2
SPECIALIZED CHARTER SCHOOLS: BY THE NUMBERS



Source: Authors’ calculations.

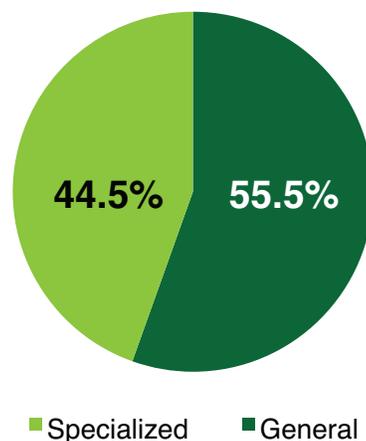
TABLE 1
AVERAGE SCHOOL ENROLLMENT OF DIFFERENT TYPES OF CHARTER SCHOOLS

School Type	Average Enrollment per School
General	452
Public Policy	451
Hybrid	441
STEM	424
Arts	418
International/Foreign Language	416
Overall Average	409
No Excuses	395
Classical	349
Progressive	319
Single Sex	314
Purposely Diverse	283
Vocational Training	274
Military	265
Credit Recovery	178

Source: Authors' calculations.

Broken down by enrollment, progressive and credit-recovery schools take a hit, as their schools tend to be much smaller on average (figure 4). No-excuses schools

FIGURE 3
CHARTER SCHOOL ENROLLMENT BY TYPE

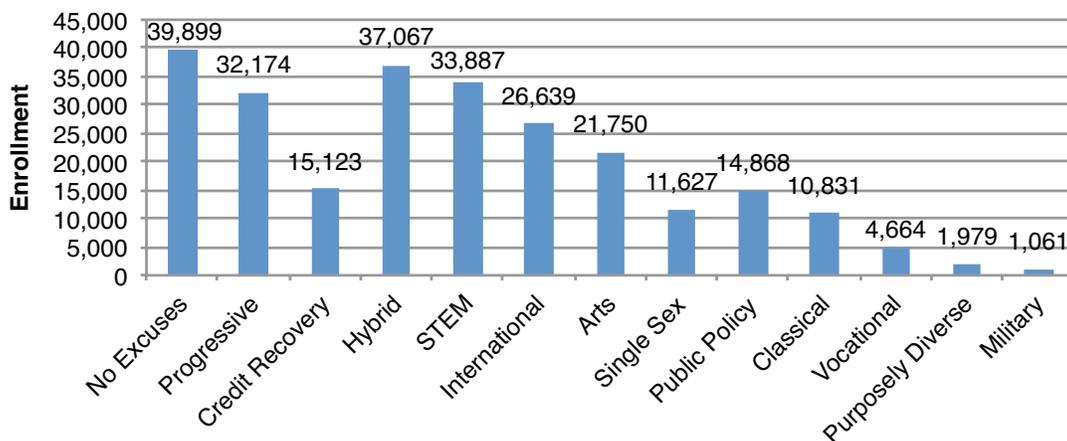


Source: Authors' calculations.

pull away from the pack, but hybrid/online schools are not far behind, which makes sense given that many explicitly use technology to educate larger numbers of students than traditional schools can serve.

While we will see similar patterns across the cities in the sample, there are some cases in which particular charter markets deviate from the norm.

FIGURE 4
ENROLLMENT IN SPECIALIZED CHARTER SCHOOLS



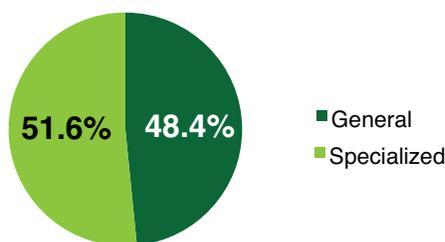
Source: Authors' calculations.

FIGURE 5
WASHINGTON, DC

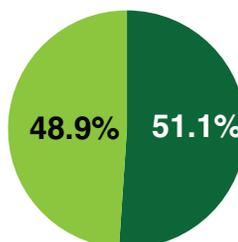
City-Level Demographics	White alone, not Hispanic or Latino, 2010	34.8%
	Black alone, 2010	50.7%
	Hispanic or Latino, 2010	9.1%
	Other, 2010	6.8%
	Language other than English spoken at home, percent of persons age 5+ years, 2009–13	15.8%
	Median household income (in 2013 dollars)	\$65,830
	Total number of charter schools (SY 2012–13)	95
	Total charter school enrollment (SY 2012–13)	31,894

Source: Authors' calculations and census data from www.census.gov/quickfacts/table/PST045214/2622000,4748000,3410000.

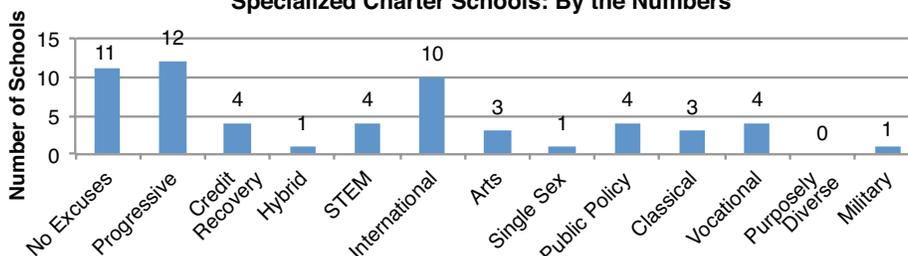
Types of Charter Schools



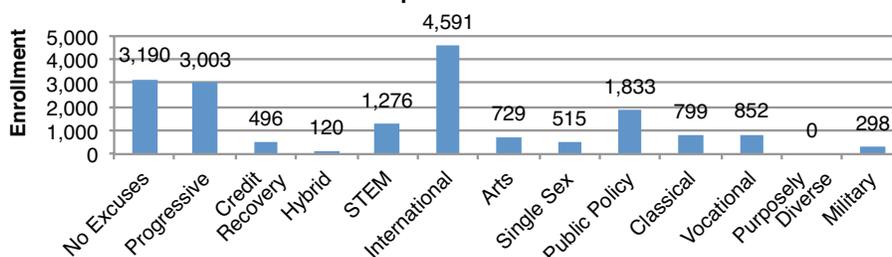
Charter School Enrollment by Type



Specialized Charter Schools: By the Numbers



Enrollment in Specialized Charter Schools



Source: Authors' calculations.

Home to a whopping 95 charter schools and having the highest median income of the 17 cities surveyed, Washington, DC, has similar numbers of no-excuses and progressive schools, much like the national trend. However, Washington is unique in its large number of

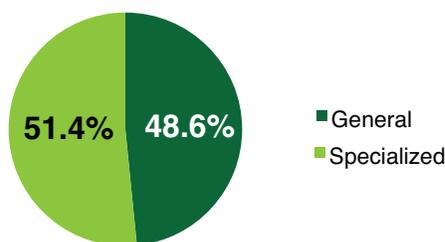
international schools—10 schools, together enrolling almost 4,600 students. This represents 14.4 percent of all charter school students in the District of Columbia. Washington also has several public policy schools that enroll 1,800 students combined.

FIGURE 6
NEW ORLEANS, LOUISIANA

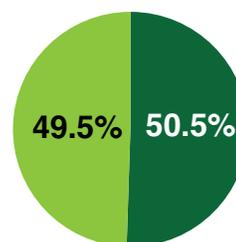
City-Level Demographics	White alone, not Hispanic or Latino, 2010	30.5%
	Black alone, 2010	60.0%
	Hispanic or Latino, 2010	5.2%
	Other, 2010	4.9%
	Language other than English spoken at home, percent of persons age 5+ years, 2009–13	9.8%
	Median household income (in 2013 dollars)	\$37,146
	Total number of charter schools (SY 2012–13)	70
	Total charter school enrollment (SY 2012–13)	35,870

Source: Authors' calculations and census data from www.census.gov/quickfacts/table/PST045214/2622000,4748000,3410000.

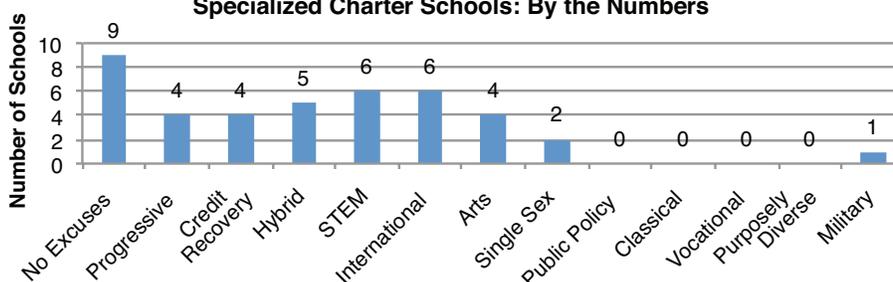
Types of Charter Schools



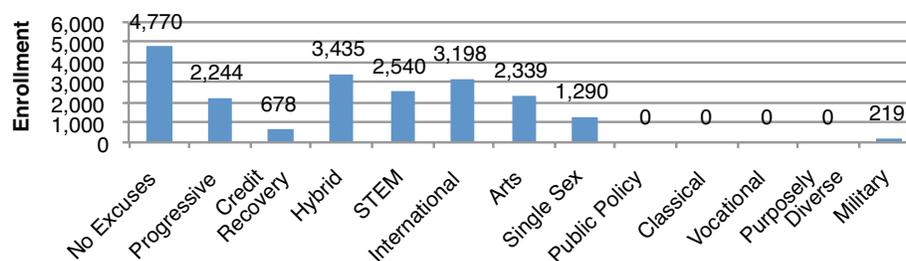
Charter School Enrollment by Type



Specialized Charter Schools: By the Numbers



Enrollment in Specialized Charter Schools



Source: Authors' calculations.

New Orleans has the third-highest percentage of black residents of the cities surveyed, at 60 percent, and a median income that is about two-thirds of the national figure. The city has a large number of no-excuses charter schools, which collectively enroll

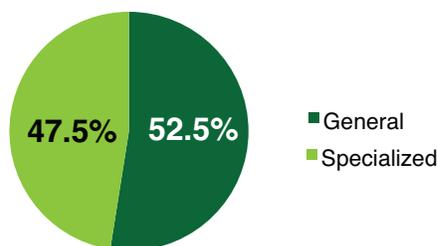
13.3 percent of all charter school students in the city. Beyond that, five other types of schools each have relatively equal numbers of schools and students, suggesting that New Orleans families have a fairly broad set of options from which to choose.

FIGURE 7
DENVER, COLORADO

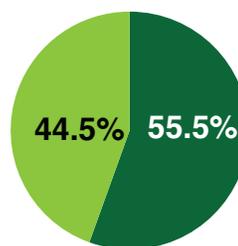
City-Level Demographics	White alone, not Hispanic or Latino, 2010	52.2%
	Black alone, 2010	10.2%
	Hispanic or Latino, 2010	31.8%
	Other, 2010	9.0%
	Language other than English spoken at home, percent of persons age 5+ years, 2009–13	26.9%
	Median household income (in 2013 dollars)	\$50,313
	Total number of charter schools (SY 2012–13)	40
	Total charter school enrollment (SY 2012–13)	13,020

Source: Authors' calculations and census data from www.census.gov/quickfacts/table/PST045214/2622000,4748000,3410000.

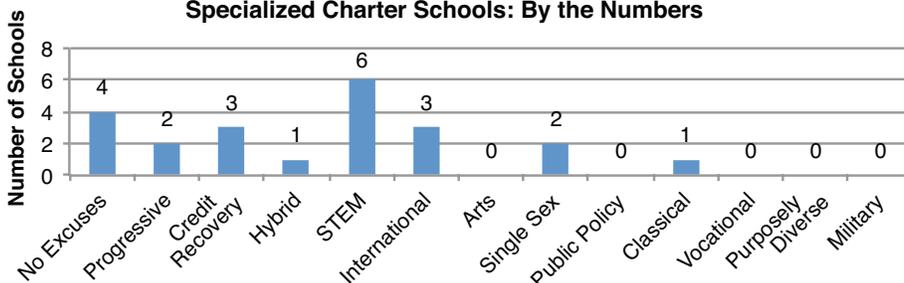
Types of Charter Schools



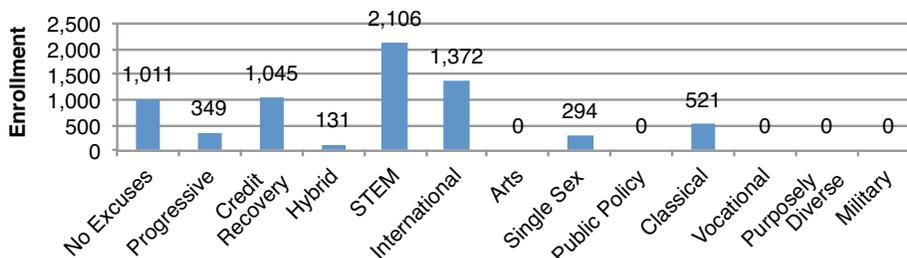
Charter School Enrollment by Type



Specialized Charter Schools: By the Numbers



Enrollment in Specialized Charter Schools



Source: Authors' calculations.

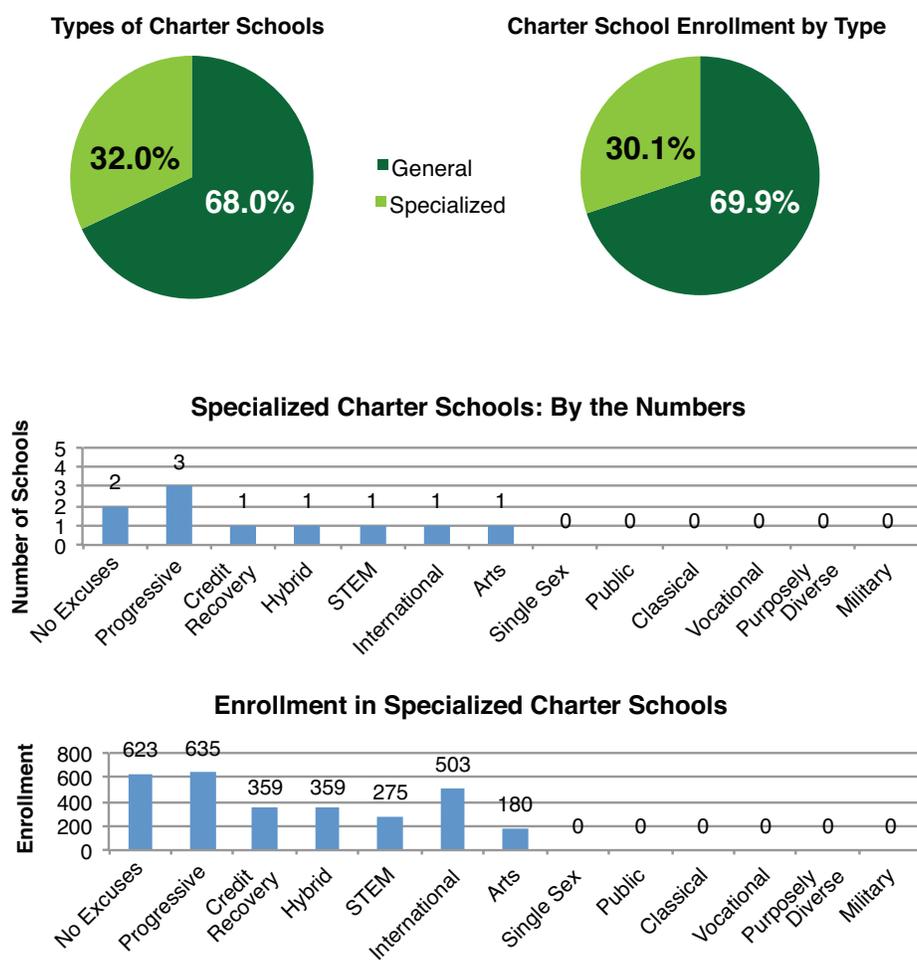
In Denver, STEM schools are the most common, followed by no-excuses, international, and credit-recovery schools. STEM schools enroll more than 2,000 students, or 16.2 percent of charter school students in

the city. In contrast, Denver lacks even a single arts school, and less than 300 students attend single-sex or hybrid schooling options.

FIGURE 8
BOSTON, MASSACHUSETTS

City-Level Demographics	White alone, not Hispanic or Latino, 2010	47.0%
	Black alone, 2010	24.4%
	Hispanic or Latino, 2010	17.5%
	Other, 2010	13.2%
	Language other than English spoken at home, percent of persons age 5+ years, 2009–13	35.8%
	Median household income (in 2013 dollars)	\$53,601
	Total number of charter schools (SY 2012–13)	25
	Total charter school enrollment (SY 2012–13)	7,956

Source: Authors' calculations and census data from www.census.gov/quickfacts/table/PST045214/2622000,4748000,3410000.



Source: Authors' calculations.

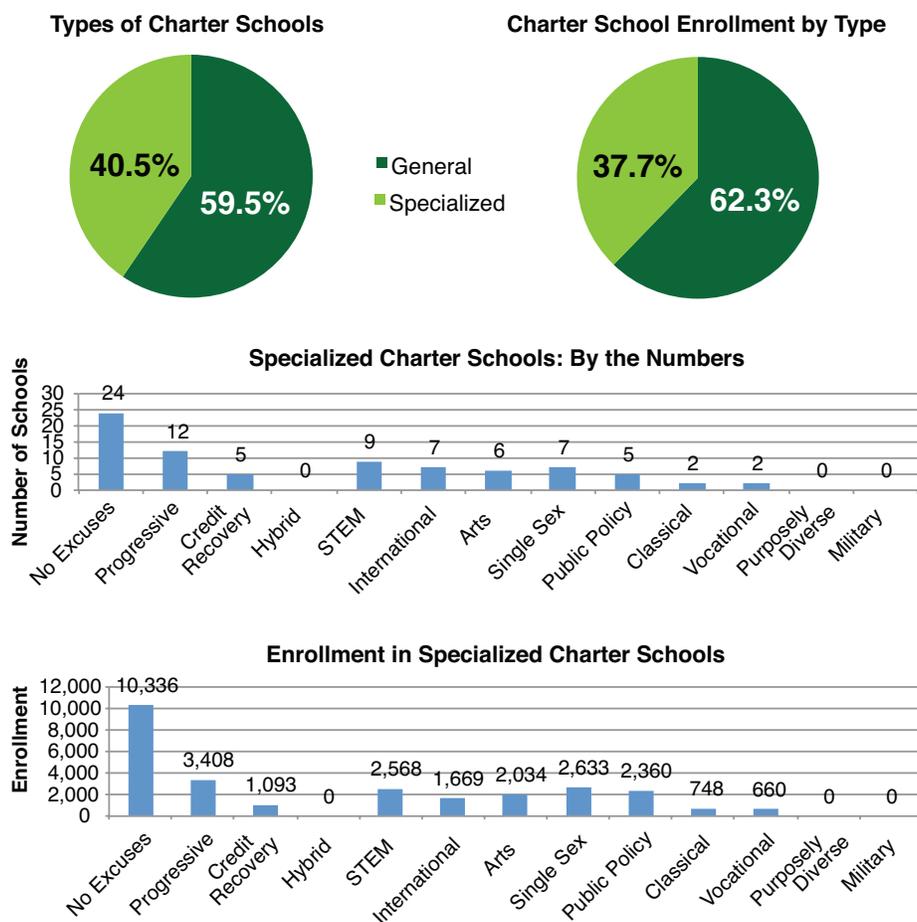
Boston has a large number of general schools—17 of its 25 charter schools merit this designation. Three other schools are progressive schools, and two are no excuses. More than one-third of Boston residents report

speaking a language other than English at home, but Boston has only one international school, which served 503 students in the 2012–13 school year.

FIGURE 9
NEW YORK CITY

City-Level Demographics	White alone, not Hispanic or Latino, 2010	33.3%
	Black alone, 2010	25.5%
	Hispanic or Latino, 2010	28.6%
	Other, 2010	17.5%
	Language other than English spoken at home, percent of persons age 5+ years, 2009–13	48.8%
	Median household income (in 2013 dollars)	\$52,259
	Total number of charter schools (SY 2012–13)	158
	Total charter school enrollment (SY 2012–13)	57,436

Source: Authors' calculations and census data from www.census.gov/quickfacts/table/PST045214/2622000,4748000,3410000.



Source: Authors' calculations.

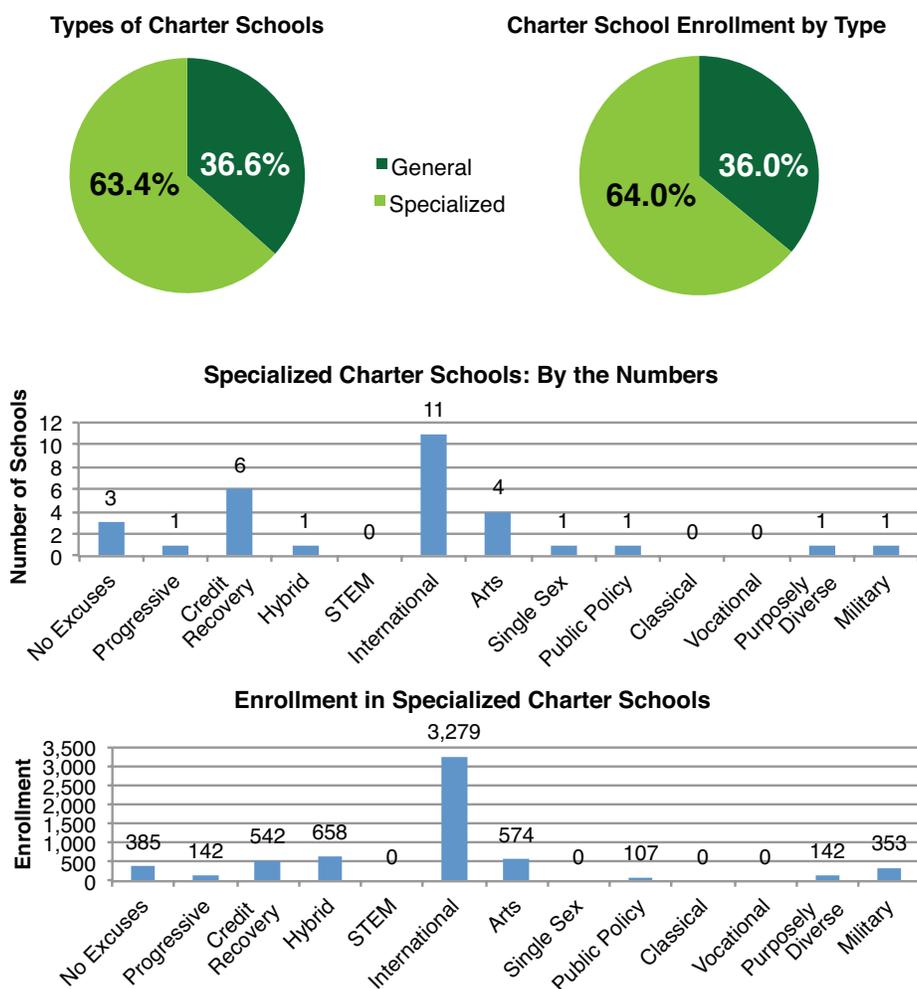
New York City is home to a whopping 158 charter schools, with three out of five classified as general. Of the specialized charter schools, no-excuses schools predominate, with 24 schools serving more than 10,000 students. Progressive schools are also popular, with 12 schools. One option that is not currently available in

New York City is hybrid learning. New York City has an extremely diverse population: 33 percent white, 26 percent black, 29 percent Hispanic or Latino, and nearly half of residents speak a language besides English at home.

FIGURE 10
MINNEAPOLIS, MINNESOTA

City-Level Demographics	White alone, not Hispanic or Latino, 2010	60.3%
	Black alone, 2010	18.6%
	Hispanic or Latino, 2010	10.5%
	Other, 2010	12.0%
	Language other than English spoken at home, percent of persons age 5+ years, 2009–13	20.3%
	Median household income (in 2013 dollars)	\$49,885
	Total number of charter schools (SY 2012–13)	41
	Total charter school enrollment (SY 2012–13)	8,968

Source: Authors' calculations and census data from www.census.gov/quickfacts/table/PST045214/2622000,4748000,3410000.



Source: Authors' calculations.

Note: Enrollment numbers not available through National Alliance for Public Charter Schools for the single-sex school.

Nearly two-thirds of Minneapolis's charter schools are specialized, with a plurality being international schools. International schools enroll more than 36 percent of charter school students in Minneapolis. The

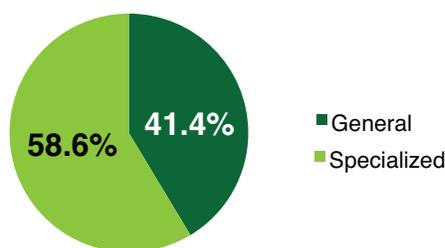
no-excuses and progressive models frequently used in other parts of the country are less common in Minneapolis, with three schools and one school, respectively, and there are no STEM schools.

FIGURE 11
INDIANAPOLIS, INDIANA

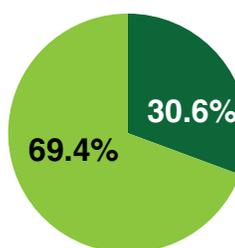
City-Level Demographics	White alone, not Hispanic or Latino, 2010	58.6%
	Black alone, 2010	27.5%
	Hispanic or Latino, 2010	9.4%
	Other, 2010	5.2%
	Language other than English spoken at home, percent of persons age 5+ years, 2009–13	12.6%
	Median household income (in 2013 dollars)	\$41,962
	Total number of charter schools (SY 2012–13)	29
	Total charter school enrollment (SY 2012–13)	18,511

Source: Authors' calculations and census data from www.census.gov/quickfacts/table/PST045214/2622000,4748000,3410000.

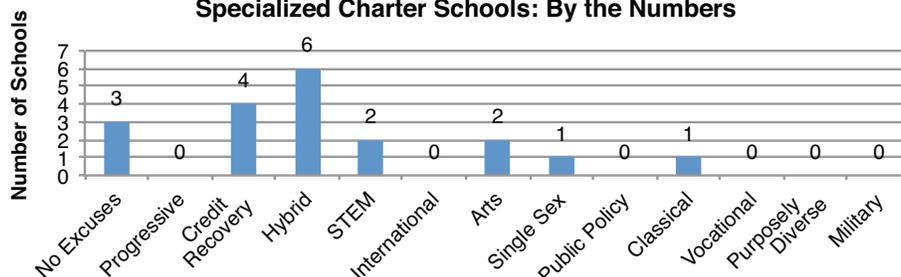
Types of Charter Schools



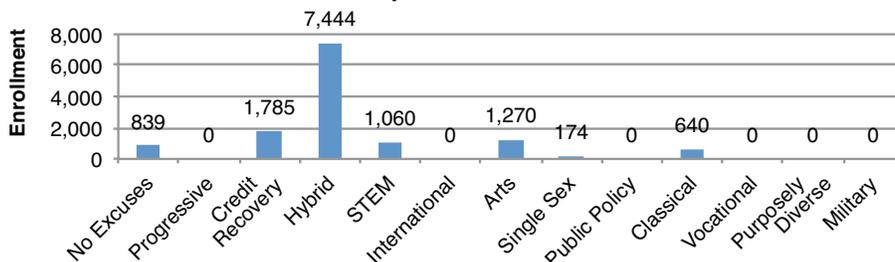
Charter School Enrollment by Type



Specialized Charter Schools: By the Numbers



Enrollment in Specialized Charter Schools



Source: Authors' calculations.

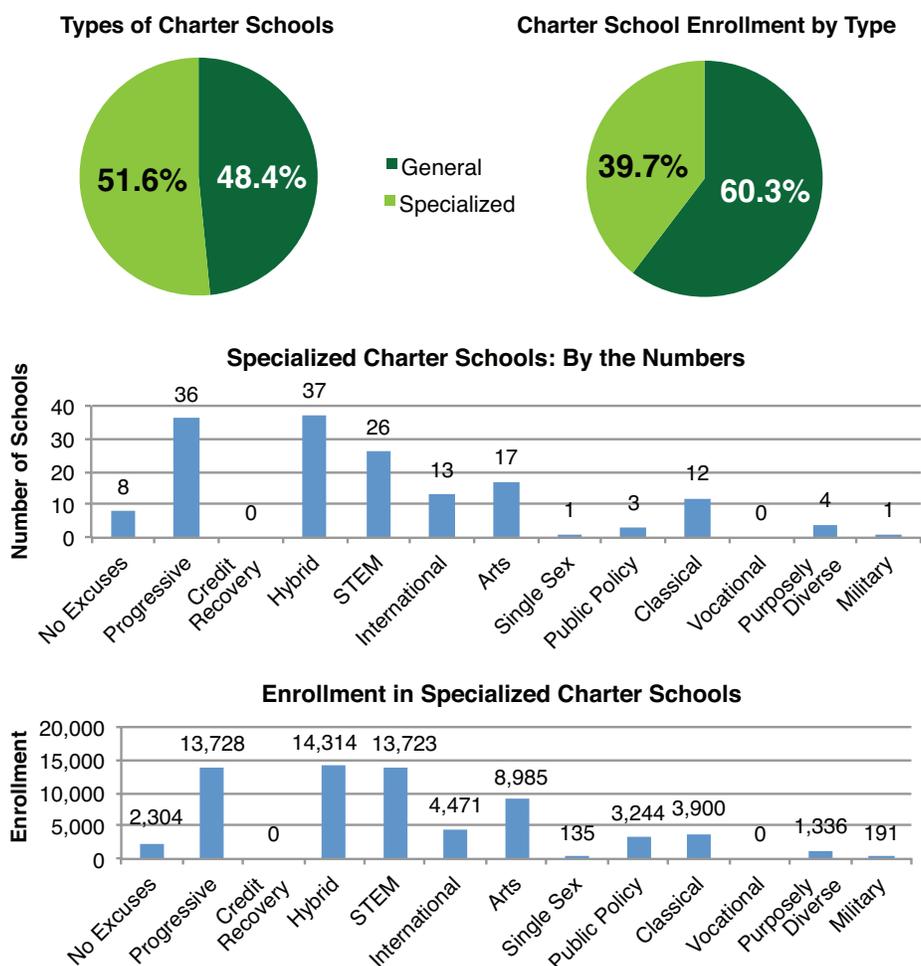
Specialized charter schools enroll nearly 70 percent of all charter school students in Indianapolis, and 40 percent of Indianapolis charter school students are enrolled in one of six hybrid schools. There are also

several credit-recovery and no-excuses schools, but they enroll far fewer students than hybrid schools. Indianapolis has no progressive or international options for students.

FIGURE 12
LOS ANGELES, CALIFORNIA

City-Level Demographics	White alone, not Hispanic or Latino, 2010	28.7%
	Black alone, 2010	9.6%
	Hispanic or Latino, 2010	48.5%
	Other, 2010	16.7%
	Language other than English spoken at home, percent of persons age 5+ years, 2009–13	60.2%
	Median household income (in 2013 dollars)	\$49,497
	Total number of charter schools (SY 2012–13)	225
	Total charter school enrollment (SY 2012–13)	117,959

Source: Authors' calculations and census data from www.census.gov/quickfacts/table/PST045214/2622000,4748000,3410000.



Source: Authors' calculations.

Los Angeles has the most charter schools and the highest enrollment of any city in our sample. Hybrid (37) and progressive schools (36) are the most common, but the 26 STEM schools tend to be larger. Those three types each enroll more than 13,000 students. Los Angeles also

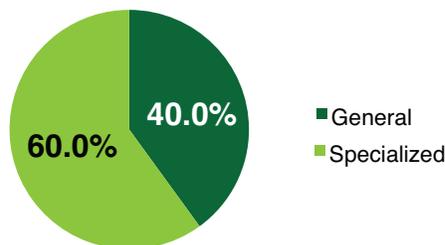
has almost 9,000 students in 17 arts schools. Notably, although 49 percent of residents are Hispanic or Latino and more than 60 percent speak a language besides English at home, the 13 international schools only enroll 3.8 percent of charter school students in Los Angeles.

FIGURE 13
ATLANTA, GEORGIA

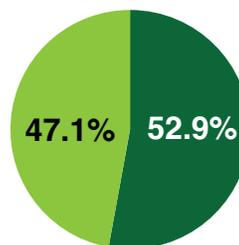
City-Level Demographics	White alone, not Hispanic or Latino, 2010	36.3%
	Black alone, 2010	54.0%
	Hispanic or Latino, 2010	5.2%
	Other, 2010	5.3%
	Language other than English spoken at home, percent of persons age 5+ years, 2009–13	10.7%
	Median household income (in 2013 dollars)	\$46,631
	Total number of charter schools (SY 2012–13)	25
	Total charter school enrollment (SY 2012–13)	13,429

Source: Authors' calculations and census data from www.census.gov/quickfacts/table/PST045214/2622000,4748000,3410000.

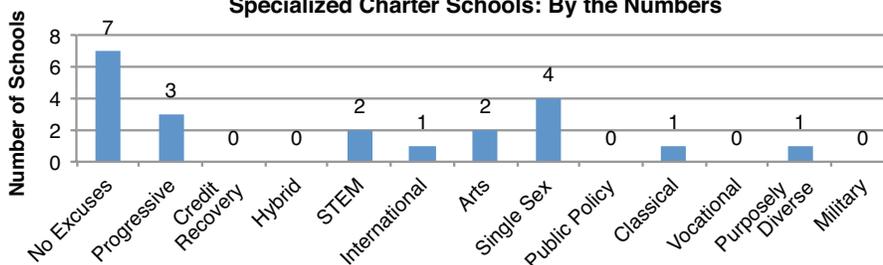
Types of Charter Schools



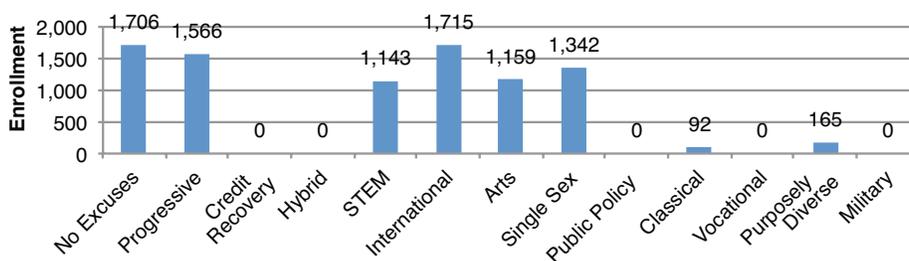
Charter School Enrollment by Type



Specialized Charter Schools: By the Numbers



Enrollment in Specialized Charter Schools



Source: Authors' calculations.

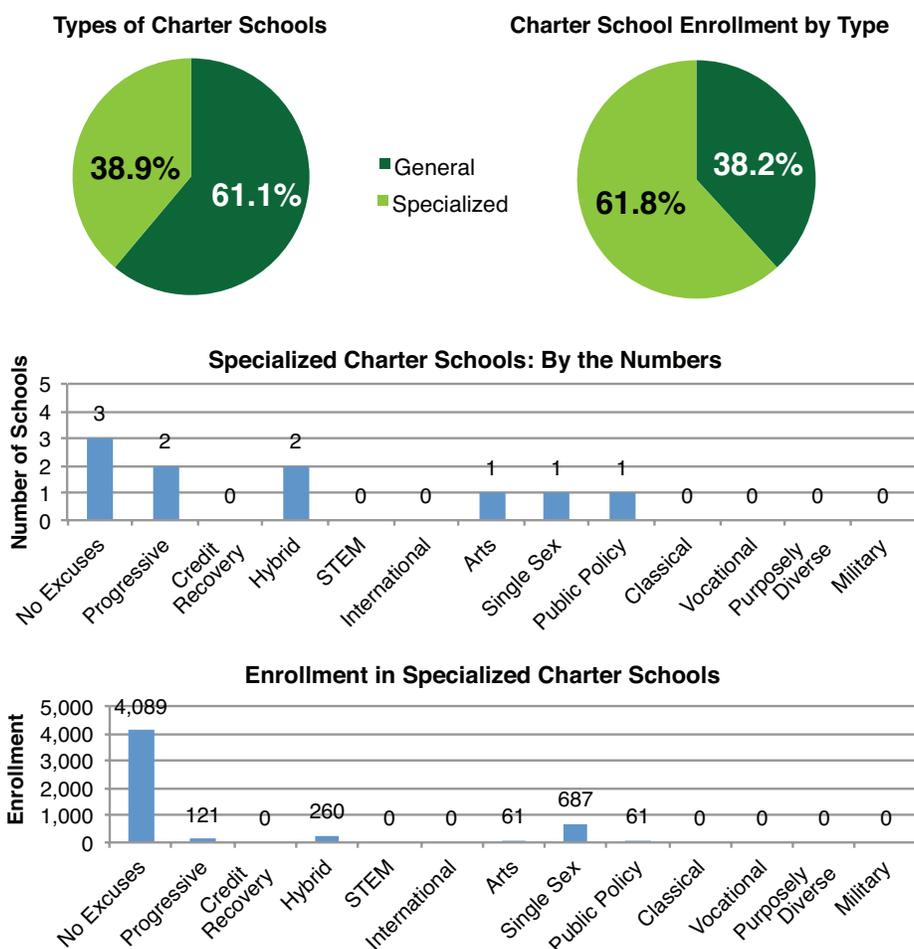
Of Atlanta's 15 specialized charter schools, 7 are no-excuses schools. But these seven schools combined serve as many students as Atlanta's lone international

school, a high school with 1,715 students. Atlanta also has four single-sex schools and three progressive schools, but no hybrid schools.

FIGURE 14
NEWARK, NEW JERSEY

City-Level Demographics	White alone, not Hispanic or Latino, 2010	11.6%
	Black alone, 2010	52.4%
	Hispanic or Latino, 2010	33.8%
	Other, 2010	6.0%
	Language other than English spoken at home, percent of persons age 5+ years, 2009–13	45.4%
	Median household income (in 2013 dollars)	\$33,960
	Total number of charter schools (SY 2012–13)	18
	Total charter school enrollment (SY 2012–13)	8,214

Source: Authors' calculations and census data from www.census.gov/quickfacts/table/PST045214/2622000,4748000,3410000.



Source: Authors' calculations.

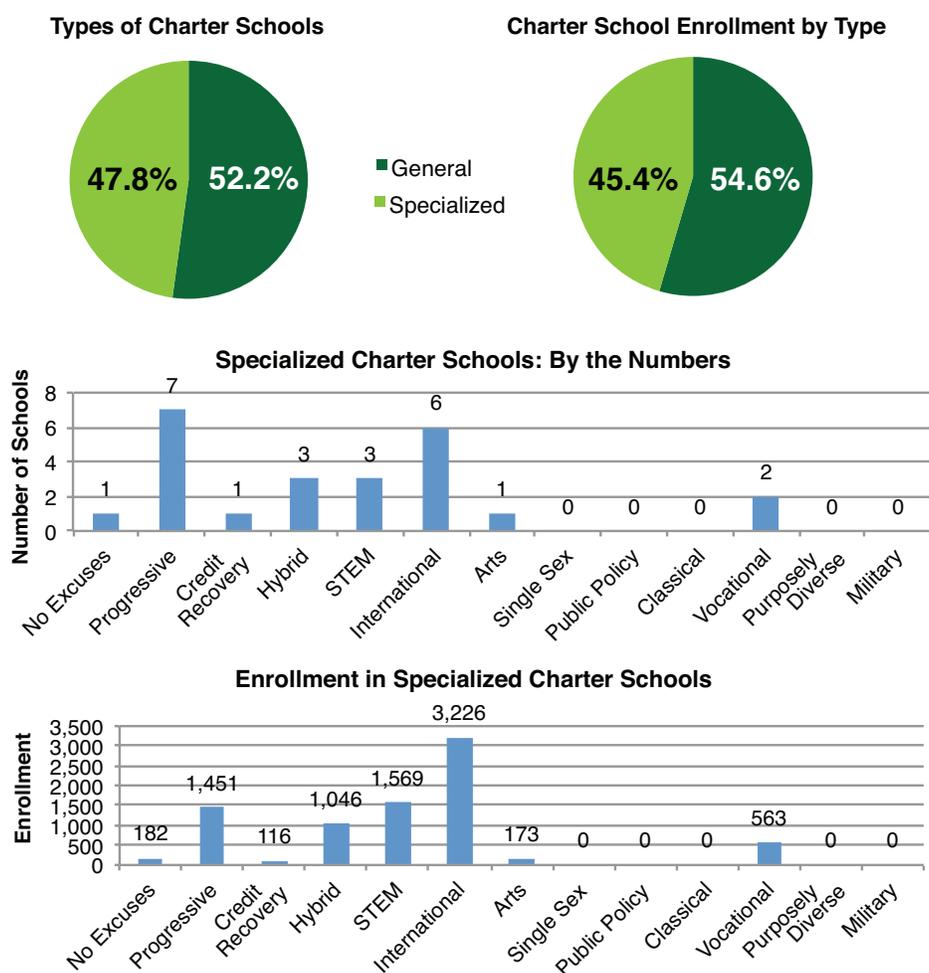
Newark has 18 charter schools, of which 11 are general schools. Of the few specialized options available, no-excuses schools enroll the most students—more than 4,000, nearly 3,500 more than the next most common option. In fact, no-excuses schools enroll

half of all charter school students in the city. By contrast, progressive and hybrid schools, which both enroll many students nationwide, combine to enroll less than 5 percent of Newark's charter school students.

FIGURE 15
MILWAUKEE, WISCONSIN

City-Level Demographics	White alone, not Hispanic or Latino, 2010	37.0%
	Black alone, 2010	40.0%
	Hispanic or Latino, 2010	17.3%
	Other, 2010	7.7%
	Language other than English spoken at home, percent of persons age 5+ years, 2009–13	19.3%
	Median household income (in 2013 dollars)	\$35,467
	Total number of charter schools (SY 2012–13)	46
	Total charter school enrollment (SY 2012–13)	17,706

Source: Authors' calculations and census data from www.census.gov/quickfacts/table/PST045214/2622000,4748000,3410000.



Source: Authors' calculations.

The most common types of specialized charter schools in Milwaukee are progressive and international schools, with seven and six schools, respectively. But the international schools collectively enroll more than twice as many students—more than 3,200—as the

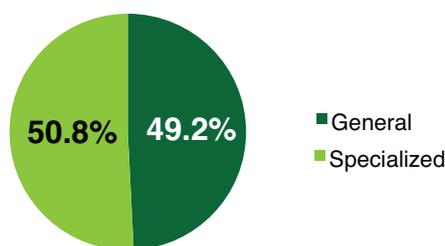
progressive schools. The three STEM schools in Milwaukee also enroll slightly more students than the progressive schools, 1,569 versus 1,451. Milwaukee does have hybrid schools and a single no-excuses school, but these schools enroll relatively few students.

FIGURE 16
PHOENIX, ARIZONA

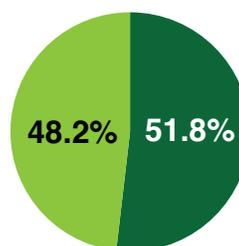
City-Level Demographics	White alone, not Hispanic or Latino, 2010	46.5%
	Black alone, 2010	6.5%
	Hispanic or Latino, 2010	40.8%
	Other, 2010	9.2%
	Language other than English spoken at home, percent of persons age 5+ years, 2009–13	36.3%
	Median household income (in 2013 dollars)	\$47,139
	Total number of charter schools (SY 2012–13)	126
	Total charter school enrollment (SY 2012–13)	39,349

Source: Authors' calculations and census data from www.census.gov/quickfacts/table/PST045214/2622000,4748000,3410000.

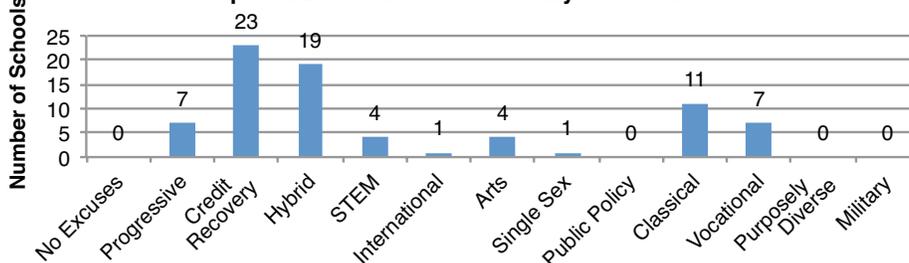
Types of Charter Schools



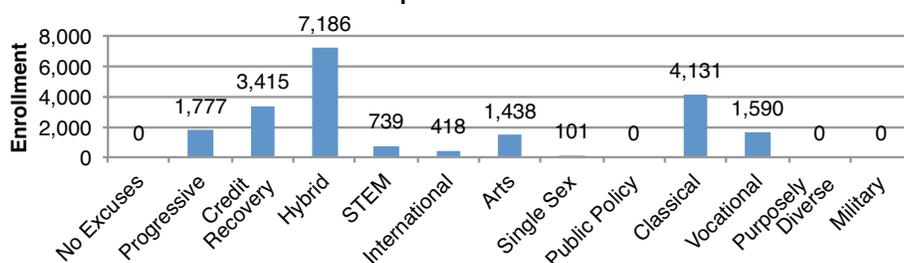
Charter School Enrollment by Type



Specialized Charter Schools: By the Numbers



Enrollment in Specialized Charter Schools



Source: Authors' calculations.

Phoenix has 23 credit-recovery schools, the most of any city surveyed, and these schools enroll almost 3,500 students. Other common types of charter schools in Phoenix are hybrid (19) and classical schools (11). The hybrid schools collectively enroll the most students:

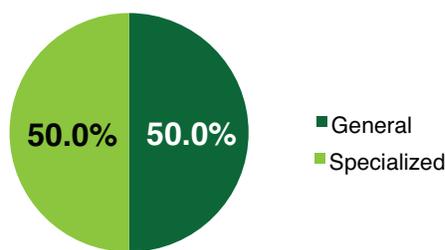
7,186, or just over 18 percent of Phoenix charter school students. The classical schools together enroll another 10 percent. But, unlike many cities sampled, Phoenix lacks even a single no-excuses school, despite having 126 charter schools in the area.

FIGURE 17
CHICAGO, ILLINOIS

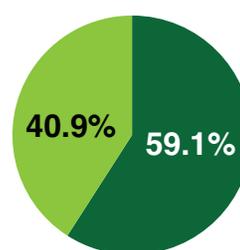
City-Level Demographics	White alone, not Hispanic or Latino, 2010	31.7%
	Black alone, 2010	32.9%
	Hispanic or Latino, 2010	28.9%
	Other, 2010	8.7%
	Language other than English spoken at home, percent of persons age 5+ years, 2009–13	35.8%
	Median household income (in 2013 dollars)	\$47,270
	Total number of charter schools (SY 2012–13)	117
	Total charter school enrollment (SY 2012–13)	49,972

Source: Authors' calculations and census data from www.census.gov/quickfacts/table/PST045214/2622000,4748000,3410000.

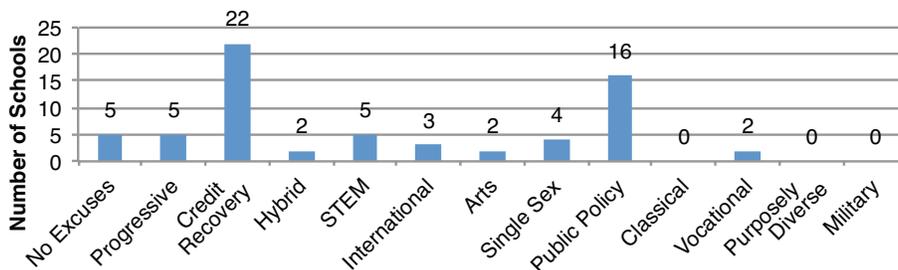
Types of Charter Schools



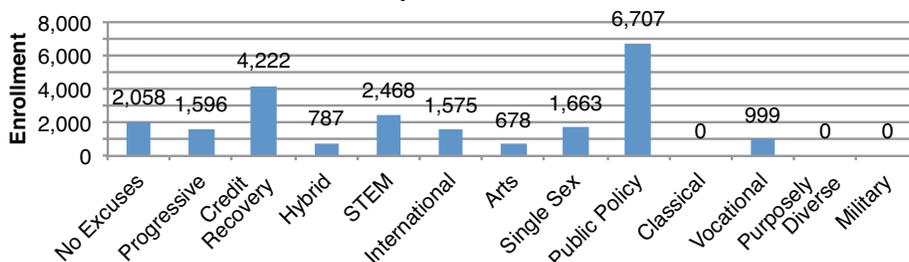
Charter School Enrollment by Type



Specialized Charter Schools: By the Numbers



Enrollment in Specialized Charter Schools



Source: Authors' calculations.

Chicago, home to roughly equal proportions of white, black, and Hispanic or Latino residents, has nearly 50,000 students enrolled in charter schools. Many of these students attend credit-recovery (22 schools) or public policy schools (16 schools). In fact,

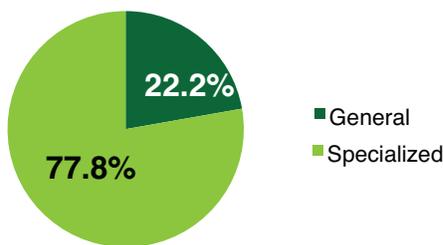
public policy schools enroll 13.4 percent of Chicago's charter school students. Another 59 percent of charter school students attend general schools, even though only half of charter schools in the city are general schools.

FIGURE 18
ALBANY, NEW YORK

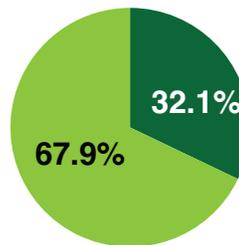
City-Level Demographics	White alone, not Hispanic or Latino, 2010	54.0%
	Black alone, 2010	30.8%
	Hispanic or Latino, 2010	8.6%
	Other, 2010	9.1%
	Language other than English spoken at home, percent of persons age 5+ years, 2009–13	15.7%
	Median household income (in 2013 dollars)	\$40,287
	Total number of charter schools (SY 2012–13)	9
	Total charter school enrollment (SY 2012–13)	2,710

Source: Authors' calculations and census data from www.census.gov/quickfacts/table/PST045214/2622000,4748000,3410000.

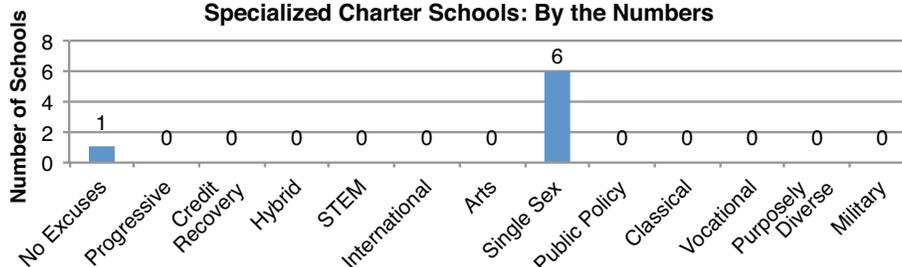
Types of Charter Schools



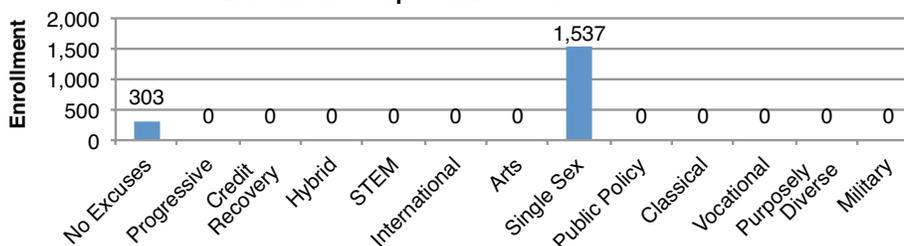
Charter School Enrollment by Type



Specialized Charter Schools: By the Numbers



Enrollment in Specialized Charter Schools



Source: Authors' calculations.

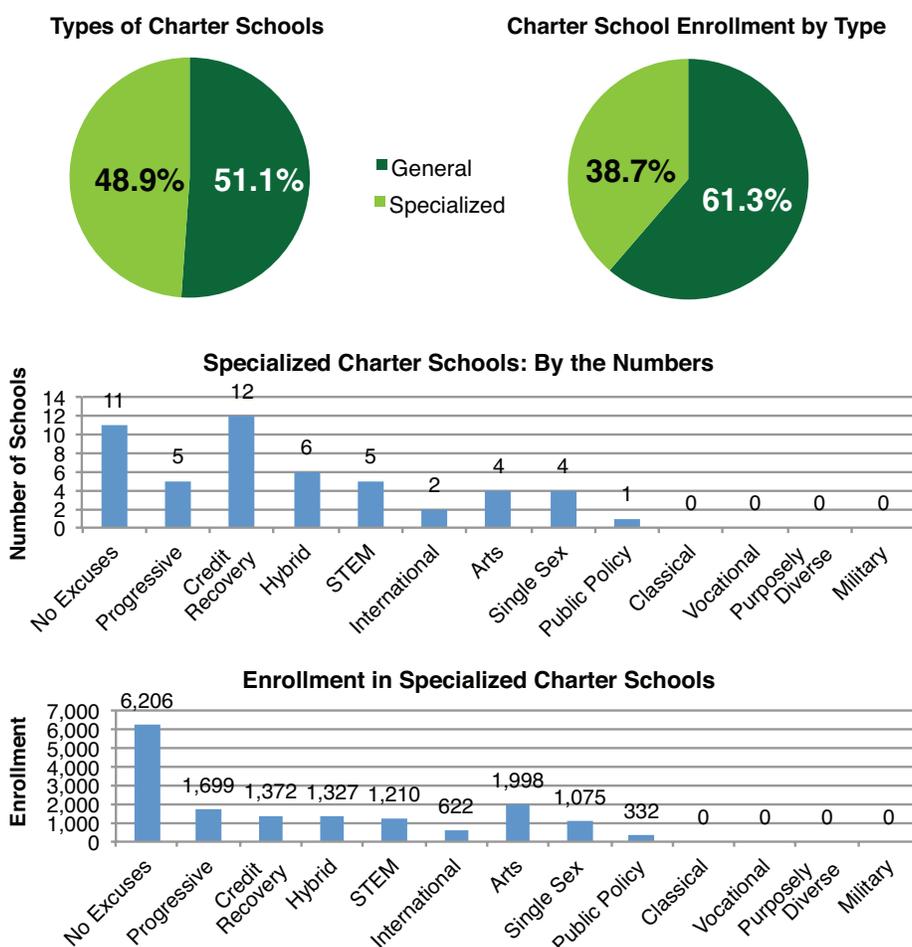
Albany is home to only nine charter schools, which together enroll 2,710 students. Two of those schools are general schools, one is a no-excuses school, and six are single-sex schools. However, the general schools tend

to enroll slightly more students than the specialized schools, such that 32 percent of Albany's charter school students are in general schools.

FIGURE 19
DETROIT, MICHIGAN

City-Level Demographics	White alone, not Hispanic or Latino, 2010	7.8%
	Black alone, 2010	82.7%
	Hispanic or Latino, 2010	6.8%
	Other, 2010	3.7%
	Language other than English spoken at home, percent of persons age 5+ years, 2009–13	9.6%
	Median household income (in 2013 dollars)	\$26,325
	Total number of charter schools (SY 2012–13)	90
	Total charter school enrollment (SY 2012–13)	38,164

Source: Authors' calculations and census data from www.census.gov/quickfacts/table/PST045214/2622000,4748000,3410000.



Source: Authors' calculations.

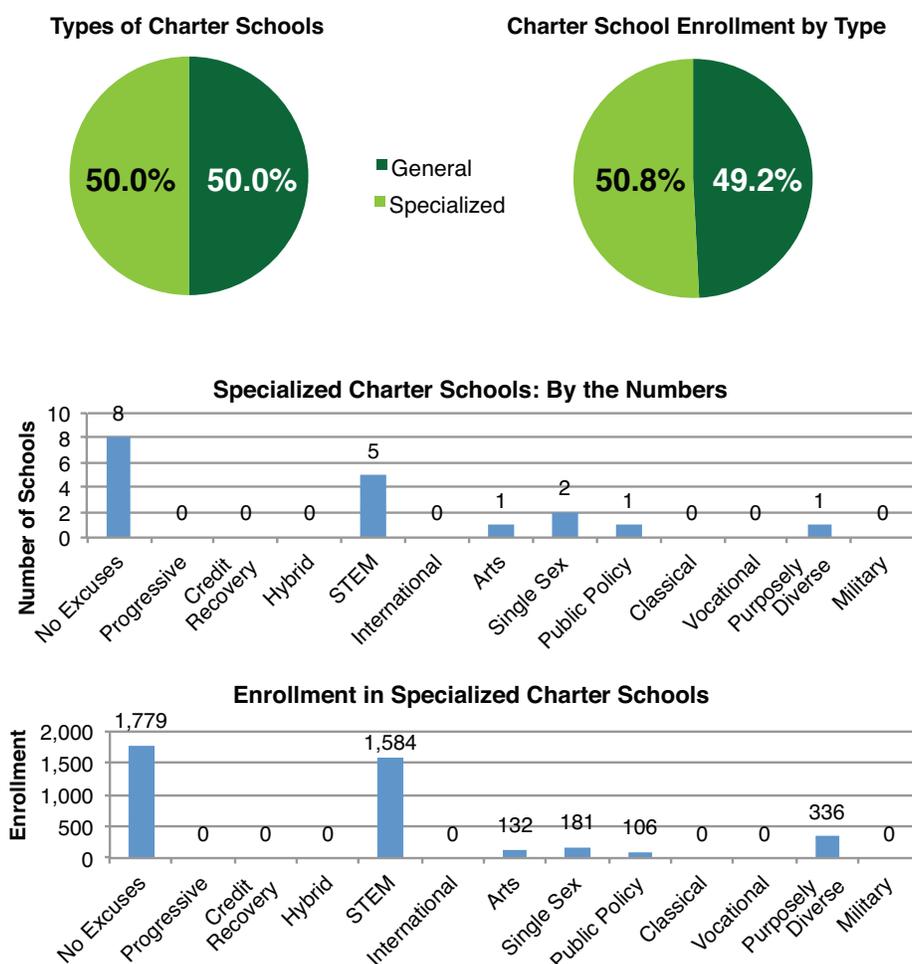
Detroit has 90 schools, 46 of which are general schools. Another 23 are no-excuses or credit-recovery schools. General schools enroll 61.3 percent of Detroit's charter school students, and no-excuses schools enroll another 16.3 percent. Detroit's four arts schools also

enroll a relatively large number of students (5.2 percent). Detroit has the second-lowest median household income of the 17 cities surveyed, at roughly half the national median, and the largest proportion of black residents, at nearly 83 percent.

FIGURE 20
MEMPHIS, TENNESSEE

City-Level Demographics	White alone, not Hispanic or Latino, 2010	27.5%
	Black alone, 2010	63.3%
	Hispanic or Latino, 2010	6.5%
	Other, 2010	3.2%
	Language other than English spoken at home, percent of persons age 5+ years, 2009–13	9.1%
	Median household income (in 2013 dollars)	\$36,912
	Total number of charter schools (SY 2012–13)	30
	Total charter school enrollment (SY 2012–13)	7,059

Source: Authors' calculations and census data from www.census.gov/quickfacts/table/PST045214/2622000,4748000,3410000.



Source: Authors' calculations.

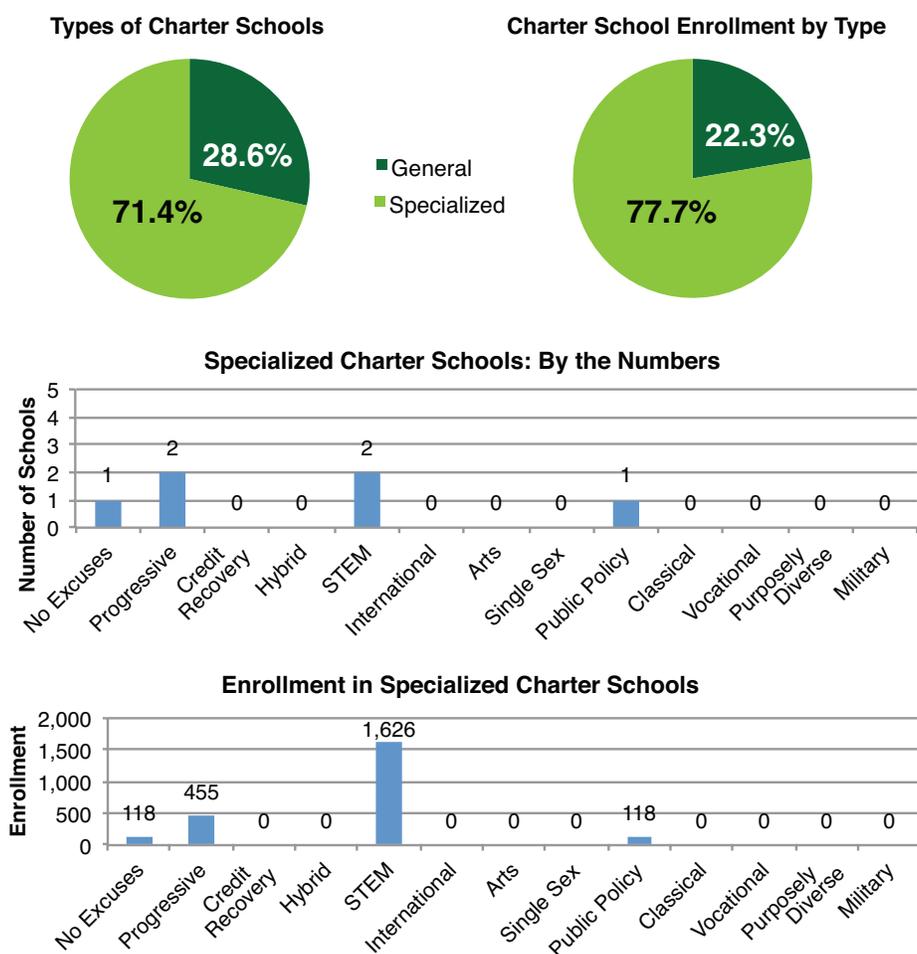
Memphis has 30 charter schools, but less than half as many students are enrolled as in Indianapolis, which is home to 29 charter schools. About half of Memphis charter school students are in general schools, another

quarter are in no-excuses schools, and just over a fifth are in STEM schools. Memphis has no progressive, hybrid, or international charter school options.

FIGURE 21
CAMDEN, NEW JERSEY

City-Level Demographics	White alone, not Hispanic or Latino, 2010	4.9%
	Black alone, 2010	48.1%
	Hispanic or Latino, 2010	47.0%
	Other, 2010	6.8%
	Language other than English spoken at home, percent of persons age 5+ years, 2009–13	43.9%
	Median household income (in 2013 dollars)	\$26,202
	Total number of charter schools (SY 2012–13)	7
	Total charter school enrollment (SY 2012–13)	2,831

Source: Authors' calculations and census data from www.census.gov/quickfacts/table/PST045214/2622000,4748000,3410000.



Source: Authors' calculations.

Camden, the city with the lowest median income of our sample, has only seven charter schools. Two are general schools, two are STEM schools, two are progressive schools, and one is a no-excuses school. The STEM schools enroll by far the most students—1,626,

or 57.4 percent of all Camden charter school students. Another 22.3 percent of charter school students are in general schools, and 16 percent are in progressive schools. Ninety-five percent of Camden residents are black or Hispanic or Latino.

TABLE 2
CHARTER AUTHORIZERS BY CITY, TYPE, AND NUMBER

	Number of Authorizers	LEAs	SEAs	ICBs	NFPs	HEIs	NEGs
Minneapolis	20	1			11	8	
Detroit	12	1				11	
Indianapolis	5					4	1
New York	3	1	1			1	
Milwaukee	3	1				1	1
Phoenix	3		1	1		1	
Denver	2	1		1			
Albany	2		1			1	
Los Angeles	2	1	1				
Atlanta	2	1		1			
Chicago	2	1		1			
Memphis	2	1		1			
New Orleans	2	1	1				
Washington, DC	1			1			
Boston	1		1				
Newark	1		1				
Camden	1		1				

Source: National Alliance for Charter School Authorizers online database of charter school authorizers.

Policy Context

Looking at the city-by-city breakdown, a first question might be, do differences in these cities drive differences in the composition of their charter schools? Are there important policy differences? Are there demographic characteristics that explain some of the variation?

These are difficult questions to answer by looking at only 17 cities. A lot of things make Albany different from Los Angeles. That said, a couple of differences are worth exploring.

Authorizers. On the policy front, one of the big differences between these cities is who is able to authorize charter schools. Charter school authorizers are the conduits of public dollars. Prospective charter school operators apply to authorizers, who then either allow them to enter the marketplace or deny them.

Both the number and types of groups that are able to authorize charter schools vary substantially among states. According to the National Association of Charter School Authorizers, authorizers fall into one of six

general types: local education agencies (LEAs), state education agencies (SEAs), independent charter boards (ICBs), not-for-profit groups (NFPs), higher-education institutions (HEIs), and noneducational government entities (NEGs).⁷

In the 17 cities in our sample, Minneapolis and Detroit had, by far, the largest number of organizations that were able to authorize schools in their cities. Minnesota (home to the first charter schools) allows both higher-education institutions and not-for-profit groups to authorize charter schools in Minneapolis, and Michigan allows numerous higher-education institutions to authorize schools in Detroit. Table 2 maps out the number of each type of authorizer working in each city.

There is a small positive correlation ($r = 0.135$) between the number of authorizers and the number of students enrolled in specialized charter schools. In other words, cities with more authorizers tend to enroll slightly more students in specialized charter schools. If we only look at the number of non-LEA authorizers, that correlation gets larger ($r = 0.188$).

TABLE 3
CORRELATION BETWEEN ENROLLMENT BY SCHOOL TYPE AND CITY CHARACTERISTICS

	City Median Income	City Percent Black	City Percent Hispanic	Percentage of Families That Speak a Foreign Language at Home
Enrollment in Specialized Schools, Overall	-0.394	0.058	0.012	-0.143
Enrollment in Progressive Schools	0.030	0.075	0.365	0.340
Enrollment in STEM Schools	-0.416	0.150	0.400	0.185
Enrollment in Hybrid Schools	-0.009	-0.316	-0.007	-0.076
Enrollment in No-Excuses Schools	-0.272	0.491	-0.110	0.024
Enrollment in International/Foreign Language Schools	0.355	-0.162	-0.307	-0.256

Note: Correlations calculated as Pearson's r coefficients.

Source: US Census Bureau QuickFacts database, www.census.gov/quickfacts/table/PST045214/2622000,4748000,3410000.

Demographics. Demographic differences in communities might play a role as well. We looked at three variables and how they relate to the number and type of specialized options available in the 17 charter school markets we studied. Table 3 shows the relationship between various demographic characteristics of a city and the number of students enrolled in specialized schools.

Looking first at the relationship between a city's median income and student enrollment in any specialized schools, we observe a medium-sized negative correlation ($r = -0.394$). That is, the wealthier a city, the less likely it is to have specialized schools.

To better understand this, we estimated the relationship between median income and each specialized school type. There is almost no relationship between a city's median income and the percentage of students enrolled in progressive schools ($r = 0.030$), but there is a medium-sized negative correlation ($r = -0.272$) between a city's median income and percentage of students in no-excuses schools. That is, the richer a city, the fewer students are in no-excuses schools. The strongest relationship we observe is a medium-to-large negative relationship ($r = -0.416$) between a city's median income and the number of students enrolled in STEM schools. The wealthier a city, the smaller the number of students in STEM schools. There is essentially no relationship ($r = -0.009$) between a city's median income and the number of students enrolled in hybrid or online schools.

We also wanted to look at the relationship between the racial profile of a city and student enrollment in no-excuses schools. No-excuses schools have been labeled—derisively, in this case—as having “perfected the ‘formula’ for student success—at least for poor, black and brown kids anyways.”⁸ Our previous analysis found that the poorer a city, the more children are enrolled in no-excuses schools, but we also find a positive correlation ($r = 0.491$) between the percentage of the city's population that is black and the percentage of students that are in no-excuses schools. There is a small negative correlation between the percentage of the city's population that is Hispanic and the percentage of students in no-excuses schools ($r = -0.110$).

Finally, we wanted to dig into international and foreign language schools. We surmised that cities that had more international residents would want more international schools. As a measure of international individuals, we used census data on the percentage of households that speak a language other than English at home. Interestingly, we found a medium-sized *negative* correlation ($r = -0.256$) between the percentage of households that speak a foreign language at home and enrollment in international schools, suggesting that there is actually less demand for international and foreign language schools in cities with sizable international populations.

We also looked at the relationship between median income and the percentage of students in international

and foreign language schools, and the picture became clearer. The medium-sized *positive* correlation ($r = 0.355$) shows that wealthier cities tend to have more international and foreign language schools. Insofar as speaking a foreign language at home is correlated with poverty, it appears that economics trumps native language in determining demand for international and foreign language schools.

These are small-sample correlational analyses of complex environments, but they do raise some interesting questions about how charter school marketplaces get to be the way they are.

The Market Itself. Two factors that might shape the composition of the charter school marketplace are its age and market share. If diversification is a consequence of maturity, then older markets should be more diverse. Maturity can also be measured by the amount of penetration charter schools have had in the marketplace, so larger markets should see more diversity as well.

When we measure the relationship between the maturity of the sector and the percentage of students enrolled in specialized charter schools, we find two contradictory findings, which are displayed in table 4.

There is a small positive correlation between the size of the charter school market share and enrollment in specialized schools and a medium-sized negative correlation between the age of a city's charter market and enrollment in specialized schools. We would caution the reader not to overly interpret these findings, though, as outliers are particularly influential with these estimates. (Excluding New Orleans from the analysis, for example, changes the correlation between market share and specialized enrollment to 0.219. Such is the issue of having a sample size of 17.)

Intermediary Institutions. Another factor that might shape the composition of a charter school marketplace is the growing number of intermediary institutions that work in cities and states to incubate and scale charter schools. If incubators and accelerators see promoting diversity of offerings as a central mission of their organization, we might expect to see more diverse offerings in cities where they are located. It is much more difficult to estimate the effect of these institutions empirically, given the small

TABLE 4
CORRELATION BETWEEN ENROLLMENT IN
SPECIALIZED SCHOOLS AND AGE AND MARKET
SHARE OF CHARTER SCHOOLS

	Enrollment in Specialized Schools
Market Share	0.107
Age of Charter Market	-0.309

Source: National Alliance for Public Charter School's data dashboard for market share figures; Google search for founding date of the first charter school in the city.

number of them around the country, so we instead decided to interview the leaders of several organizations to ask them how they see their organizations as shaping the marketplace.

Quality First. In every interview we conducted, the first question we asked was simple and straightforward: "Is promoting diverse offerings a goal of your organization?"

Our interviewees said that their primary interest is quality and that diversity of offerings was a secondary or even tertiary concern. "We don't have a particular goal or type or balance in mind," Kaitlyn Walker, manager of strategic initiatives at Indianapolis's The Mind Trust, told us. "If we start to put expectations on schools, we encroach on their autonomy." Her thoughts were echoed by Michael Stone, CEO of New Schools for New Orleans, who told us, "The entrepreneur needs to develop their own vision. It's not up to us."

This drive for quality stems from a simple reality: in the cities where these organizations work, there are not enough quality seats of any type for the students who live there. These organizations are not in the position of turning away schools because there are too many no-excuses or Montessori schools already operating. If a school can get results for kids, it will get support.

Institutional Isomorphism. Although the charter school sector has been evolving and new models are starting to get a foothold in the marketplace, certain school models have stuck. No-excuses schools have been the dominant model in most urban communities, as our analysis

shows. They hold this central position for a simple reason: they work.

Schools like KIPP and YES Prep have a track record of success and thus draw philanthropic dollars, political support, and organizations that want to scale their models. There are teacher- and leader-preparation programs to help people lead no-excuses schools, research findings supporting them, and high-profile advocates. This makes starting a no-excuses school much, much easier. It is harder to show up with a break-the-mold model.

Political scientists refer to this phenomenon as “institutional isomorphism”—that is, the tendency for organizations to look alike. Being innovative is hard. Starting a school that looks totally unlike the dominant model puts leaders out on a limb, both in terms of operating and supporting the school. It is much easier to keep doing what has been done before. This is why we see a large number of no-excuses and STEM schools in low-income communities. Parents, civic leaders, and school operators see these as lower-risk propositions.

All of that said, parental demand appears to be chiseling away at the conservative tendencies of institutional isomorphism.

Goal Evolution. In some cities, the makeup of the market is changing because the goals of parents are changing. After parents see an opportunity for a quality education, or even have multiple options for a quality education, their priorities start to change. Then, not only do many families want a quality education, but they also want particular subject-matter instruction or a particular ethos.

Justin Testerman of the Tennessee Charter School Center explained that, at first, Tennessee’s charter law restricted charter schools to students who were zoned into failing schools or struggling academically. This limited the pool of students who were able to choose charter schools to predominantly low-income and minority students. As the laws changed and the sector matured, though, the number and type of families who have access to charter schools changed as well. Now families are looking for more diverse options, including schools that purposely integrate students from a variety of socioeconomic backgrounds and that offer unique pedagogical approaches.

All of our interviewees believed that, looking into the future, the more the sector matures and is able to provide quality seats for students, the more that families will push for diversity in offerings in addition to quality.

Discussion of Potential Explanations

How can we make sense of both these empirical findings and these interviews with organizations working in charter markets today? We offer three overarching explanations.

Maslow’s Hierarchy of Charter Schools. In their book, *The School Choice Journey*, Thomas Stewart and Patrick Wolf argue that when looking for schools, parents tend to follow Abraham Maslow’s hierarchy of needs.⁹ They first look for a school that is safe, then a school with generally strong academics, and then a school with some of their desired specializations. If a school isn’t safe, it doesn’t matter if it matches their preferences for pedagogy or curriculum; parents don’t want to send their kids there.

It appears that charter markets group along Maslow’s hierarchy of needs as well. In low-income and minority communities, the primary concern is having a school with a quality educational program. This explains why we see relatively strong correlations between enrollment in no-excuses schools and both median income (negative correlation) and the percentage of the population that is black (positive correlation).

But, as communities get wealthier, their tastes change. We see a positive correlation, for example, between median income and international or foreign language schools. The number of foreign language or international schools is not driven by the percentage of the population that is international; rather, wealthier families drive the creation of these schools.

Interestingly though, overall, there is a negative correlation between median income and specialized schools. Perhaps families in wealthier communities are simply looking for a solid, all-around education and don’t have preferences for a particular pedagogical or curricular focus. It is also possible that there is simply an upper limit on the number of families that want a specialized education.

Lagging Indicators. It should also be noted that, while our data on charter schools are as comprehensive as we could assemble, they are a couple of years old. If diversity is a function of maturity in the marketplace, it could be the case that it is simply too early to judge this using the data that are currently available.

Interestingly, though, we find that the longer charter schools are in a community, the less likely they are to be specialized. Now, part of this might pair with the findings of increased income driving more general options—that specialization is a niche space and the longer schools are around, the more general purpose they become. But it is also true that there is simply not a lot of variation in the age of charter sectors, which affects the estimates.

It is interesting that we find a correlation between the size of the market itself and the proportion of students enrolled in specialized schools. This would appear to tell us something that we think makes intuitive sense: as the market grows, so does the space for specialized options.

But there is also something to be said about the time it takes to start a charter school. Charter application processes vary greatly in their complexity and in the time it takes to complete them.¹⁰ They privilege established actors with the capacity to replicate their models, so it is harder for the mom-and-pop specialized schools to get into the game. That would lead us to see concentrations of certain established models and fewer unique specialized options over time.

Isomorphism. This brings us back to something that came up repeatedly in interviews: institutional isomorphism. One of the most interesting findings we came across was the substantial negative correlation between enrollment in STEM schools and median household income. In other words, the poorer a city is, the larger its expected STEM enrollment is.

STEM schools are low-risk propositions. Careers in STEM fields are nearly guaranteed pathways into solid jobs, STEM subjects feature prominently in standardized tests, and there is a great deal of industry and philanthropic support for STEM programs. Few people today say that we are doing enough to prepare students, particularly low-income and minority children, in the STEM fields.

Many charter operators and authorizers are particularly risk averse when serving low-income students because they do not want to “experiment” with kids who already have the odds stacked greatly against them. This leads them to want to use established models and accepted practices. We have already discussed the no-excuses model as a prime example of this, but STEM is an incarnation as well. No-excuses and STEM models feel like sure things, or at least surer things than other models out there, making authorizers more amenable to authorizing them and operators more amenable to using them.

Conclusion

In the horse-race narrative of charter school competition with public schools, it can often get lost that charter schools have a broader purpose. Their goal is not simply to produce higher reading and math scores or higher graduation rates. These are, of course, important gauges of performance, but charter schools’ broader purpose is to offer families who traditionally had few options the power to put their children in schools that will prepare them for a career in science or train them in a foreign language.

It is not unreasonable to make diversity a second-order concern behind school quality. However, it is important to note that quality does have a subjective dimension. Generally speaking, when observers talk about quality, they use standardized test scores as the primary metric. For the type of parent that wants to send his or her child to a progressive school, standardized test scores might not be a great barometer of a school’s quality. If we require all schools to perform well across one set of metrics before we think about allowing for diversity, we will most likely limit the amount of diversity that we will see. It is, of course, a value judgment as to whether or not that is a good thing, but we should be open about weighing the costs and benefits.

There is no ideal mix of schools for a given community—or, at least, there is no ideal mix that can be determined by people outside of the community. There is, though, evidence that parents want more diverse options, and there are examples of communities across the country where schools are forming to meet these

demands. Hopefully this study can be a starting point for a deeper examination of the colors and shapes of charter markets around the nation.

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