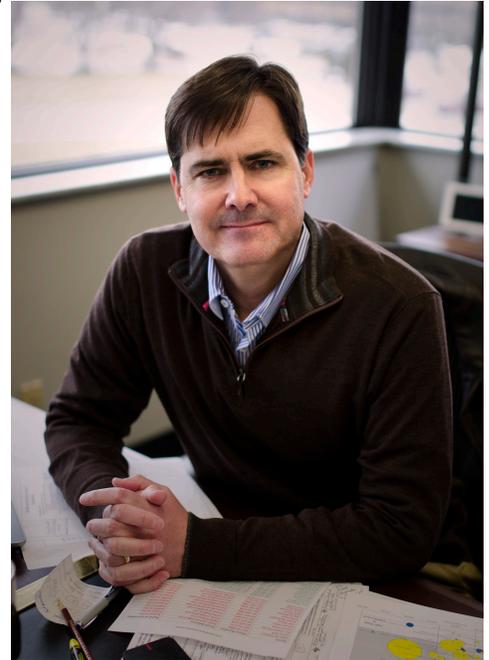


# We parsed SCALA's Bellwether report so you don't have to

The Bellwether report commissioned by a group of business, nonprofit and religious leaders quickly became a flash point over the future of Jefferson County Public Schools.

The report and [news of the controversial group](#) behind it — the Steering Committee for Action on Louisville's Agenda (SCALA) — surfaced as the community awaits Kentucky Education Commissioner Stephen Pruitt's audit recommendations, which [could include a state takeover](#) of JCPS.



Jim Lancaster

“We’re providing high-level information about state takeover and what things have led to improved performance elsewhere, given the commissioner has hinted that may be a likely outcome of the audit,” Jim Lancaster, chairman of SCALA’s education study group, told Insider in emailed comments Wednesday.

Insider reached out to Lancaster, chief executive of Lantech, after he and a group of SCALA members wrote an [Op-Ed about the need for a school district reboot in the Courier Journal](#), which identified him as chair of the education subcommittee.

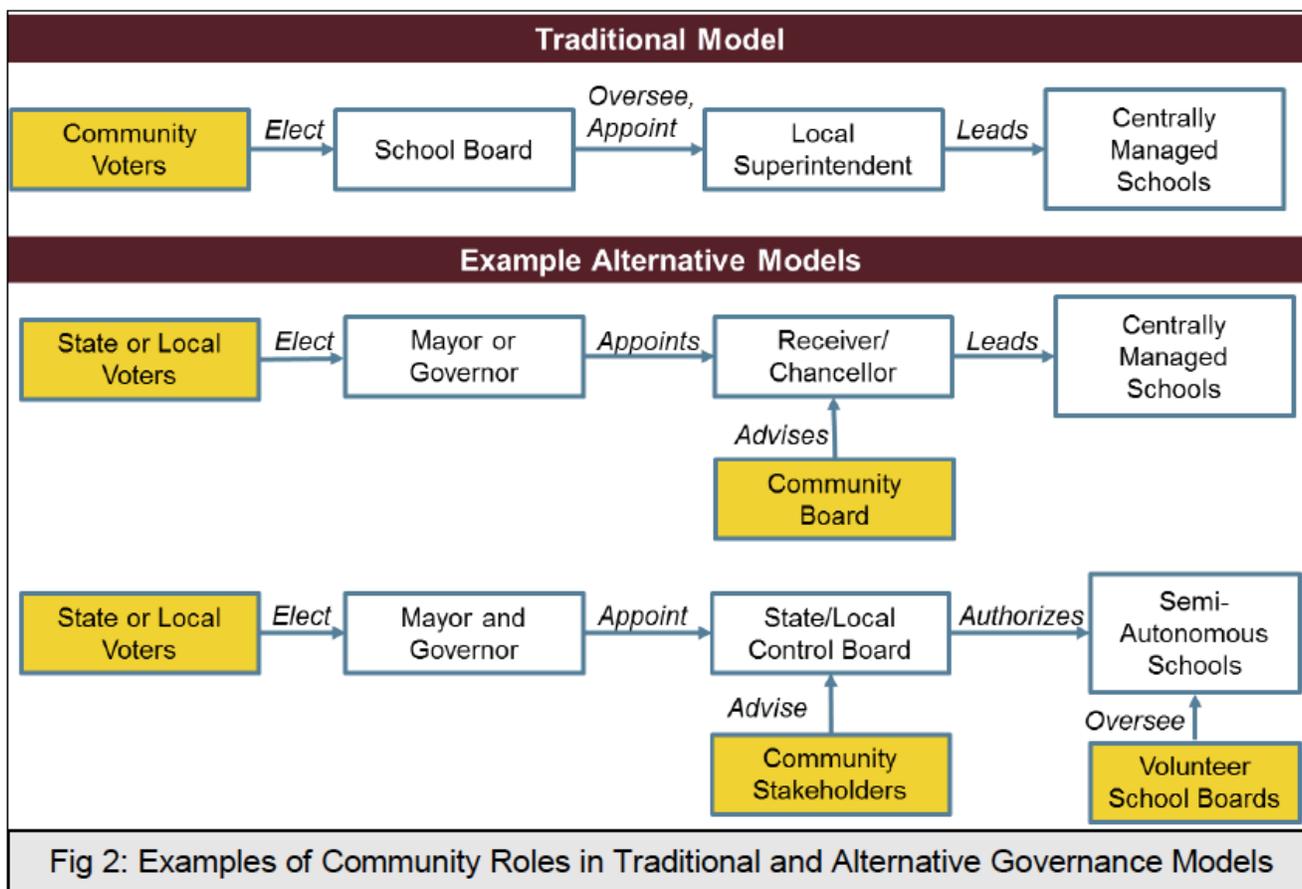
In January, SCALA founder David Jones Sr. told Insider that his son, the former school board chairman David Jones Jr., chaired or co-chaired the subcommittee. Lancaster did not respond to a question regarding Jones Jr.’s

role with the subcommittee, but said there is no formal roster. In a later email, a public relations representative for Lancaster said he has no co-chair and has held the chairmanship since at least November.

SCALA paid national nonprofit Bellwether Education Partners \$50,000 to compile [the report](#), which is a 13-page look at different school governance structures, as well as challenges within JCPS, and a three-page bibliography.

### A look at alternative governance models

The Bellwether report identified two alternative governance structures to the current JCPS model in which voters elect school board members who hire a superintendent and help oversee operation of the school district.



This flow chart shows alternative governance models. | Courtesy of Bellwether Education Partners

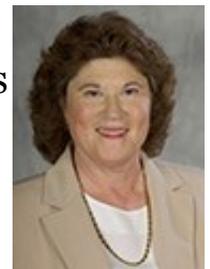
The report notes that better models could include: the mayor or governor appointing a chancellor who leads the school district and is advised by a community board, or the mayor and governor appoint a board that is advised by community stakeholders and authorizes semi-autonomous schools, which are overseen by volunteer school boards.

Shifting from an elected board to an appointed or advisory board is “done to depoliticize school oversight and create more functional and unified boards” but can cause backlash, according to the report.

When asked if the education subcommittee would lobby for a shift to an alternative governance models, Lancaster told Insider, “What we will do next depends on what happens next with the audit.”

“Our objective is to support JCPS’s ability to improve, and we will do what is necessary, when it is necessary, to fulfill that need,” Lancaster said. “Based on the report, there have been positive outcomes from alternative governance/leadership models and some failures.” The education study group “supports improved outcomes and will provide whatever support we need to ensure that any changes to our system are based on the positive outcomes in other communities.”

While the report notes that more than 90 percent of school districts have an elected school board similar to JCPS, it also raises the notion that school board election results may not reflect the will of the community because of low voter turnout.



Linda Duncan

If the elected school board is eliminated, said Linda Duncan, the District 5 representative on the school board, “you are striking at democracy at its roots.”

Chris Brady, the District 7 school board representative, questioned how

school board elections are different from any other.

“Are we going to say that congressmen and state representatives, they’re not legitimate because in off presidential year elections, there’s lower voter turnout than in presidential election years?” he asked.

With school board elections, any registered voter can cast a ballot for school board members if he or she so chooses. Under the alternative methods, voters must rely on the elected mayor and/or governor to act on their behalf.

Just over 38 percent of those who voted in the heavily democratic Jefferson County voted for Republican Gov. Matt Bevin in 2015. Just under 69 percent of Jefferson County voters cast a ballot for Mayor Greg Fischer in 2014; Fischer is up for re-election this year. As Insider reported, SCALA members and their close family members have [contributed at least \\$44,000](#) to his re-election campaign.

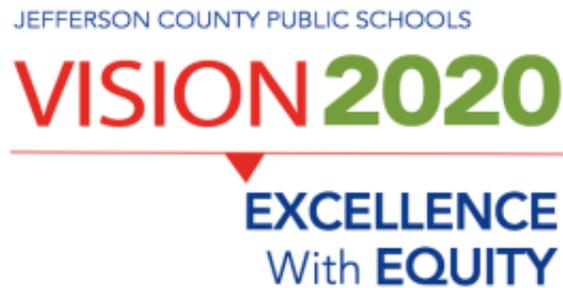
The Bellwether report lists efforts associated with long-term improvement, including having a clear vision with goals for the future and “meaningful engagement” of teachers’ unions, parents and community leaders.

Brady stated that JCPS and the school board request public input regularly.

“Do they have forums to gather stakeholder input and feedback?” Brady said referring to SCALA. “I mean, we’re doing a superintendent search. We just got done doing four open forums. We did focus group studies. We have a survey online. We have an email address you can send stuff too, and not to mention that you can contact any of the board members and our contact information is out there, and you know who the hell your board members are.”

Duncan stated that JCPS already has set goals for the future in its [Vision](#)

[2020](#) plan. “The idea that this district is not driving forward with Vision 2020 is so uninformed.”



Vision 2020 logo

Vision 2020 goals include: increasing the percentage of students who are college- and career-ready from 63 percent in 2015 to 90 percent in 2020;

reducing the number of priority, or low-achieving, schools; and raising the percentage of racially and/or ethnically diverse educators hired from 15.9 percent in 2015 to 25 percent in 2020.

In emailed comments to Insider, Lancaster indicated that the subcommittee supports Vision 2020, which was created and approved when Jones Jr., a SCALA member, chaired the school board. Jones Jr. declined to comment for this story, directing questions to Lancaster.

“We believe that lack of decisive movement on the Vision 2020 plan is holding back the district’s ability to improve the outcomes for our students,” Lancaster wrote. “In a state where incremental funding of the school system is very unlikely, the leadership of the school system must have the ability to decide what not to do, in order to fund what they need to do.”

[JCPS officials recently reported](#) that the school district’s budget is on solid footing despite proposed cuts in state funding.

Brady said school leadership, including the school board, is working to make improvements from within JCPS but needs adequate time to do so.

“Not to be too corny here, but if I was to quote the great philosophers the Beastie Boys, ‘It takes a second to wreck it. It takes time to build,’ ” he said.

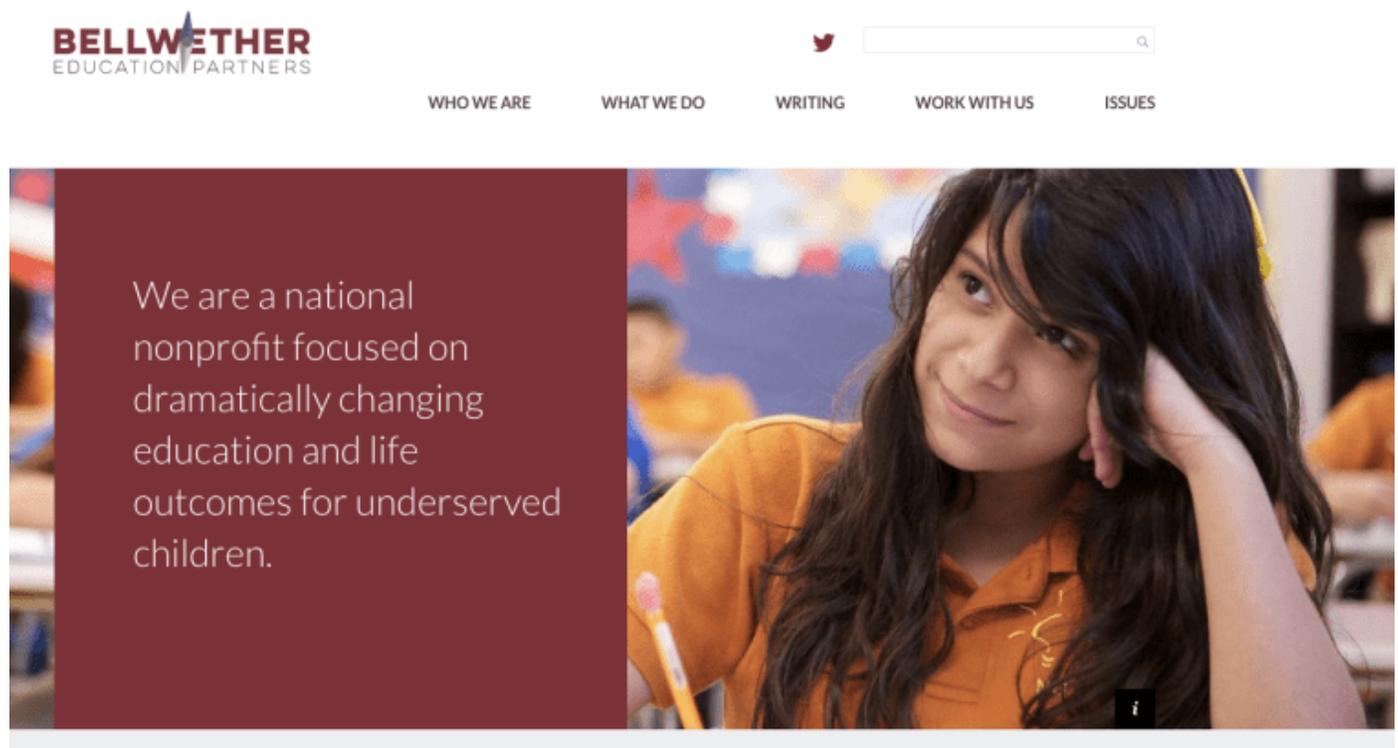
The report notes that SCALA spoke to local and state stakeholders before concluding leadership and governance changes at JCPS were needed but did not clarify who those stakeholders were.

Brady noted that it sounds as if SCALA members only talked among themselves. If that's the case, he said, "I don't think that's a really good comprehensive report."

"What stakeholders, what parent did you talk to, what student did you talk to, what teacher, what administrator, what counselor, what principal? Who did you talk to?" Brady queried.

Jones Jr. told Insider in a previous interview that he, members of SCALA, and some nonmembers had met with Commissioner Pruitt and Gov. Matt Bevin.

## Teachers unions called into question



A screenshot of Bellwether Education Partners' website

The Bellwether report lists the influence of the teachers union in elections and the current structure of the board as barriers to change.

Some leaders within SCALA, including founder David Jones Sr., [gave substantial funding](#) to the Bluegrass Fund PAC, which has acted as a counterbalance to the Jefferson County Teachers Association union in recent school board elections.

The report critiqued the scope of the school board's role in managing JCPS, including approving staff leaves of absence and hundreds of field trip requests.

“These minor decisions become time-consuming, and board members must rely heavily on staff to recommend a course of action, or take time away from more pressing strategic matters,” according to the report. It states that the “extensive and time-intensive” nature of the job deters new board candidates.

On average, voters had three candidates to choose from when school board seats came up for election in 2014 and 2016, according to the Jefferson County Board of Elections.

The report said legislative action might be needed to see substantial improvement, and Jones Jr. previously told Insider that he believes state laws, which dictate JCPS's governance structure and require the state board to micromanage, need to change.

“The problem is the state structure creates a weak superintendent hobbled by both rules and regulations and micromanaging board,” Jones Jr. said.

Lancaster said SCALA's education subcommittee has not focused on lobbying for state-level changes at this point. Lancaster also stated that the group isn't “advocating tactics” aimed at fixing JCPS's problems but simply providing

“high-level information.”

Brady questioned why SCALA isn't lobbying for state law changes since Jones Jr. and the Bellwether report have indicated that at least some of the problems lie at the state level and referred to a tweet he published on Feb. 1.

“Unless and until the state changes some of that stuff, we're just going to keep spinning our wheels locally.” [@dajonesjr](#).

Don't entirely disagree, but if U truly feel that way, then why the hell are U rooting for state takeover of [@JCPSKY](#)? Why not try to get the laws changed?

— Brady School Board (@BradyJCPSBOE) [9:06 PM - Jan 31, 2018](#)

Duncan said she disagrees with the assertion that the board is bogged down in minutia.

“The amount of contracts we do approve is not overwhelming ... and it's very informative to know how we are spending that money,” she said.

Although the report states that school-level decision-making is a key part of improving academics, it also calls increased school autonomy a “risky” endeavor for Kentucky, where principals are chosen by a district representative and a committee of teachers and parents, not by the superintendent. Principals' ability to select teachers based on measures other than seniority also is cited as a challenge for JCPS.

Duncan said that is not a major complaint she's hearing from principals.

“They are searching for systems to help support the new teachers,” Duncan said, adding that principals have praised new teachers' ability to incorporate technology into the classroom. However, new teachers can face “an

overwhelming situation” when their class is too large for a single teacher to handle, she said.

Duncan complained that the report critiques JCPS without the proper context.

It does not consider the rise in gap students, including students for which English is a second language, homeless students and those receiving free and reduced lunches, in recent years, Duncan said. When she joined the school board in 2006, the district spent \$7 million on ESL students; now, it spends \$21 million, she added.

If the state were to take over JCPS and install a state manager, the manager would not be able to suspend collective bargaining or dismiss staff “by any means other than those available to traditional school boards and superintendents,” according to the report. However, the Kentucky Board of Education could vote to remove individual local school board members or the superintendent, and the state manager would then make administrative appointments.

“If the State Board of Education were to try and remove a sitting school board member, it’d have to have a really good cause for doing so, and there is nothing that I think my colleagues, or myself for that matter, have done that would warrant that,” Brady said.

JCPS is currently wrapping up a superintendent search to replace Donna Hargens, the ousted former superintendent, and has identified two finalists: interim superintendent



JCPS Acting Superintendent Marty Pollio, left, and JCPS Board chair Chris Brady just before the start of Tuesday's meeting. | Photo by Boris Ladwig

Marty Pollio and JCPS's operational chief operations officer Michael Raisor. Both have two decades or more of education-related experience.

Brady said he hopes the state will allow the chosen superintendent to remain. "I think right now the leadership changes we have already made are moving us in the right direction."

If the state was to choose a manager, Duncan said: "I would want an absolute expert who knows the district and knows our challenges or needs, and it would have to be somebody from that background. You can't pull somebody from business and automatically expect they understand" the complex education system.

### **Other school districts cited**

The report offers four examples of school districts that underwent reforms: Washington, D.C.; Denver; Lawrence, Mass.; and Springfield, Mass.

In three of the examples, the state intervened or applied pressure in some fashion.

"The finding in this consultant's report that resonated most with me was that the big urban systems that have made progress in state intervention have been ones where the state has empowered the leader or the superintendent to lead change and also have empowered the principals to lead their schools," Jones Jr. said in a prior interview.

After the superintendent overseeing schools in Lawrence, Mass., was jailed for fraud and embezzlement, the state appointed a receiver who assumed the powers of the school board and superintendent. The receiver cut administrative staff, replaced most of the principals and suspended collective bargaining agreements.

To avoid a similar intervention, the state and local school board for Springfield, Mass., instituted an “empowerment zone,” with eight lower-performing middle schools overseen by a separate board of state and local appointees. If schools don’t meet performance standards, they could become a charter school or face staffing changes.

After making the changes in 2011, the Lawrence, Mass. school district began to outperform demographically similar districts and reported a 10 percentage point increase in graduation rates. It’s too early to know the long-term impacts of 2015 changes in the Springfield, Mass. school district, the report states.

The Bellwether report says that leaders should consider including a new charter school sector as part of any improvement plan. Some members of SCALA have [pushed for charter schools](#) in Jefferson County, but the group has not taken a formal position.

Jones Jr. told Insider that he would not have spent so much time focused the public school if he was an advocate of charter schools.



David Jones Jr.

“We’ve got to improve our public schools. We can’t just blow them up, whether by charter or resegregation or whatever things,” Jones Jr. said. “A lot of other cities have screwed this up. We’ve got to proceed effectively.”

In Washington, D.C., the city council passed a new act giving power to a chancellor who the mayor appoints, reducing the elected Board of Education of mostly an advisory role, which led to reforms such a new collective bargaining agreement, performance-based pay and charter school growth.

Early on, Washington, D.C. has been touted as a national example for reform with school Chancellor Michelle Rhee even making the cover of Time magazine for her efforts.

In an interview on Jan. 22, Jones Jr. called D.C. schools “the case study for what might work. D.C. is right now the fastest-improving urban school district.”

A week later, [The Washington Post](#) published a report, which found that roughly one-third of students who graduated from D.C. Public Schools in 2016 did not meet the requirements for graduation. According to The Post, teachers told investigators that they felt pressured to pass students by school administrators and out of fear that it would negatively affect their salaries, which are performance-based.

“Quality education in a large urban district is hard,” Lancaster said. “The fact that so many have faced intervention suggests the same thing. Doing nothing because we can’t ensure a change is 100 percent successful means we are destined to continue to fail. Trying something new, maybe even bold, is better than staying where we are.”

*Disclosure: David Jones Jr. is chair of Insider Media Group’s nonprofit board.*