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REVIEW OF *REIMAGINING LEARNING: A BIG BET ON THE FUTURE OF AMERICAN EDUCATION*

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Summary of Review

Philanthropic involvement in K-12 education is growing, and it increasingly shapes the direction of reforms pursued throughout the country. A recent report from the NewSchools Venture Fund offers a thought experiment on how philanthropists can make a “big bet” over the next decade on innovative schools—a broad category that generally includes schools with a high degree of education technology use and so-called personalized approaches to learning that likely utilize digital platforms. Unfortunately, the report fails to provide a meaningful examination of research or a thorough basis for its recommendations. This critique focuses on six key concerns regarding the report: it fails to consider human capital constraints or to sufficiently consider obstacles confronting classroom technology usage, it overlooks equity concerns and past problems with dependence on external professional services, and it ignores both the potential for disruptive reform churn and the danger of philanthropic efforts altering public education systems in undemocratic ways. For these reasons, the report’s usefulness to policy and practice is limited.



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I. Introduction

Philanthropic grants in K-12 education are growing rapidly. From 2002 to 2012, the amount granted to elementary and secondary education grew by 32 percent (adjusted for inflation).¹ Funding K-12 reforms is not a new philanthropic enterprise—a century ago, the Carnegie Corporation and Carnegie Foundation for the Advancement of Teaching promoted the adoption of Carnegie units in both universities and K-12 schools, the Ford Foundation was a primary sponsor of public interest law and litigation seeking school funding equity, and the Annenberg Foundation administered the Annenberg Challenge to improve education systems in various sites throughout the United States.² What is new, however, is a living cohort of extraordinarily wealthy individuals who are increasing their K-12 philanthropic endeavors.

Foundations like Gates, Walton, or Broad are familiar to even casual followers of education reform. Less clear may be the strategies pursued by this emerging set of relatively new funders.³ Commonly referred to as “venture philanthropy,” these funders hope to make rapid and significant progress for America’s youth. Frequently, they focus on developing social return on investment (ROI) for their philanthropic investment. The school improvement goal is admirable, and pursuit of these ends seems to increasingly utilize language looking for “big bets”—huge successes that dramatically alter the social world.

In *Reimagining Learning: A Big Bet on the Future of American Education*, a new report published by the NewSchools Venture fund (NSVF), CEO Stacey Childress and COO Meghan Amroffell propose a plan for the next decade of strategic philanthropy.⁴ The 28-page report taps into the increasing preference for huge successes and argues these gains are more likely if venture philanthropists focus their grantmaking on similar initiatives and organizations.⁵ This review examines the proposal. Ultimately, serious concerns exist about the degree to which society will be able to cash in on this big bet.

II. Findings and Conclusions of the Report

The report outlines a multi-faceted philanthropic approach to seeding and supporting “innovative schools” over the next decade. The definition of innovative schools is admittedly vague, but characteristics include an emphasis on developing student skills to support an ex-

panded definition of success (e.g. better student self-management). These schools also tailor instruction to individual needs, build strong relationships among students and teachers, optimize time and instruction, and embrace education technology (ed-tech).

The three broad funding streams advocated in the report include: creating innovative schools, supporting technology innovation, and fostering understanding of these schools and increasing the demand for them. The report argues that these areas should receive \$4 billion in philanthropic dollars over the next decade in order to support changes in 7,000 schools. This amount represents slightly less than 20 percent of the philanthropic funds that will likely be given to K-12 education over the next decade with a goal of reshaping seven percent of the nation's roughly 100,000 schools.

The report employs Everett Rogers' diffusion of innovation theory to explain how change will come about.⁶ Briefly, the theory claims that innovations will first be adopted by a very small group of innovators, approximately 2.5 percent of the population. From there, early adopters will embrace the innovation, and the process will continue until the innovation is adopted widely throughout the population. The report argues that the next decade of philanthropic funding is crucial to target the early part of this process—to support the innovators and begin the process of acceptance by the early adopters.

To begin this process of innovation and diffusion, the report suggests that \$3 billion of the total philanthropic investment be targeted to supporting innovative schools. Of this \$3 billion, \$800 million should help create 1,200 new district and charter schools, \$1.4 billion should help redesign existing schools, and \$800 million should be used to create an ecosystem of “professional services, technology platforms talent pipelines, and model providers to support the implementation and spread of innovative designs.”⁷

Six hundred million dollars should be directed toward expanded research and development (R&D) in problem-oriented ways. This R&D, the report argues, should focus on learning how to use technology to answer questions like whether we can ensure all fifth graders master fractions or how we can guarantee English language learners become fluent in speaking, writing, and reading within two years. In total, the report suggests 30 projects averaging \$18 to 20 million each over the decade will enable answers to some of these ambitious questions.

One hundred million dollars, or \$10 million each year, should go toward competitive grant-making opportunities for entrepreneurs to develop solutions to “market gaps.” These competitions, the report argues, will help develop ed-tech tools that teachers want but that are currently slow to develop.

The remaining funding should go to informing the populace about these changes and cultivating demand. One hundred fifty million dollars should fund information campaigns to promote the use of technology and educate the public about the benefits of innovative school designs. Finally, in tandem with the information campaign and mobilization, \$50 million should go to evidence generation and stories about results.⁸ The report suggests evidence must be produced rapidly, utilize rigorous quantitative work as well as illustrative quali-

tative work, and include dissemination in lay terms to ensure the public understands the evidence that demonstrates working models.

The report concludes by estimating return on investment (ROI). In total, the report asserts that a conservative estimate yields an expected 200 percent return on the \$4 billion investment. ROI is further discussed below.

III. The Report's Rationale for its Findings and Conclusions

The report most resembles a thought experiment. Therefore, the report's arguments are primarily based on assumptions stemming from NSVF's previous work combined with Rogers' theory of innovation diffusion. Rationales for figures are infrequently or weakly articulated. For example, the report assumes costs for creating and redesigning schools but does not provide a detailed explanation about how these figures were derived. The report also references campaigns to reduce teen pregnancy and ensure gay rights in its argument for \$150 million directed toward mobilizing a coalition for policy change. It looks toward these campaigns as successfully altering public opinion, developing political coalitions, and influencing policy change. This discussion lacks support—both for the amount needed and for the assumption of success. It also fails to acknowledge many substantive differences in achieving policy change in areas with more clearly defined goals (teen pregnancy) and where primary victories came through litigation (gay rights).

Although a highly detailed discussion would not fit in such a thought experiment, the origins and support for figures throughout the report are inadequate.

IV. The Report's Use of Research Literature

The report makes minimal use of research literature. Perhaps due to the thought experiment nature of the report, the only place it seems to rely on research is in its calculation of return on investment. In this calculation, the report borrows from a RAND Corporation evaluation and work that translates effect sizes into a more digestible “days of learning” figure.⁹ Although one should not expect extensive use of research literature in this type of format, the omission of Larry Cuban's work seems especially glaring due to his writing both on philanthropy's ability to change schooling and technology use in classrooms—both of which are discussed in section VI below.

V. Review of the Report's Methods

The report does not apply rigorous research methods and instead provides a general overview of various arguments and figures. These figures may be plausible, but the explanations and evidence are insufficient to render a firm conclusion about their validity.

The report does include a concerted effort in its appendix to describe its return on investment calculation. The ROI estimate recalculates achievement test gains from a RAND study of 62 schools serving 11,000 students and although the result used in the report is a conservative estimate of potential impacts, it is unclear why the report proceeds in this way.¹⁰ As the report clearly states: the goal of this philanthropic focus is to create a system where seven percent of all schools are “innovative”—or, 7,000 schools with 3.5 million students.¹¹ However, only vague statements support the assumption that these 7,000 schools will resemble those in the RAND study or that their effectiveness in raising student achievement will be remotely comparable. The eventual ROI calculation assumes an effect 30-75 percent as large as those schools saw in the RAND study, but support for this assumption is scant. As with other flaws, this may be expected in the context of a thought experiment. However, the reader should be skeptical of the figures contained in the report without further support.

VI. Review of the Validity of the Findings and Conclusions

Given the intent to provide a thought-provoking proposal, the most appropriate critique is on conceptual rather than technical grounds. This review focuses on six of the many concerns:

The first concern arises from the lack of attention to human capital. Diffusion of innovation theory undergirds the report's suppositions about how innovations will be adopted, but little attention is given to the fact that human capital plays a strong mediating role in the speed and fidelity with which innovations are adopted. The report fails to mention that teachers are the primary human capital concern. A plethora of past research shows that getting teachers and other school staff to change their practice is a difficult process.¹² Moreover, past work criticizes many philanthropic ventures because the ideas about how to fix schools, as conceptualized by philanthropists, often do not align with practitioner ideas, experiences, or goals.¹³ Especially when implementing innovation at scale, this vital consideration is glossed over.

The second concern emerges from the assumed benefits of technology throughout the report. Undoubtedly, technology can be a powerful tool in the classroom. However, research often shows the promises accompanying technology generally fail to be realized. For example, Larry Cuban titled his important work on the topic *Oversold and Underused* to convey this theme. Rather than revolutionize teaching practice, Cuban concludes technology tends to serve a complementary and non-revolutionary role.¹⁴ The use of technology permeates the proposals throughout the report. However, scholars of education technology raise con-

cerns that implementing ed-tech can cause problems. “Investments in technology,” Ahn and Quarles write, “may well exacerbate existing inequities in education systems instead of improving conditions for the students most in need of support.”¹⁵ Thus, without sufficient attention to these issues, the report may be overselling something that may not work and runs the risk of intensifying existing inequity.

Relatedly, a third concern materializes from the report’s failure to discuss equity. A primary goal of education reform should be enhancing equity, and the lofty rhetoric in reforms will often explicitly or implicitly acknowledge this goal. The report not only fails to even use the word equity, it also does not substantively discuss the topic. Although many view inequitable access and unequal outcomes as major concerns, the reader is hard-pressed to find implications that equity is of serious concern within the proposal.

The fourth concern stems from the report’s focus on external professional services. Perhaps partially in response to the concerns identified above, the report suggests committing twenty percent of the \$4 billion total investment (\$800 million) to a mix of services meant to aid implementation. Although undefined, a large proportion of this investment appears to be directed to external professional services or consultancies. This may occasionally make sense, but concerns arise when considering cases such as Newark, NJ. Dale Russakoff’s chronicle of Mark Zuckerberg’s philanthropic efforts in Newark demonstrates the problems that can arise when relying heavily on consultants and outside professional service providers.¹⁶ Local stakeholders felt as if outsiders were controlling the agenda for Newark education reforms which created acrimony and hindered reform efforts. Thus, substantial reliance on

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external contractors may undercut the report’s focus on developing local demand and support for innovative schools. Further, it may also inhibit another important but overlooked challenge to school redesign: fostering human capital development among the professionals who will remain for the long-term and who

are closest to the students—teachers. Generally, one should be apprehensive about the report’s reliance on external contractors.

The fifth concern comes from the report’s concluding statements, where it says, “If after several years this approach isn’t living up to the potential we imagine, let’s change course.”¹⁷ On its face, this makes sense—why pursue something that is ineffective? But, it also disregards the outsized role philanthropy can have in a public system where the vast majority of funds go to costs that are not easily fungible, such as staffing. Should philanthropists scrap the initiative after five years, 1,700 schools will be left to deal with the aftermath and lost funding despite the many constraints they face.¹⁸ Especially concerning should be the potential for this philanthropic shift to continue (and exacerbate) reform churn—the process where schools move quickly among reforms, never allowing any to take root.¹⁹ If reliant on philanthropic money to pursue reforms, one is left to wonder if these 1,700 schools and communities would have the necessary capacity to cope with such disruption. Ultimately, in searching for quick and measureable success with large ROI, philanthropic investment could be counterproductive if courses rapidly change.

The final concern surfaces when considering the role of philanthropy in defining and narrowing the goals of public education. Although philanthropic funds pale in comparison to total education spending, they can disproportionately influence the development of new solutions to problems. However, of increasing concern is the ability of these funds (and funders) to direct public agendas.²⁰ The report ignores the potential for initiatives pursued via philanthropies to be undemocratic. Philanthropies are not subject to democratic checks and balances, and they can act in ways that do not require public input. Proposing that a handful of organizations band together and control public agendas creates potential problems for an institution that serves a public good.

VII. Usefulness of the Report for Guidance of Policy and Practice

The report presents a thought experiment as to what could be achieved with concerted philanthropic investment over the next decade, and its most valuable insight is a glimpse into where some of the most influential players in the philanthropic sector see investments heading. Philanthropists have contributed to changes in K-12 education systems for most of the last century, but these initiatives have not always been successful. The report leaves many questions about its proposal unaddressed, including many concerns regarding assumptions, feasibility, and whether or not it is an appropriate roadmap to achieve change in a public and democratic system. Rationales, when presented, only weakly justify the amounts dedicated to various initiatives. For these reasons, the report's usefulness to policy and practice is limited.

Notes and References

- 1 Calculated using data from the Foundation Center: <http://data.foundationcenter.org>
- 2 Silva, E., White, T. & Toch, T. (2015, January). *The Carnegie Unit: A century-old standard in a changing education landscape*. Retrieved February 20, 2017, from <https://www.carnegiefoundation.org/resources/publications/carnegie-unit/>

Shayna Klopott provides an excellent overview of past philanthropic initiatives and K-12 philanthropy scholarship. The opening sections of her recent dissertation provides a useful starting point to become acquainted with these and other issues. Klopott, S. (2015). *Funding for change: Factors affecting foundation funding of pre-collegiate education policy in the United States following the Charlottesville Summit and No Child Left Behind*. Unpublished doctoral dissertation, Columbia University, New York, NY.
- 3 Snyder, J.W. (2015). How old and new foundation granting differ. In F.M. Hess and J.R. Henig (Eds.), *The new education philanthropy: Politics, policy and reform* (pp. 29-54). Cambridge, MA: Harvard Education Press.
- 4 Childress, S., & Amroffell, M. (2016, December). *Reimagining learning: A big bet on the future of American education*. Oakland, CA: NewSchools Venture fund. Retrieved January 22, 2017, from <http://www.newschools.org/bigbet/>
- 5 For a succinct introduction to convergent grantmaking in K-12 education, see Reckhow, S., & Snyder, J.W. (2014). The expanding role of philanthropy in educational politics. *Educational Researcher*, 43(4), 186-195.
- 6 Rogers, E.M. (1983). *Diffusion of innovations*. New York, NY: Free Press.
- 7 Childress, S., & Amroffell, M. (2016, December). *Reimagining learning: A big bet on the future of American education*. Oakland, CA: NewSchools Venture fund. Retrieved January 22, 2017, from <http://www.newschools.org/bigbet/>, page 14.
- 8 As with this summary, the report's figures add up to \$3.9 billion. Although unstated, it seems this may have been because any line-item budget would include amounts for overages.
- 9 Pane, J.F., Steiner, E.D., Baird, M.D., & Hamilton, L.S. (2015, November). *Continued progress: Promising evidence on personalized learning*. Santa Monica, CA: RAND Corporation.

Woodworth, J.L., et al. (2015). *Online charter school study 2015*. Stanford, CA: Center for Research on Education Outcomes.

One should also note that days of learning calculations are not without problems. For a concise introduction to these potential problems, see Di Carlo, M. (2014, March 19). Estimated versus actual days of learning in charter school studies [Blog post]. Retrieved February 7, 2017, from <http://www.shankerinstitute.org/blog/estimated-versus-actual-days-learning-charter-school-studies>

Di Carlo, M. (2015, March 26). Lessons and directions from the CREDO urban charter school study [Blog post]. Retrieved February 27, 2017 from <http://www.shankerinstitute.org/blog/lessons-and-directions-credo-urban-charter-school-study>
- 10 Pane, et al. (2015, November). *Continued progress: Promising evidence on personalized learning*. Santa

Monica, CA: RAND Corporation.

- 11 Childress, S., & Amroffell, M. (2016, December). *Reimagining learning: A big bet on the future of American education*. Oakland, CA: NewSchools Venture fund. Retrieved January 22, 2017, from <http://www.newschools.org/bigbet/>, page 8.
- 12 See, for example, Spillane, J.P. (2006). *Standards deviation: How schools misunderstand education policy*. Cambridge, MA: Harvard University Press. Spillane examines how teachers make sense of policies and the ways this process can mediate the fidelity of reform implementation.
- 13 Cuban, L. (2015). A critique of contemporary edu-giving. In F.M. Hess and J.R. Henig (Eds.), *The new education philanthropy: Politics, policy and reform* (pp. 143-162). Cambridge, MA: Harvard Education Press.
- 14 Cuban, L. (2003). *Oversold and underused: Computers in the classroom*. Cambridge, MA: Harvard University Press.
- 15 Ahn, J., & Quarles, B. (2016). Technology and education in the United States: Policy, infrastructure and sociomaterial practice. In C.P. Loss and P.J. McGuinn (Eds.), *The convergence of K-12 and higher education: policies and programs in a changing era* (pp. 181-196). Cambridge, MA: Harvard Education Press, page 194.
- 16 Russakoff, D. (2015). *The prize: Who's in charge of America's schools?* New York, NY: Houghton Mifflin Harcourt.
- 17 Childress, S., & Amroffell, M. (2016, December). *Reimagining learning: A big bet on the future of American education*. Oakland, CA: NewSchools Venture fund. Retrieved January 22, 2017, from <http://www.newschools.org/bigbet/>, page 25.
- 18 Per the report's projections, over 1,700 schools would be created or redesigned in the first five years of the proposed investment. For reference, 1,700 schools would be more than all schools in the commonwealth of Kentucky (1579 public schools in 2014-2015, per the National Center for Education Statistics <https://nces.ed.gov/ccd/elsi/expressTables.aspx>).
- 19 Hess, F.M. (1999). *Spinning wheels: The politics of urban school reform*. Washington, D.C.: Brookings Institution Press.
- 20 Diane Ravitch is probably the most well-known critic of philanthropy as an undemocratic enterprise. For a concise introduction to the topic, consider Barkan, J. (2013, Fall). Plutocrats at work: How big philanthropy undermines democracy. *Dissent*. Retrieved January 22, 2017, from <https://www.dissentmagazine.org/article/plutocrats-at-work-how-big-philanthropy-undermines-democracy>

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