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Horace Mann Charter Schools

Their Past, Present, and Promise



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Executive Summary

School districts across the country have long been finding ways to give greater autonomy to schools, theorizing that providing school leaders with authority over the decisions that most directly affect their students will enable them to better meet students' needs and, in turn, improve student outcomes. Charter schools, which are public schools that are operated independently from local school districts and granted freedom from many state and local education laws and regulations, are perhaps the most well-known autonomous school model, but they're not the only one. Many school districts have created their own types of autonomous schools. Massachusetts, an early adopter of charter schools and a leader in the creation of in-district autonomous school models, led the way in the development of a district-charter hybrid model, known as Horace Mann Charter Schools (Horace Mann schools). Designed to be a hybrid between the charter and district sectors, Horace Mann schools are granted many of the same freedoms and flexibilities as independent charter schools but must be approved by their local school districts and remain part of their districts in important ways.

Through a review of past research on Horace Mann schools, analysis of publicly available data and documentation, and interviews with stakeholders (including current and former Horace Mann school leaders, Boston Public Schools (BPS) staff, and state officials and staff) this report analyzes the extent to which the Horace Mann school model has been able to realize the seven goals laid out in its founding legislation (which we’ve organized into four pillars for the purpose of analysis; Table 1):

Table 1 Four Pillars of the Original Goals for the Horace Mann School Model

Pillar	Goal(s) Outlined in Statute
Serve as Labs of Innovation	<ol style="list-style-type: none"> 1. To stimulate the development of innovative programs within public education. 2. To provide opportunities for innovative learning and assessments. 3. To provide teachers with a vehicle for establishing schools with alternative, innovative methods of educational instruction and school structure and management.
Share Best Practices	<ol style="list-style-type: none"> 4. To provide models for replication in other public schools.
Offer More Opportunities for Choice	<ol style="list-style-type: none"> 5. To provide parents and students with greater options in choosing schools within and outside their school districts.
Improve Student Outcomes and Strengthen School Accountability	<ol style="list-style-type: none"> 6. To encourage performance-based educational programs. 7. To hold teachers and school administrators accountable for students’ educational outcomes.

Source: An Act Relative to Charter Schools, Ch. 46, General Court of the Commonwealth of Massachusetts (1997).

Our research points to the following conclusions for each pillar:

Serve as labs of innovation: Horace Mann schools have leveraged their autonomies, in particular budget and staffing, to operate specialized programs that meet the needs of their students. Whether these approaches are truly “innovative” is more subjective. Some features of Horace Mann schools may be possible within the purview of traditional district schools, but many of the programs and approaches adopted by Horace Mann schools are distinct from district offerings.

Share best practices: Horace Mann schools can disseminate best practices both formally and informally. Formally, state law places the onus for facilitating the dissemination of best practices on the school committee of the district in which the Horace Mann school operates and on the state commissioner of education. Neither the state nor individual districts have developed strong systems to facilitate the sharing of best practices and, as a result, Horace Mann schools have been limited in their ability to do so on a large and formal scale.

Individual Horace Mann schools must also develop dissemination plans as part of their applications, however, these plans and approaches vary among schools. Most sharing that occurs is through informal networking among school leaders.

Offer more opportunities for choice: Horace Mann schools in Boston and across Massachusetts have succeeded in providing choice for families on a small scale, operating specialized programming, or filling gaps in their local districts (e.g., career programming not offered in the district, alternative programming, turnaround/restarts). However, because only 15 Horace Mann schools ever opened statewide and just six remain today, all in Boston, the reach of those choices has been limited to a small number of students in an even smaller number of communities.

Improve student outcomes and strengthen school accountability: Prior research suggests that Horace Mann schools are associated with higher proficiency and growth rates than district schools, but that Massachusetts' independent charter schools (known as Commonwealth charters) outperform all school types, including Horace Mann schools.¹ There are also many examples of Horace Mann schools serving high-need student populations well. Our analysis of Boston's 2021 Massachusetts Comprehensive Assessment System (MCAS) data complicates this narrative somewhat. While the data are a snapshot in time, and in a uniquely challenging school year, they suggest Horace Mann schools underperform other school styles, except for students in grade 10, where Horace Mann proficiency rates are on par with or exceed those in BPS' traditional and autonomous schools.

The data and information we have access to are limited and somewhat inconclusive, however. Horace Mann schools serve slightly higher proportions of low-income students and students of color, the sample size of schools is very small, and it was beyond the scope of this report to analyze student-level data. New, rigorous research is needed to fully understand Horace Mann schools' impact.

Across these four pillars it's clear that although there have been some bright spots and exciting opportunities created for students, overall the Horace Mann school model has not fully met the goals laid out in its founding legislation. Horace Mann schools have provided some innovative programs and meaningful choices for families, even if at a modest scale. At the same time, the sharing of best practices has been mostly ad hoc and student outcomes are not unequivocally positive. Two fundamental challenges have made it difficult for Horace Mann schools to achieve these goals.

The first is the **intersection of the Horace Mann school model's policy design and politics**. Horace Mann schools must secure approval from both the Massachusetts Board of Elementary and Secondary Education (BESE) and several local entities, including the school committee and the teachers union. This multilevel approval process was designed to ensure a close and mutually agreeable partnership between a Horace Mann school and its

local district. However, it has left Horace Mann schools vulnerable to changing politics and priorities at the state and local levels. Charter schools have always faced political opposition, and despite being both district and charter schools, Horace Mann schools are caught in the middle. Shifting priorities and increasing opposition among district leaders and/or the union have led to several Horace Mann closures and conversions across the state.

The second challenge is reflected in the **on-the-ground complexities of operationalizing school-level autonomy** for a single school, or small subset of schools, within a larger school district. Having even a single Horace Mann school in a district of otherwise traditionally operated schools requires that district to have in place separate processes to accommodate the Horace Mann school's autonomies. Depending on the exact contours of the school and which autonomies it has chosen and been approved to implement, that could mean a district may need a separate budgeting process, enrollment process, and transportation logistics. It may also mean, depending on the degree of centralization within the district, that students in one school are using different textbooks and curricula, that teachers are attending different professional development, and that a subset of families have students attending school on a different schedule. While these differences are essential for providing families with real options, they are complex logistics for a district to operationalize, especially when staff members change and priorities shift.

Despite the challenges, the current context continues to demand change and innovation. Data from the National Assessment of Educational Progress (NAEP) show flattened performance in Massachusetts and persistent gaps among subgroups of students.² In Boston, where the only remaining Horace Mann schools exist, student achievement has also stagnated in recent years,³ BPS recently entered into a new governance partnership with the state due to persistent low performance,⁴ and the city just elected a new mayor who, due to Boston's current structure of mayoral control over schools,⁵ will have an outsized impact on the future of the district, including the extent to which school choice and autonomy feature as part of its improvement plan.⁶ The Horace Mann school model is a lever that policymakers can use to address these challenges, both in Boston and statewide. We offer two potential paths forward for how policymakers can think about using Horace Mann schools as tools for school improvement — one that preserves and supports existing schools, and a second that offers a bolder, more forward-looking and visionary approach.

To preserve and support existing Horace Mann schools, the Massachusetts Department of Elementary and Secondary Education (DESE) must:

- **Consider ways to provide high-quality, long-standing Horace Mann schools with greater stability:** DESE should consider working with other state policymakers to create opportunities for high-quality, long-standing Horace Mann schools to achieve greater stability, potentially through longer authorization cycles, a reduction in the number of entities that must approve them during each renewal cycle, or the development of clear criteria for earning school committee and union approval, just as there are set criteria for state-level reauthorization.

- **Partner with BPS to help the district clarify its approach to autonomy:** As part of DESE’s recently established partnership with BPS, DESE must work with BPS leaders to clarify the district’s approach to autonomy, ensuring that it is aligned with state law and policy regarding Horace Mann schools and the autonomies to which those schools are entitled.
- **Provide training and support to school leaders:** DESE should provide Horace Mann school leaders with regular training to help them understand and exercise the autonomies granted to them by law, as well as opportunities to learn from and network with leaders of autonomous schools elsewhere in the state and nation.

Given that the only remaining Horace Mann schools are all located in Boston, BPS leaders must take specific steps to ensure these schools have the resources and support they need to continue to be good partners with the district and meet the needs of students, including:

- **Partner with DESE to clarify the district’s approach to autonomy:** BPS leadership must partner with DESE to clarify the role that school autonomy plays in the district’s overarching improvement plan, ensuring that its approach is aligned with state law and policy regarding Horace Mann schools’ autonomy.
- **Address known challenges related to overseeing and implementing multiple types of autonomous schools, in particular:**
 - > **Enrollment processes for students:** The district must streamline its enrollment process across all of its school types, including Horace Mann schools, to ensure equitable access for the city’s students and families.
 - > **Opt-out processes for district central services:** The current process for Horace Mann schools to opt out of district-operated central services isn’t ideal. BPS should review the current process, identify pain points, and adjust accordingly to ensure that both BPS’ central office staff and school leaders have the information they need to make timely decisions.
- **Create clear, equitable support for autonomous schools, including:**
 - > **Establish a central office support team for Horace Mann and other autonomous schools:** BPS must designate a central office team dedicated to serving and supporting Horace Mann and other autonomous schools to ensure strong implementation of autonomies across school types.
 - > **Support school leaders’ access to additional training and support:** BPS should work to spot trends in school leader needs and hire external organizations to provide relevant training to its Horace Mann school leaders to ensure they have the support they need.

Both DESE and BPS must create a structure for Horace Mann and other autonomous school types to share learnings and best practices: While Horace Mann school leaders have developed their own dissemination approaches and frequently network with one another, they would benefit from formal systems or structures to facilitate learning across schools.

The recommendations outlined above are necessary to ensure that Boston’s existing Horace Mann schools have the support and structures needed to provide a high-quality education to their students and to continue to be meaningful partners with the district. However, there is a different future for the Horace Mann school model, one in which its full potential is realized and Horace Mann schools become a core component of districts’ improvement plans. This will require district leadership with political acumen and bold vision.

To see this alternate future become a reality, district leadership must fully embrace a clear vision for autonomy, including clarity about the role that Horace Mann schools and other autonomous school types will play in the district, and take the steps necessary to build systems that support that vision. In doing that, the Horace Mann school model can be a tool that enables districts to lead in innovation and help the district meet its own needs. We see four potential paths for districts to take to effectively use Horace Mann schools in their own planning processes, none of which are mutually exclusive — a district could embrace multiple roles for these schools:

- 1 Horace Mann schools as a core component of a district’s strategy to meet specific needs:** As districts undergo strategic planning processes and identify their needs, leaders could launch a “call for schools” process for interested district staff or other local education professionals to open schools that meet the needs identified through the district’s strategic planning process (e.g., schools serving specific grade levels or neighborhoods, or with a particular focus like STEM or arts).
- 2 Horace Mann schools as a career pathway for high-performing school leaders:** Districts could use the Horace Mann school model as a leadership pipeline and career pathway for their top-performing school leaders. To do this, the district would identify its most talented and highest-potential leaders (those who consistently see improved student growth and performance, who have successfully turned around struggling schools, or any other criteria the district wishes to use) and provide them with deep support to design and launch new Horace Mann schools.
- 3 Horace Mann schools as a mechanism for choice and student retention:** As districts seek to attract and retain students, especially as the COVID-19 pandemic subsides, Horace Mann schools can play a role in offering more choices for families to encourage them to return to their local school districts.
- 4 Horace Mann schools as a way to meet the needs of specific or high-need populations:** Horace Mann schools have long been successfully serving a particular niche or need within a district, and visionary leaders could use Horace Mann schools to meet the needs of unique student populations, establishing schools designed to meet the learning needs of specific groups of students.

As school districts across Massachusetts work to address substantial enrollment declines resulting from the pandemic and to meet the needs of high-need student groups, they must consider all tools at their disposal. The status quo isn't working, and districts must be willing to embrace opportunities to better serve all of their students. Horace Mann schools can play a critical role in doing just that.

Introduction

Massachusetts led the way in creating a charter-district hybrid model, known as Horace Mann charter schools.

School systems across the nation have been experimenting with shifting decision-making away from the central office to the school level since the first public schools opened in the 19th century.⁷ Though these movements have different names (e.g., decentralization, school-based decision-making, school autonomy) and slightly different approaches, they have in common the goal of providing individual school leaders with greater ownership and flexibility over the day-to-day decisions that affect the students and teachers in their schools in an effort to better meet students' needs and improve their academic performance.⁸

Home to America's oldest school system, Massachusetts is no stranger to these efforts. In fact, the state originated some early school autonomy and school choice reforms. In 1993, just a year after the first charter school opened its doors in Minnesota, the Massachusetts legislature passed its own charter school law, creating an autonomous type of public school designed to develop new approaches to education and improve student outcomes.⁹

Four years later, Massachusetts led the way in creating a charter-district hybrid model, known as Horace Mann charter schools.¹⁰ These schools have many of the same autonomies granted to charter schools but require approval from their local school district and remain part of that local school district in key ways. The Massachusetts legislature established Horace Mann schools in the early days of the charter school movement, when policymakers and practitioners across the country wanted to create schools that had the autonomy to innovate, provided families with options, and were accountable for their outcomes. And by remaining part of their local school district, Horace Mann schools sought to mitigate concerns that charter schools would harm local school districts by siphoning students and resources.

In creating this school model, the Massachusetts legislature outlined seven goals:

- ① “To stimulate the development of innovative programs within public education.
- ② To provide opportunities for innovative learning and assessments.
- ③ To provide parents and students with greater options in choosing schools within and outside their school districts.
- ④ To provide teachers with a vehicle for establishing schools with alternative, innovative methods of educational instruction and school structure and management.
- ⑤ To encourage performance-based educational programs.
- ⑥ To hold teachers and school administrators accountable for students’ educational outcomes.
- ⑦ To provide models for replication in other public schools.”¹¹

Through a review of past research on Horace Mann schools, analysis of publicly available data and documentation, and interviews with stakeholders (including current and former Horace Mann school leaders, BPS staff, and state officials and staff) this report analyzes the extent to which the Horace Mann school model has realized these goals. It finds that, ultimately, while many Horace Mann schools have created specialized programs, they’ve been limited in the extent to which they’ve been able to truly push the limits of “traditional” school models; sharing best practices has mostly happened informally, with few structures in place to support and encourage the sharing of best practices among schools; evidence of student outcomes is mixed, with some research showing a positive impact compared with district schools but recent data showing performance mostly on a par with and sometimes worse than the district; and statewide adoption of the model has been minimal, resulting in Horace Mann schools providing few actual choices for families.

But that’s not the full story. The ability of Horace Mann schools to fully embrace the autonomies granted to them in legislation has been constrained by two fundamental challenges. First, the policy design of the Horace Mann model requires approval from several state and local entities, leaving Horace Mann schools vulnerable to changing politics and priorities. And second, there are very real, on-the-ground implementation challenges and complexities that can make it difficult for Horace Mann schools to navigate (and school districts to provide) the resources and support they need to fully operationalize their autonomies.

Despite the challenges, the current context continues to demand improvement. Data from the NAEP show stagnant performance in Massachusetts and persistent gaps among subgroups of students.¹² In Boston, where the only remaining Horace Mann schools exist, student achievement has also stagnated in recent years.¹³ BPS recently entered into a new governance partnership with the state due to persistent low performance,¹⁴ and the city just elected a new mayor who, due to Boston’s current structure of mayoral control over

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schools,¹⁵ will have an outsized impact on the future of the district, including the extent to which school choice and autonomy feature as part of its improvement plan.¹⁶ State and local policymakers must consider every available lever to ensure students in Boston and Massachusetts have access to high-quality schools that meet their needs; Horace Mann schools are one of those levers.

This report begins with an overview of the historical context surrounding the creation of the Horace Mann school model. Section II offers an analysis of the extent to which the model has been able to realize the goals set out for it in its founding legislation, and Section III provides an analysis of challenges that Horace Mann schools have faced along the way. Section IV concludes by offering two potential paths forward for the Horace Mann school model and the role it can play in addressing long-standing achievement gaps and persistent challenges facing school districts across Massachusetts — and in particular in Boston, where solutions are desperately needed to improve outcomes but where the Commonwealth charter school cap has been reached and there seems to be little political will to raise it.

SECTION I

Lay of the Land

Historical Context

The early and mid-1990s were a time of turmoil and change in both Boston and throughout the state of Massachusetts. The city of Boston was only beginning to rebound from a major fiscal decline,¹⁷ was experiencing a continued decline in the school-aged population,¹⁸ and was confronting profound inequities in terms of educational spending and outcomes.¹⁹ The state of Massachusetts was embroiled in a lawsuit, *McDuffy v. Robertson*, challenging the equity of the state's education finance system.²⁰

In 1993, the Massachusetts legislature passed a landmark education bill, the Massachusetts Education Reform Act. While this bill had been in the works for several years prior to the conclusion of *McDuffy v. Robertson*, the outcome of this case, which found that Massachusetts had “failed to meet its constitutional duty to provide an adequate education” to all public school students,²¹ helped push it toward passage.²² Alongside increased funding, standards-based reforms, and statewide assessment, the Education Reform Act also authorized the creation of charter schools in Massachusetts, known today as Commonwealth charter schools. It placed limits on their prevalence, allowing just 25 charter schools statewide, with no more than five in Boston, five in Springfield, or two in any other city or town.²³

Despite the limits, the possibility that existing district schools could lose students, staff, and resources raised enough concern within BPS that, in 1994, city, district, and union leaders found a way to provide greater autonomy to schools while retaining those schools (and their teachers and students) in the district. They did so by creating a new type of in-district autonomous school, called Pilot schools.²⁴

While having the phrase “charter school” in their name suggests a strong association with Commonwealth charter schools, in reality, Horace Mann schools sprung out of BPS’ in-district Pilot school model.

The potential and promise of the Pilot school model to address multiple needs at once — retaining students and teachers in the district while providing school leaders with greater autonomy to meet the needs of their students and staff — led the Massachusetts legislature in 1997 to create a statewide version of BPS’ Pilot schools, known as Horace Mann charter schools. While having the phrase “charter school” in their name suggests a strong association with Commonwealth charter schools, in reality, Horace Mann schools sprung out of BPS’ in-district Pilot school model.²⁵

Then and now, Horace Mann schools operate under a charter, which is ultimately approved by the BESE, but they must also obtain signoff from the local school committee and the local teachers union. As the concept of in-district autonomous schools spread across the state, BPS continued to use them as a tool for district improvement. BPS’ 2009-2014 strategic plan, for example, asserted: “In cases where increased autonomy at the school level would provide the best results for our students, we will expand the network of pilot schools ... and Horace Mann in-district charters.”²⁶

The 1997 legislation that created Horace Mann schools, An Act Relative to Charter Schools, permitted 13 Horace Mann schools to operate across the state (in addition to increasing the number of permitted Commonwealth charter schools from 25 to 37).²⁷ In 2000, that cap was raised to 72 Commonwealth charters and 48 Horace Mann schools.²⁸ A new push for autonomy was well underway.

By the end of the decade, the Massachusetts legislature had created two additional types of autonomous schools, Innovation schools and Turnaround or Receivership schools,²⁹ demonstrating an ongoing effort to increase school-level autonomy. Innovation schools were created as part of then-Governor Deval Patrick’s overhaul of education and an effort to create more autonomous schools statewide.³⁰ Turnaround or Receivership schools were designations given to persistently low-performing schools that are placed under the authority of a “receiver” (an outside entity assigned to operate the school), which is granted additional autonomy to operate the school in order to quickly improve student outcomes.³¹

Despite the momentum around school autonomy, as evidenced by ongoing creation of new autonomous school models, there has been little policy action on Horace Mann schools over the past decade. There was energy in the early years, with 13 applications filed in 1998 alone to open Horace Mann schools in districts across the state. However, perhaps because the Commonwealth charter model provided greater autonomy or because the politics of the charter movement soured, demand for the model quickly dissipated. Since 1998, there have been just 20 additional applications for Horace Mann schools (33 total since the model was created). Only 15 Horace Mann schools ever opened their doors to students, and just six Horace Mann schools remain today, all in Boston (Table 2).³²

Despite the momentum around school autonomy, as evidenced by ongoing creation of new autonomous school models, there has been little policy action on Horace Mann schools over the past decade.

Table 2 > List of Remaining Horace Mann Schools

School Name	Type of Horace Mann School	Year Charter Granted	Grade Levels Served
Boston Day and Evening Academy	HMI	1998	9-12
Boston Green Academy	HMIII	2011	6-12
Dudley Street Neighborhood Charter School	HMIII	2012	PK-5
Edward M. Kennedy Academy for Health Careers	HMI	1998	9-12
UP Academy Charter School of Boston	HMIII	2011	6-8
UP Academy Charter School of Dorchester	HMIII	2013	PK-8

Source: [The Commonwealth of Massachusetts Department of Elementary and Secondary Education Massachusetts Charter Schools Fact Sheet](#).

Comparison of Types of Autonomous Schools

While we refer to Horace Mann schools as a collective throughout this report, it's important to note that there are three different types of Horace Mann schools, with the key difference being their approval processes:³³

- Horace Mann I (HMI): This was the original type of Horace Mann school and was the only model available from 1997 until 2010. It requires applications to be submitted to BESE only after the plan has gained the approval of both the local collective bargaining unit and the local school committee.
- Horace Mann II (HMII): Created in 2010, the HMII allows an existing district school to convert to a Horace Mann school. An HMII application may be submitted with the approval of the school committee. If the application includes modifications to the collective bargaining unit, a majority of the school's teachers must approve a memorandum of understanding (MOU), with the vote to be held within 30 days of submission of the application.
- Horace Mann III (HMIII): Also created in 2010, the HMIII allows for the creation of a new school with the submission of an application approved by BESE and the local school committee. An agreement with the local teachers union is *not* required prior to initial BESE approval of an HMIII; however, the school must obtain agreement of the local teachers union prior to renewal and reauthorization at the five-year mark.

In terms of how Horace Mann schools compare to other types of autonomous schools, there are more similarities than differences. All have some degree of flexibility over their budgets, key staffing decisions, and core programming. The table below summarizes the contours of each autonomous school type across these dimensions (Table 3).

Table 3 Approval and Accountability Processes for Massachusetts' Autonomous Public School Models

	Commonwealth Charter Schools ³⁴	Horace Mann Schools ³⁵	Innovation Schools ³⁶	Pilot Schools ³⁷	Receivership Schools ³⁸
Approval Process	Apply to and receive approval from BESE	Local approval differs for HMI, II, and III (Table 2); all require final approval by BESE	Entirely locally based; the school superintendent and representatives from the school committee and union review and approve a school's Innovation plan	Superintendent and school committee of the district must provide approval	The state commissioner can appoint a new leader to "operate chronically underperforming schools and implement a turnaround plan"
Authorizing Entity	BESE	BESE	Local school committee	Superintendent and BTU/BPS Joint Steering committee	Commissioner of Education
Accountability	Schools submit an annual report to BESE, which conducts a charter renewal process every five years	Schools submit an annual report to the local school committee and BESE; the charter must be reapproved by the local school committee and union every five years before undergoing BESE's charter renewal process	State accountability system plus the Innovation plan is approved and renewed by the school committee for up to five years; superintendent conducts annual evaluations and can amend or revoke the plan if goals are unmet	State accountability system plus any additional, locally-established processes	Turnaround plans are approved for no more than three years; the receiver is "held responsible for implementing and achieving the goals set out in the school's turnaround plan" and presents a quarterly progress report to the school committee

The approval process is perhaps where the most fundamental differences exist among school types.

As Table 3 demonstrates, the approval process is perhaps where the most fundamental differences exist among school types. Commonwealth charter schools require only state approval, while Innovation and Pilot schools require only local approval. True to their hybrid nature, Horace Mann schools require both state and local approval. Receivership schools are slightly different, in that schools don't opt in to that model; they're assigned to receivership status based on their performance and the commissioner selects an external organization to oversee the school.

The multilayered approval process — in particular the need for approval by the local teachers union either at inception (for HMIs and HMIs) or renewal (for all types of Horace Mann schools) — is one of the challenges facing the opening of new Horace Mann schools and the ongoing sustainability of existing ones. HMIs were designed primarily to offer schools a way around this requirement at the outset, allowing new Horace Mann schools to open without needing initial sign-off from the union. It did not completely solve that problem, however, as discussed in detail later in this report. The requirement for union approval at the five-year mark led to several schools closing or converting to Innovation or district schools.

The accountability structures in place for these schools vary as well. Commonwealth charter schools, Horace Mann schools, and Innovation schools undergo five-year review and renewal processes (albeit by different entities and with some variation in requirements). Receivership schools' turnaround plans are approved for no more than three years.

Once approved, there are three main buckets of autonomies that these schools have: staffing autonomy (e.g., educator evaluation, hiring and firing), budget autonomy (e.g., discretionary services, how they receive state and federal grants), and operational autonomy (e.g., curriculum, school day and year schedules). Tables 4-6 summarize these autonomies across school models.

In terms of staffing autonomies, it's important to note that Commonwealth charter schools are the only type of autonomous school model not covered by their local school district's collective bargaining agreement (CBA). Teachers in the other four autonomous school types are all covered by their respective district's CBA. Processes are in place to allow for flexibility from CBA provisions; however, all require negotiation with and approval from the union. This means that although state law outlines additional staffing flexibilities for Horace Mann schools, the schools' ability to take advantage of those flexibilities relies on obtaining and maintaining union approval.

Table 4 Staffing Autonomies for Massachusetts' Autonomous Public School Models

	Commonwealth Charter Schools ³⁹	Horace Mann Schools ⁴⁰	Innovation Schools ⁴¹	Pilot Schools ⁴²	Receivership Schools ⁴³
Contractual Work Conditions	Teachers are not covered by the district's CBA; however, teachers have the right to establish a bargaining unit for their school	The charter application and MOU submitted to BESE must include any changes to the CBA (for HMIIIIs, negotiation of the MOU comes after approval by BESE)	The Innovation plan submitted to the superintendent and school committee must detail any waivers to the CBA; for conversion schools, two-thirds of teachers in that school must approve of waivers	An election-to-work agreement defines work conditions, and "schools may be exempt from most conditions in the local contract"	In creating a turnaround plan, the commissioner and receiver may "limit, suspend, or change one or more provisions of the CBA" by requesting that the school committee and union bargain or reopen bargaining
Educator Evaluation	Developed by each school	Must abide by educator evaluation regulations and CBA unless exemption is provided by an MOU or addressed in the charter	The Innovation plan must include any changes to educator evaluation regulations and be approved by the commissioner	Must abide by educator evaluation regulations but can establish additional process that go beyond requirements	In creating a turnaround plan, the commissioner and receiver may establish steps to "assure a continuum of high-expertise teachers by aligning hiring, induction, teacher evaluation, professional development," and teacher advancement structures

Table 4

Staffing Autonomies for Massachusetts' Autonomous Public School Models, *continued*

	Commonwealth Charter Schools ³⁹	Horace Mann Schools ⁴⁰	Innovation Schools ⁴¹	Pilot Schools ⁴²	Receivership Schools ⁴³
Layoffs	Charter schools operate separately from school districts and can set their own policies for layoffs	MOUs may specify that schools are exempt from "bumping" (a practice that allows more-senior teachers to replace less-senior teachers during layoffs)	The Innovation school statute does not address layoffs, but they could be addressed in the Innovation plan	Determined by the district's CBA	In creating a turnaround plan, the commissioner and receiver may require all leaders, "teachers, and staff to reapply for their positions with full discretion vested" in the receiver
Salaries	Salaries are established by the school	Salaries are established by the district's CBA	Salaries are established by the district's CBA unless indicated otherwise in the Innovation plan	Salaries are established by the district's CBA	In creating a turnaround plan, the commissioner and receiver may provide funds to increase the salaries of an administrator or teacher working in the school

Budget autonomy is particularly important for exercising many of the other autonomies afforded to autonomous schools.

Budget autonomy, summarized in Table 5, is particularly important for exercising many of the other autonomies afforded to autonomous schools. School-level budget discretion allows school leaders to reallocate funds to, for example, hire additional staff to implement a particular program, purchase a new curriculum, or provide additional professional development to teachers and staff.

One key element of budgetary autonomy that Commonwealth and Horace Mann schools enjoy is the ability to receive state and federal grants directly, rather than having funds allocated first to the local school district and then redistributed to schools.⁴⁹ The direct receipt of federal funds was particularly helpful during the pandemic, as Horace Mann schools were able to directly receive and spend federal funds to address emergent needs. Horace Mann schools also have the option to budget based on the actual salaries of their teachers, rather than on the districtwide average salary as traditional district schools must do (Sidebar 1).

Table 5 > Budget Autonomies for Massachusetts' Autonomous Public School Models

	Commonwealth Charter Schools ⁴⁴	Horace Mann Schools ⁴⁵	Innovation Schools ⁴⁶	Pilot Schools ⁴⁷	Receivership Schools ⁴⁸
Central Discretionary Services (e.g., printing, food service, services for students with disabilities)	Charter schools operate separately from school districts and don't have access to district-operated central discretionary services	The MOU "describes the options available to the school to purchase or obtain" services from the district	A school's Innovation plan may outline discretionary services from the district	Schools may purchase central services or have per-pupil funding included in the school's budget	N/A (not addressed in receivership legislation)
Facilities	Must find and pay for facilities	Schools' boards of trustees and the local school committee negotiate facilities arrangements and costs, defined in the MOU	Unless other arrangements are detailed in the Innovation plan, the local district provides a facility	Schools pay for the facility only if it is not a city-owned facility	School continues in the facility that was occupied before receivership

Table 5

Budget Autonomies for Massachusetts' Autonomous Public School Models, *continued*

	Commonwealth Charter Schools ⁴⁴	Horace Mann Schools ⁴⁵	Innovation Schools ⁴⁶	Pilot Schools ⁴⁷	Receivership Schools ⁴⁸
State/Federal Grants	Each school receives state/federal grants directly	Schools can choose to “apply for entitlement/ allocation funds itself or...assign its entitlement to the local school district” and work with the superintendent to ensure those funds will benefit the school’s students	Each school receives state/ federal grants through the local school district	Each school receives state/ federal grants through the local school district	N/A (not addressed in receivership legislation)
Funding Formula	Receive student funding directly from the state “based on statutory formula and student enrollment”	The school and school committee must agree upon the school’s appropriation, as outlined in the MOU; it must be comparable to district funding	The school’s Innovation plan must detail the funding formula and budget process, and may carry over funds year to year	Like all district schools, budget is based on district’s student-weighted funding formula	N/A (not addressed in receivership legislation)

School Budgeting Using Actual Versus Average Salaries

When determining school budgets, many districts, including BPS, allocate the number of staff to the school based on factors like student enrollment, and then use average costs (including average teacher salary) to create budgets for individual schools. This can result in actual costs that don't align with budgeted costs. For example, if the staff in a given school is either very experienced (with higher-than-average salaries) or very inexperienced (with lower-than-average salaries), the actual budget the school needs to cover teacher salaries may differ substantially from the district average.

One of the budgeting flexibilities that Horace Mann schools have is the ability to use their staff's actual salaries or the district average to determine their budget. BPS' traditional schools must instead use the district's average salary. This difference has significant implications, as illustrated below:⁵⁰

SIDEBAR TABLE 1

Teachers, by Years of Experience and Average Salary	Traditional School A	Traditional School B	Autonomous School
< 5 Years at \$65,000	5 teachers = \$325,000	10 teachers = \$650,000	10 teachers = \$650,000
5-15 Years at \$80,000	5 teachers = \$400,000	5 teachers = \$400,000	5 teachers = \$400,000
15+ Years at \$95,000	10 teachers = \$950,000	5 teachers = \$475,000	5 teachers = \$475,000
Total Teacher Salary	20 teachers = \$1,675,000	20 teachers = \$1,525,000	20 teachers = \$1,525,000
Average Teacher Salary Used for Budget	\$79,405 District Average	\$79,405 District Average	\$73,750 School Actuals
Total Teacher Salary Used for Budget	\$1,588,100	\$1,588,100	\$1,475,000
Impact of Average/Actual Salary in Budget	\$86,900 additional available for other purchases	\$63,100 additional removed from budget	No impact

The system advantages **traditional school A**, which has more teachers with more experience. “Although its teachers earn a total of \$1,675,000, it has to budget only \$1,588,100 for teacher salaries. The difference – \$86,900 – is essentially funded by the district.” A smaller budget for teacher salaries allows the school to direct more resources to other needs or services.

Sidebar 1 *continued*

The system disadvantages **traditional school B**, which has a less experienced teacher force. “This inflexibility amounts to a sizable budget penalty for the school.” Traditional school B must also budget \$1,588,100 for its teachers using the district’s average salary. However, the actual amount it needs to pay its teachers is just \$1,525,000. The district holds back the difference between what the school must budget and what it actually needs — a total of \$63,100 — and sends those dollars to other schools, such as traditional school A, to cover gaps in their teacher salary budgets. Because it’s required to budget more for salaries than it actually needs, the school has less funding available for other expenditures.

In contrast to traditional schools, **autonomous schools** are able to use actual — rather than average — salaries in their budgets. With the same teacher composition as traditional school B, the autonomous school budgets \$1,525,000 for its teachers and spends that amount on teacher salaries. The \$63,100 that is unavailable to traditional school B (because it’s held back by the district) is “still available to the autonomous school, which can then spend it on services with the greatest potential to improve student outcomes.”

This hypothetical demonstrates how autonomous schools benefit from budgeting using actual teacher salaries — but also underscores the inequities created among schools with staff of different experience levels.

Source: French, Miles, and Nathan, “[The Path Forward: School Autonomy and Its Implications for the Future of Boston’s Public Schools](#).”

Horace Mann schools are funded similarly to other types of district-operated autonomous schools. They receive fewer per-pupil funds than Commonwealth charter schools, but also receive more services from the district.

In terms of funding, Horace Mann schools are funded similarly to other types of district-operated autonomous schools (Innovation and Pilot). They receive fewer per-pupil funds than Commonwealth charter schools, but also receive more services from the district, including a school facility (Sidebar 2).

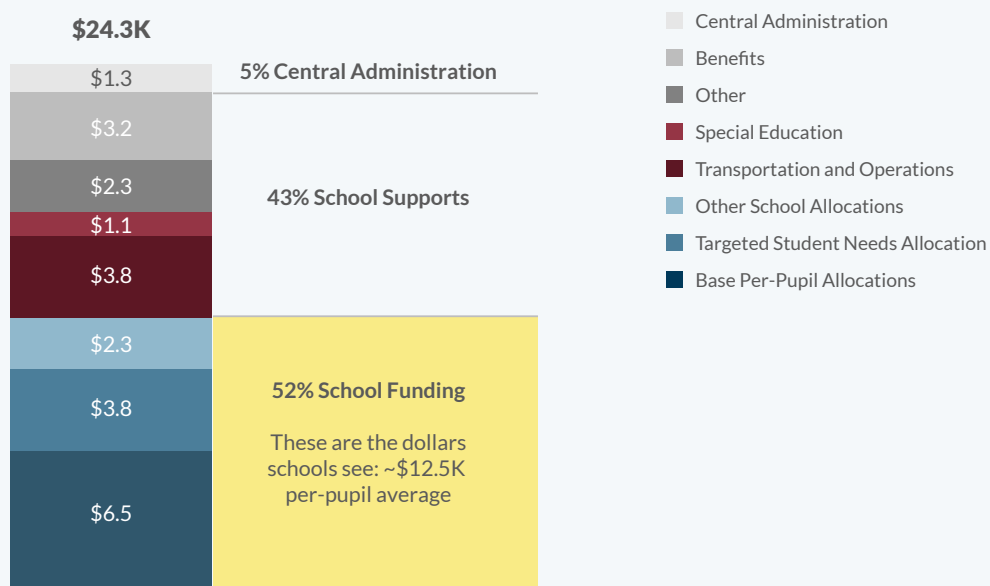
Horace Mann School Funding

Although Horace Mann schools are, in many ways, a blend of traditional district and charter schools, they’re funded akin to district schools. Commonwealth charter schools are funded on a per-pupil rate set by the state. Horace Mann schools, on the other hand, must submit an annual budget request to the local superintendent and school committee and must be funded consistently with other district schools.⁵¹ Our analysis of Horace Mann school budgets compared with Boston-based Commonwealth charter schools and other district-operated schools in BPS revealed two important findings:⁵²

- 1 Boston’s Horace Mann schools are funded comparably to other BPS district schools.** All BPS schools, including Horace Mann schools, receive a per-pupil allocation that is based on several categories of funds:⁵³
 - A base per-pupil allocation
 - Targeted student needs allocations (for high-need students)
 - Other school allocations (e.g., state or federal grants)
 - Transportation and operations
 - Special education (including related services like speech therapy)
 - Staff benefits
 - Central administration (for core district operations)
 - Other (e.g., additional services to schools such as CTE or summer programming)

Including all these factors, the average per-pupil funding for BPS district schools is \$24,300 (Sidebar Figure 1). Schools “see” slightly more than half of that – \$12,500 – which includes the base per-pupil allocations, targeted student needs allocation, and other school allocations. The central office holds back the balance of the funds in the remaining categories to cover the costs of centralized services. (Note that these numbers represent the district average; individual schools may receive more or less based on their student populations.)

SIDEBAR FIGURE 1 How BPS Funds Are Allocated, 2020-21

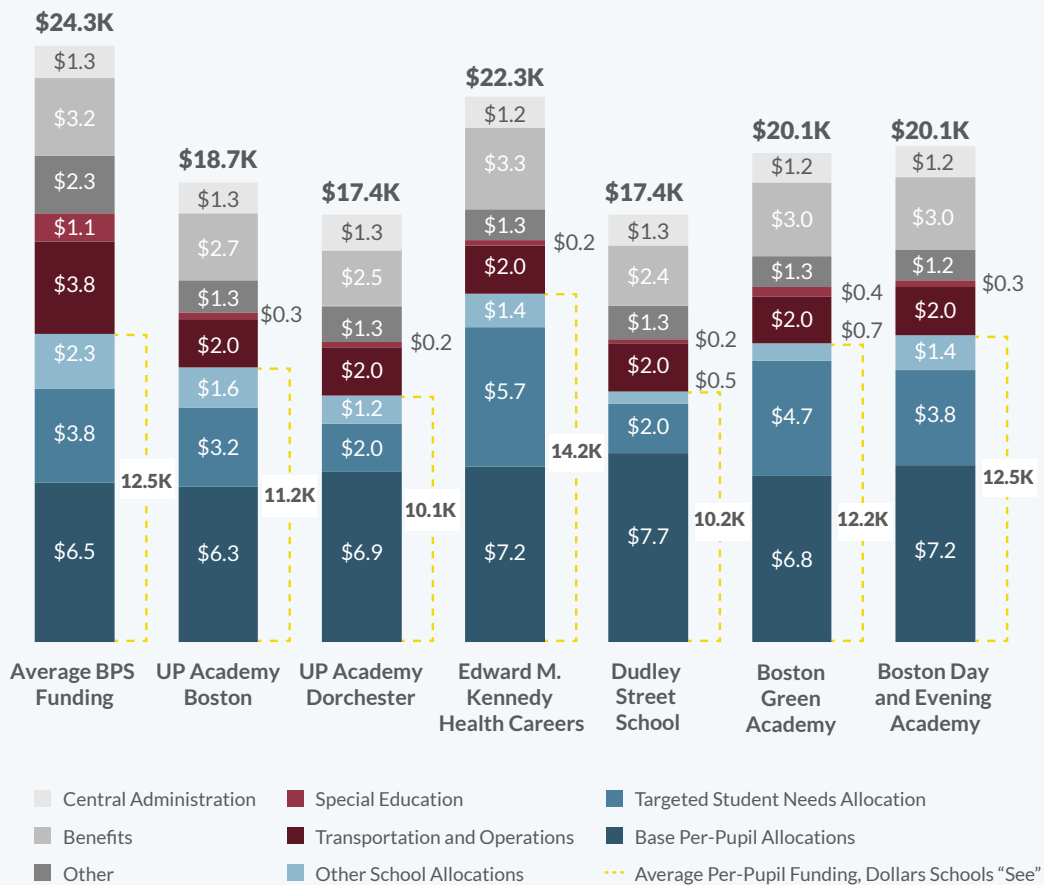


Source: Authors’ analysis based on [Boston Public Schools Budget](#), online data tool.
 Note: Column data may not sum to total due to rounding.

continued

Horace Mann schools are funded in the same way. As the figure below illustrates, the average per-pupil allocation to individual Horace Mann schools ranges from just over \$17,000 to more than \$22,000. The amount that Horace Mann schools actually “see” (the funds that go to the school and are not held back by the central office, colored blue in the image below) ranges from \$10,000 to more than \$14,000, roughly in line with the districtwide average.

SIDEBAR FIGURE 2 Per-Pupil Allocations by Horace Mann School, 2020-21



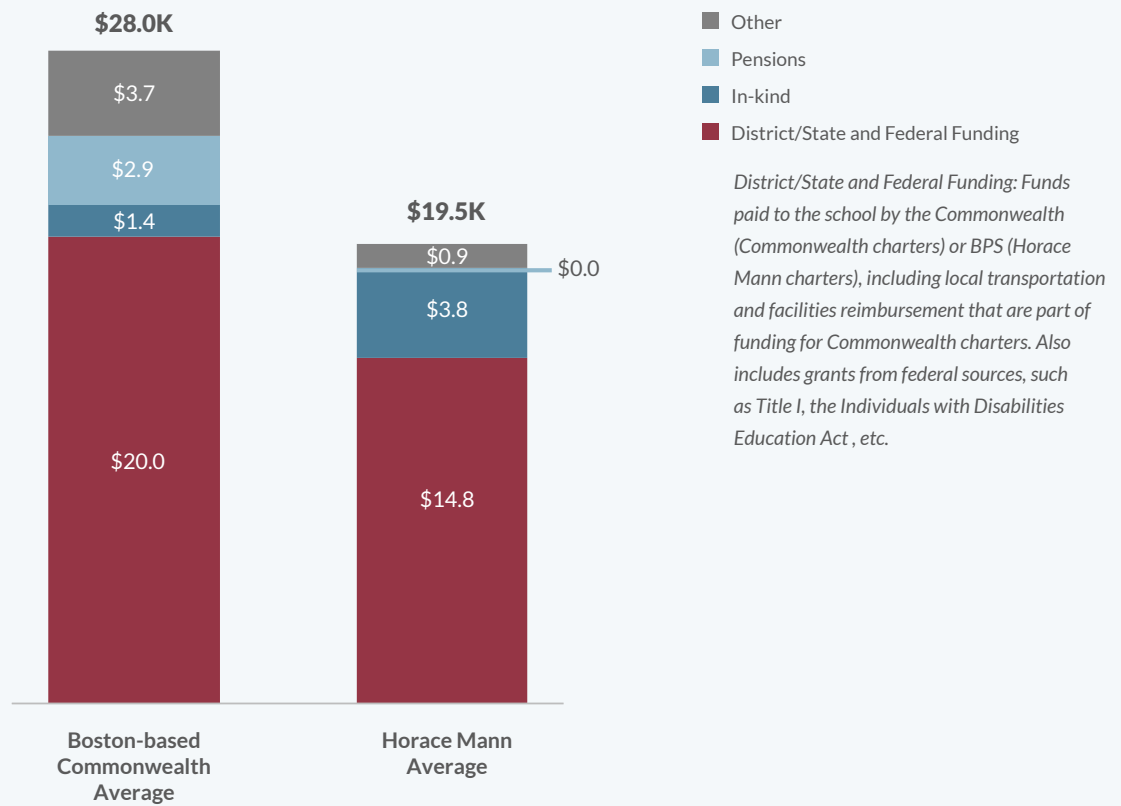
Source: Authors' analysis based on [Boston Public Schools Budget](#), online data tool.

Note: Column data may not sum to total due to rounding.

continued

2 Boston’s Horace Mann schools receive approximately \$8,500 less than Boston-based Commonwealth charter schools, but spend about \$7,000 less due largely to savings driven by their partnership with BPS. The average Boston-based Commonwealth charter school receives about \$28,000 in per-pupil revenue, compared with an average of \$19,500 for Horace Mann schools, resulting in a revenue gap of approximately \$8,500 (Sidebar Figure 3).

SIDEBAR FIGURE 3 Total Revenues Per-Pupil, FY20



Source: Authors’ analysis based on Charter School End of Year Financial Report (CSEOFYR); DESE.
 Note: Column data may not sum to total due to rounding.

continued

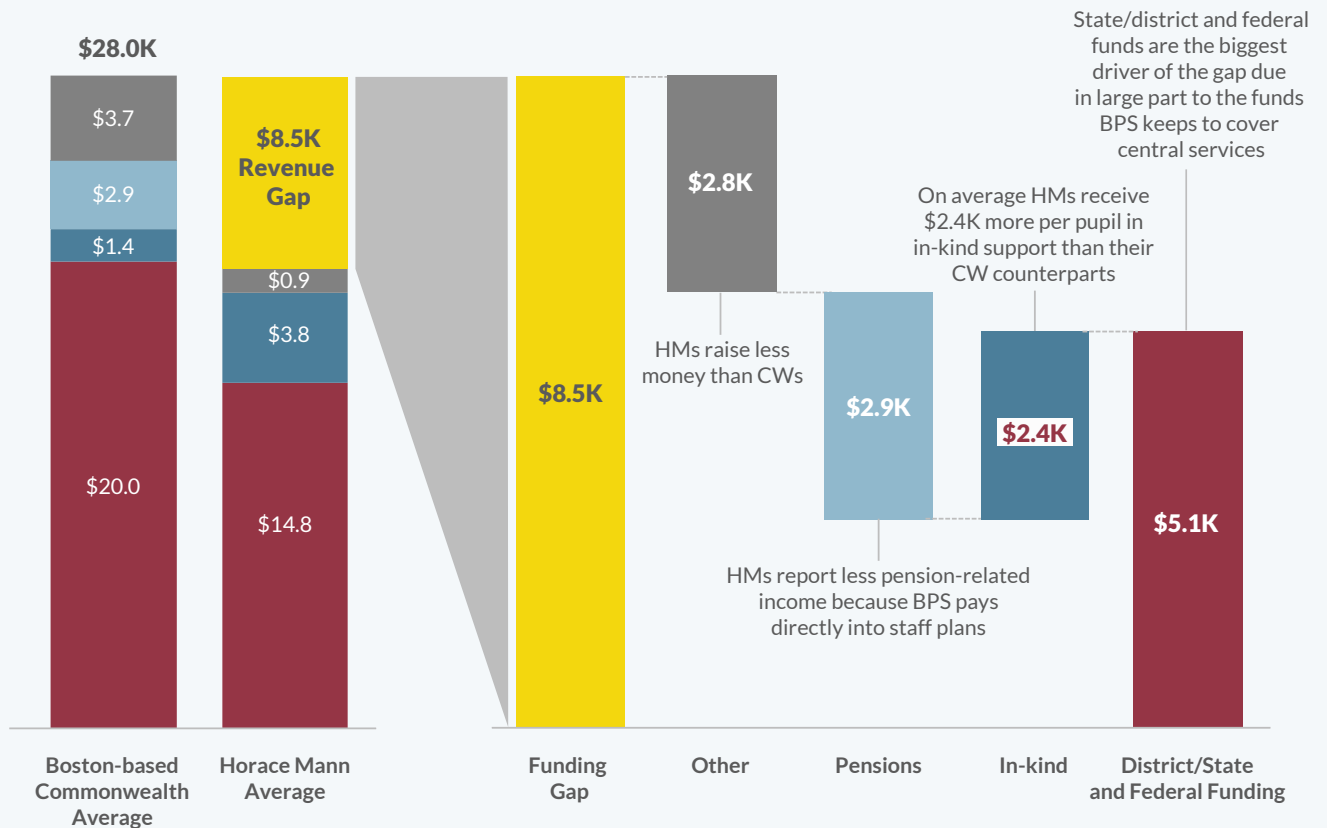
There are four primary drivers of the gap between Horace Mann schools and Boston-based Commonwealth charter schools (see figure below):

- Horace Mann schools raise, on average, \$3,000 less per pupil than Commonwealth charter schools.
- Horace Mann schools report approximately \$3,000 less per pupil for pension-related revenue because BPS pays directly into staff plans while Commonwealth charters must use their per-pupil funding to cover the costs of staff retirement benefits.
- Horace Mann schools receive an average of \$2,400 more per pupil in in-kind support from the district (e.g., facilities maintenance, food services) than Commonwealth charter schools.
- Horace Mann schools receive an average of \$5,000 less per-pupil in state/district and federal funding than Commonwealth charter schools, largely because BPS keeps funds to cover central services.

SIDEBAR FIGURE 4

Total Revenues Per-Pupil, FY20

Average Difference in Per-Pupil Revenues for HM Schools, FY20



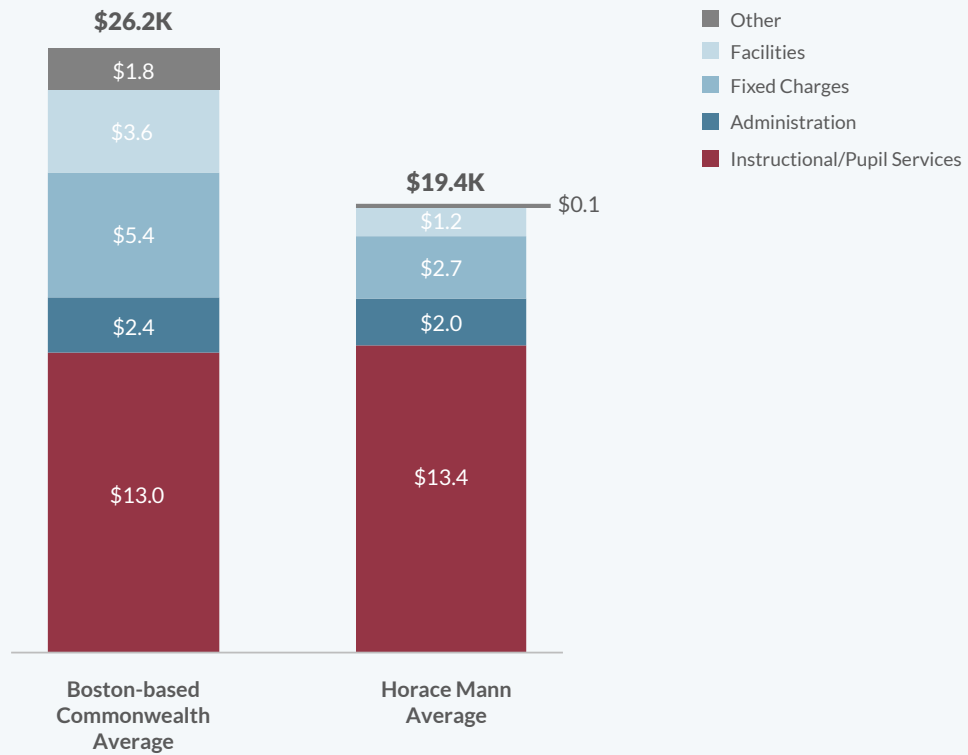
Source: Authors' analysis based on Charter School End of Year Financial Report (CSEOFYR); DESE.

Note: Column data may not sum to total due to rounding.

Horace Mann schools' partnership with BPS results in the schools receiving fewer per-pupil dollars directly compared with Commonwealth charter schools, but it also results in Horace Mann schools spending less of their per-pupil revenue on costs such as facilities maintenance or food services compared with Commonwealth charter schools. *continued*

As the image below illustrates, Commonwealth charter schools expend an average of more than \$26,000 per pupil, compared with the Horace Mann average of \$19,400 – a spending gap of nearly \$7,000 per pupil.

SIDEBAR FIGURE 5 Total Expenditures Per-Pupil, FY20



Source: Authors' analysis based on [Charter School End of Year Financial Report \(CSEOFYR\)](#); DESE.
Note: Column data may not sum to total due to rounding.

continued

There are two primary drivers for this difference in average expenditures (Sidebar Figure 6):

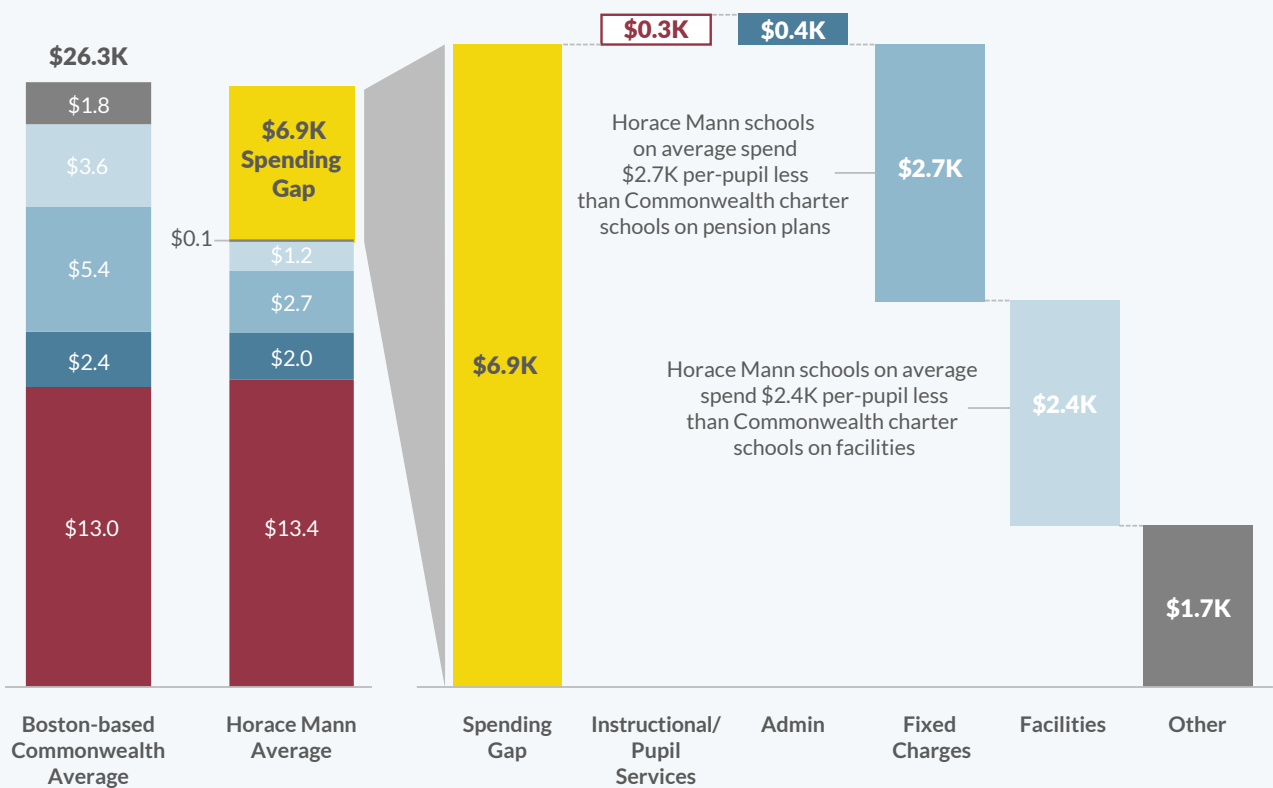
- Horace Mann schools spend nearly \$3,000 per pupil less than Commonwealth charter schools on pension plans.
- Horace Mann schools spend about \$2,400 less per pupil than Commonwealth charter schools on facilities.

This analysis suggests that Horace Mann schools are funded comparably to BPS district schools and that the differences in funding and expenditures between Horace Mann schools and Commonwealth charter schools are primarily a result of Horace Mann schools' connection to the district and the services they receive as a result.

SIDEBAR FIGURE 6

Total Expenditures Per-Pupil, FY20

Average Difference in Per-Pupil Expenses for Horace Mann Schools, FY20



Source: Authors' analysis based on [Charter School End of Year Financial Report \(CSEOFYR\)](#); DESE.

Note: Column data may not sum to total due to rounding.

Horace Mann schools’ budget autonomy enables them to enjoy varying degrees of operational autonomy. School leaders can allocate their funds around the learning model, curriculum, and professional development with a greater degree of discretion (Table 6). All types of schools must gain approval for their learning model, curriculum, professional development plan, and school calendar. The key difference in terms of this set of autonomies is in what entity (or set of entities) must approve those decisions.

Table 6 > Operational Autonomies for Massachusetts’ Autonomous Public School Models

	Commonwealth Charter Schools ⁵⁴	Horace Mann Schools ⁵⁵	Innovation Schools ⁵⁶	Pilot Schools ⁵⁷	Receivership Schools ⁵⁸
Learning Model	Define a learning model at the school level, which must be approved by the authorizer in the school’s charter contract	May implement a nontraditional learning model if approved in their charter	May establish a nonstandard learning model if outlined in the Innovation plan and approved	May adopt a nonstandard learning model if approved in the Pilot school plan and approved by the school’s governing board	In creating a turnaround plan, the commissioner and receiver “may expand, alter, or replace the curriculum and program offerings”
Curriculum	Have complete autonomy to determine curriculum at the school level	May select curriculum and materials and define promotion and graduation requirements above and beyond those of the local district	May select curriculum and materials	May select curriculum and materials and define promotion and graduation requirements above and beyond those of the local district	In creating a turnaround plan, the commissioner and receiver “may expand, alter, or replace the curriculum and program offerings”
Professional Development	May determine the providers, goals, and schedule for professional development	May determine the providers, goals, and schedule for professional development	May determine the providers, goals, and schedule for professional development	May determine the providers, goals, and schedule for professional development	In creating a turnaround plan, the commissioner and receiver may provide for increased professional development and planning and collaboration time

Table 6

Operational Autonomies for Massachusetts' Autonomous Public School Models, *continued*

	Commonwealth Charter Schools ⁵⁴	Horace Mann Schools ⁵⁵	Innovation Schools ⁵⁶	Pilot Schools ⁵⁷	Receivership Schools ⁵⁸
Schedule and Calendar	Have complete autonomy to design a daily and yearly schedule at the school level	May extend the school day or year, increase professional development, define a master schedule specific to the school, and flexibly deploy teachers' time	Have scheduling autonomies as outlined in an approved Innovation plan	May extend the school day or year, increase professional development, define a master schedule specific to the school, and flexibly deploy teachers' time	In creating a turnaround plan, the commissioner and receiver may extend the school day or year

Commonwealth charter schools don't need approval in any capacity from a local school district to choose a learning model, select and purchase curricular resources, deliver professional development, or design their own schedule and calendar. Rather, school leaders include those decisions in their charter application, which must be approved by BESE. Receivership schools also can exercise these autonomies without local district approval, requiring only the approval of the state commissioner. Innovation and Pilot schools must have any nonstandard operational decisions approved locally.

Horace Mann schools must include these decisions in their applications, which must be approved by BESE, the local school committee, and the local union. What this means for Horace Mann schools is that the degree to which they can adopt new, different, or innovative learning models or curricula depends on the extent to which the local school district and union are willing to allow it. This may create an incentive for Horace Mann school leaders to stay within more traditional boundaries when it comes to designing their schools, as the stakes of approval are high and proposing something out-of-the-box increases the risk of rejection.

SECTION II

To What Extent Has the Horace Mann Model Realized the Original Goals Laid Out in Statute?

As previously described, Massachusetts' 1997 legislation, An Act Relative to Charter Schools, created Horace Mann schools and raised the cap on Commonwealth charter schools. The Massachusetts legislature established Horace Mann schools to bridge the gap between Commonwealth charter schools,⁵⁹ which are completely separate from the district, and traditional district-operated schools. The act reaffirmed the six original purposes of charter schools outlined in the 1993 Education Reform Act and added a seventh.⁶⁰ We've grouped these seven purposes into four pillars to conduct our analysis (Table 1).

While there have been some bright spots and exciting opportunities created for students, our analysis suggests that overall, Horace Mann schools haven't realized the original vision, largely due to policy design and implementation challenges that have inhibited them from embracing the full potential of their autonomy.

Table 1
Repeated

Four Pillars of the Original Goals for the Horace Mann School Model

Pillar	Goal(s) Outlined in Statute
Serve as Labs of Innovation	<ol style="list-style-type: none"> 1. To stimulate the development of innovative programs within public education. 2. To provide opportunities for innovative learning and assessments. 3. To provide teachers with a vehicle for establishing schools with alternative, innovative methods of educational instruction and school structure and management.
Share Best Practices	<ol style="list-style-type: none"> 4. To provide models for replication in other public schools.
Offer More Opportunities for Choice	<ol style="list-style-type: none"> 5. To provide parents and students with greater options in choosing schools within and outside their school districts.
Improve Student Outcomes and Strengthen School Accountability	<ol style="list-style-type: none"> 6. To encourage performance-based educational programs. 7. To hold teachers and school administrators accountable for students' educational outcomes.

Source: An Act Relative to Charter Schools, Ch. 46, General Court of the Commonwealth of Massachusetts (1997).

PILLAR **Serve as Labs of Innovation**

Charter schools were originally created to empower school leaders and teachers with autonomy and flexibility to design innovative, high-quality schools.⁶¹ They're afforded broad flexibility in exchange for heightened accountability, which is meant to help encourage school leaders to "test, validate, and adopt new practices within a public school environment."⁶² To this end, Massachusetts legislation outlines three related purposes for charter schools: "1) to stimulate the development of innovative programs within public education; 2) to provide opportunities for innovative learning and assessments; and 3) to provide teachers with a vehicle for establishing schools with alternative, innovative methods of educational instruction and school structure and management."⁶³

Our analysis suggests that, on the whole, Horace Mann school leaders have been able to leverage their autonomies, in particular budget and staffing autonomy, to operate specialized programs that meet the needs of their schools and students. The autonomies may not be *essential* to operating these programs — some district leaders we spoke with believe the same would be possible within traditional district schools — but they certainly helped.

The Horace Mann school leaders we spoke with point to budget and staffing autonomies as most critical for implementing the programs and services that meet their schools' and students' needs. Budget autonomy permits school leaders to opt in or out of certain district-provided services (e.g., food service or printing), roll over funds from one year to the next,

Horace Mann school leaders have been able to leverage their autonomies to operate specialized programs that meet the needs of their schools and students.

directly access state and federal grant funds, and procure supplies directly and quickly.⁶⁴ Horace Mann schools' ability to access federal funds directly was noted as a major benefit during the COVID-19 pandemic, when the federal government began providing schools and districts with emergency funding. Horace Mann schools were able to apply for and receive these funds directly from the federal government. On the benefit of receiving federal funds directly, one school leader noted, "Whether it's Title I funds or other funds, when it goes to you directly, you have more control."⁶⁵ As a result, Horace Mann schools didn't have to wait to purchase personal protective equipment or to hire additional staff to help address the learning needs emerging among their students.

Staffing autonomy not only helps Horace Mann school leaders hire the staff they need to implement their school model, but it also contributes to a healthy culture and a shared sense of mission.

Staffing autonomy not only helps Horace Mann school leaders hire the staff they need to implement their school model, but it also contributes to a healthy culture and a shared sense of mission. While all Horace Mann school teachers are members of their local teachers union, Horace Mann school leaders have flexibility to determine the staffing pattern that best serves their school and students. This includes the ability to excess staff that "don't fulfill the needs of the school" and hire staff from outside the district's teaching pool.⁶⁶ And although all teachers join their local union once hired, school leaders can negotiate working conditions, such as an extended workday or calendar year, with the local union and codify any changes in an MOU.⁶⁷ This staffing flexibility was critical for UP Academy, for example, which currently runs two Horace Mann schools in Boston. Both UP Academies operate on a longer school day (two hours more than Boston's traditional district schools) and a longer school year (starting about two weeks earlier than BPS).⁶⁸ While it was no small feat to gain approval from the various parties that must sign off on a Horace Mann school, including the UP board, the Boston Teachers Union (BTU), the Boston school committee, and, ultimately, BESE, UP was successful and the schools were able to adopt a model they believed would better serve the students in their care.⁶⁹

Staffing flexibility has also allowed Boston Day and Evening Academy, an alternative school for students who haven't received the necessary tools or support in other school settings,⁷⁰ to forge an agreement with the BTU that allows for 20% of teachers' workweek to be self-directed. During this time, teachers self-select into one of four workgroups: 1) Making Boston Day and Evening Academy an Anti-Racist Institution, 2) Strengthening Student Programming, 3) Data Systems Design, or 4) Bolstering Student Attendance. Each workgroup is responsible for a set of strategic priority benchmarks.⁷¹ This contributes to a school where teachers have a voice in school culture, teaching methods, student programming, curriculum, and other core decisions that address the needs of their unique student populations.

In addition to using budget and staffing autonomy to meet the needs of their students, Horace Mann school leaders have been able to develop approaches to teaching and learning that differ significantly from what's offered in local district schools: Edward M. Kennedy Academy and Boston Green Academy, for example, both offer career pathways for high-demand occupations in Massachusetts and nationally. Boston Day and Evening

Academy is an alternative high school educating students whose needs haven't been met in other high schools using a competency-based, student-centered teaching and assessment system.⁷² Dudley Street School is part of a K-12 STEM pathway in partnership with Dearborn STEM Academy.⁷³ And the two UP Academies use a student-driven curriculum that fuses the "best of the one-room schoolhouse model with today's technology" to allow for a student-driven curriculum.⁷⁴

It's notable that nontraditional school models that extend the school day, serve overage students, and offer career pathways have tended to emerge under the Horace Mann model.

While many of the innovations that Horace Mann schools have embraced are possible within the district, it's notable that nontraditional school models that extend the school day, serve overage students, and offer career pathways have tended to emerge under the Horace Mann model. The collective bargaining agreement between BPS and the BTU permits traditional district schools to "set their master schedule and adjust the length of their instructional blocks" with approval from 55% of the staff.⁷⁵ A BTU representative noted that creating schools with "a career focus, vocational pathways, and dual enrollment," which many of the Horace Mann schools have, are all options available to traditional schools.⁷⁶ Yet it may be that the specific autonomies unique to Horace Mann schools (and other autonomous schools in Boston, many of which also operate nontraditional programs) are enough to tip the scales toward more innovative approaches. It's also possible that the political and policy challenges Horace Mann schools face in securing approval and support for their school models from the district would make doing the same insurmountable for a traditional district school. Or it may be that the autonomies provided to Horace Mann schools help them attract leaders able to navigate the system while maintaining their vision. Regardless, the fact is that Horace Mann schools today are operating programs that lack many corollaries among traditional district schools.

PILLAR

Share Best Practices

Horace Mann schools were meant not only to be labs of innovation but also to share best practices and lessons learned through those innovations with other schools, in order to "provide models for replication in other public schools,"⁷⁷ as the Massachusetts charter school law stipulates.

Horace Mann schools can disseminate their successes and lessons learned in both formal and informal ways. Formally, Massachusetts law places the onus for disseminating best practices on the school committee of the district in which the Horace Mann school operates: "The school committee of each district where a Horace Mann charter school is located shall develop a plan to disseminate innovative practices of said charter school to other public schools within the district."⁷⁸ It further directs the state commissioner of education to "facilitate the dissemination of successful innovation programs of charter schools and provide technical assistance for other school districts to replicate such programs."⁷⁹

Massachusetts has few systems in place to support the dissemination of best practices among Horace Mann schools and other public schools.

Despite the requirements outlined in law, Massachusetts has few systems in place to support the dissemination of best practices among Horace Mann schools and other public schools. The DESE hosts a website titled “Charter Schools: A Guide to the Dissemination of Best Practices,”⁸⁰ which includes a section focused on “creating conditions for successful dissemination.”⁸¹ There’s little else beyond that – providing little support for Horace Mann schools to fulfill this piece of the vision.

Outside of formal state and district structures, Horace Mann schools are required in their charter application to develop a process to share their successes and innovations with other public schools.⁸² Each school’s approach to dissemination differs. For instance, Boston Day and Evening Academy hosts a REAL Summer Institute that instructs and coaches educators in “student-centered, competency-based, and trauma-sensitive programming.”⁸³ Dudley Street School shares its collaborative staffing model and annually hosts a “Learning Site” for early-career teachers, including those working in BPS’ district schools.⁸⁴

Informal sharing of best practices also happens through networking among school leaders. One school leader noted that in the early 2000s, BPS’ autonomous schools would “have a conference where we would share best practices. [However], we haven’t seen that [level of activity] in over 10 years.”⁸⁵ Another described the “active” network of autonomous schools that existed many years ago and described some early signs that this network may be “reactivating a bit” in reaction to recent decline in support for school autonomy among BPS leadership.⁸⁶

Perhaps the most direct way that Horace Mann schools disseminate and share best practices is by taking over low-performing schools and implementing those practices directly. Several Horace Mann schools have launched as school restarts,⁸⁷ such as Boston-based schools including Boston Green Academy,⁸⁸ UP Academy Boston,⁸⁹ and UP Academy Dorchester.⁹⁰ This approach has the added benefit of providing a long-term, ongoing model of best practices for other schools to observe and learn from.

Though Horace Mann schools are indeed disseminating best practices, without overarching structures and systems to connect autonomous leaders and enable knowledge-sharing on a more formal, larger scale, this pillar of the original vision will remain largely dependent on informal channels. This may include collaboration among Horace Mann schools themselves or even harder-to-quantify effects that Horace Mann schools may have on the district, whether by creating competitive pressure for student enrollment or by creating inspiring proof points of what’s possible.

Offer More Opportunities for Choice

Providing more options to families to find a school that meets the needs of their children is a core pillar of both the charter school movement in particular and of district-led efforts to open new, autonomous schools more broadly. The legislation creating Horace Mann schools outlined this purpose in this way: “to provide parents and students with greater options in choosing schools within and outside their school districts.”⁹¹

Like Commonwealth charter schools, Horace Mann schools are not limited by neighborhood assignment. Any student living in a district where a Horace Mann school exists can apply to attend that school by participating in the enrollment lottery.⁹² This means that Horace Mann schools that offer a certain programming focus (e.g., health careers) or serve a particular student population (e.g., students who have struggled elsewhere) are available to all students in the district, expanding choices for families.

Horace Mann schools expand the choices available to families by filling in the gaps of what the local district can offer or by offering a complement to existing options. Barnstable Community Charter School, for example, served students from all seven villages within the Town of Barnstable,⁹³ creating a diverse and blended school community that was different from the demographics of the district’s other schools, which were populated based on neighborhood boundaries.⁹⁴ Silver Hill Horace Mann Charter School, in Haverhill, deeply integrated technology into its classrooms.⁹⁵ The Boston Plan for Excellence, which operates one Horace Mann and one Receivership school in Boston, has paired the two schools together to create a K-12 STEM pathway in the Dudley Square neighborhood of Roxbury.⁹⁶

The three Horace Mann high schools in Boston each provide programming that either isn’t available elsewhere or is limited within the district. Edward M. Kennedy Academy and Boston Green Academy both offer state-approved career and vocational technical education programming, often called “Chapter 74” programs in reference to the chapter in state law that outlines their requirements,⁹⁷ and designates them as high-quality college and career pathways.⁹⁸ There are only two other high schools in BPS offering Chapter 74 programs, and while one offers health assistance like Edward M. Kennedy Academy, neither provides the environmental science and technology program that Boston Green Academy offers.⁹⁹

Boston Day and Evening Academy is an alternative high school designed to serve students who are over-age, have attendance issues, have been held back in the eighth grade, have dropped out and are eager to get a diploma, or feel “they’re not getting the attention in class that they need to succeed.”¹⁰⁰ It’s one of only three high schools in BPS providing support for students needing special services or a longer-than-average high school tenure. The others are Boston Adult Technical Academy,¹⁰¹ serving over-age students, and Boston Collaborative, which offers three distinct programs for immigrants, expectant mothers, and students needing an online-only platform.¹⁰²

Horace Mann schools expand the choices available to families by filling in the gaps of what the local district can offer or by offering a complement to existing options.

Despite the options that these and other Horace Mann schools have provided to families, just 15 Horace Mann schools ever opened in Massachusetts, and only six remain today, all in Boston (Table 7). This low rate of Horace Mann school openings (and high number of subsequent closures and conversions) has resulted in the Horace Mann school model providing only a modest number of actual options for students and families in Massachusetts.

Table 7 > Current State of Horace Mann Schools

Horace Mann School	Location	Year Charter Granted	Current Status
Amesbury Academy Charter Public School	Amesbury	2001	Converted to Innovation school
Barnstable Community Horace Mann Charter Public School	Barnstable	2004	Converted to Innovation school
Barnstable Horace Mann Charter School	Barnstable	1998	Converted to traditional district school
Bentley Academy Charter School Closing	Salem	2015	Converted to Innovation school
Boston Day and Evening Academy Charter School	Boston	1998	Open
Boston Green Academy Horace Mann Charter School	Boston	2011	Open
Champion Charter Public School	Brockton	1998	Converted to traditional district school
Dudley Street Neighborhood Charter School	Boston	2012	Open
Edward M. Kennedy Academy for Health Careers	Boston	1998	Open
New Bedford Global Learning Charter School	New Bedford	2000	Converted to Commonwealth charter
New Leadership Charter School	Springfield	1998	Closed
New Liberty Charter School of Salem	Salem	2011	Converted to Innovation school
Silver Hill Horace Mann Charter School	Haverhill	2008	Converted to traditional district school
UP Academy Charter School of Boston	Boston	2011	Open
UP Academy Charter School of Dorchester	Boston	2013	Open

Source: Current status for converted schools was by authors' analysis. <https://www.doe.mass.edu/charter/factsheet.xlsx>.

Improve Student Outcomes and Strengthen School Accountability

The autonomy-in-exchange-for-accountability bargain that underpins the charter school model is based on the theory that autonomy is a strong lever to improve student outcomes. It's intended to transfer decisions to those closest to students, such as school leaders and teachers, who have firsthand knowledge of the needs of their students. If schools are better able to meet students' needs, their outcomes should improve.¹⁰³ Massachusetts' charter school law outlines two purposes related to this pillar: "1) to encourage performance-based educational programs, and 2) to hold teachers and school administrators accountable for students' educational outcomes."¹⁰⁴

The Commonwealth charter sector in Massachusetts, and particularly in Boston, is known for being one of the highest performing in the nation.¹⁰⁵ Given that, policymakers and researchers have long sought to understand how Horace Mann schools perform relative to other types of schools. Our review of research studies, student proficiency and growth rates on state assessments, and student graduation and college matriculation rates suggest that the performance of Horace Mann schools isn't clear cut and an updated analysis of student-level data is necessary.

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From the opening of the first Horace Mann school in 1998 until today, three key studies have sought to quantify Horace Mann schools' effect on student outcomes. While the studies' methods and scopes differ, they all point to two similar conclusions: First, attending a Horace Mann school is associated with higher proficiency and growth rates for students compared with the rates of local district schools. Second, Boston's Commonwealth charter schools tend to outperform all types of schools — including Horace Mann schools — in terms of both student proficiency and growth.

The first study, published in 2009, looked at the performance of Massachusetts' charter schools (grouping together the state's Commonwealth charter schools and Horace Mann schools) and Pilot schools. The authors found that charter schools have large positive effects on students' academic outcomes at the middle and high school levels, while the results for Pilot schools were less clear cut (in some cases, students attending Pilot schools seemed to result in students losing academic ground, while in others, results were not distinguishable from zero).¹⁰⁶

Five years later, a Boston Indicators Project Special Report sought to understand whether the school-level autonomy that BPS embraced in the two decades between 1994 and 2014 led to improved academic outcomes for students. The report found that Boston's autonomous schools, including Horace Mann, Innovation, Pilot, and Turnaround, were associated with higher student growth rates than BPS' traditional district schools. Horace Mann schools in particular were associated with higher growth in sixth-grade English language arts (ELA) and math compared with other types of in-district autonomous schools (but less growth than the city's Commonwealth charter schools).¹⁰⁷

The most recent attempt at understanding Horace Mann schools' performance alongside other school types was in 2018, when researchers at the Public Policy Institute compared student growth across Boston's Commonwealth, Horace Mann, Innovation, and Pilot schools. The report found that overall, students at Horace Mann schools showed more annual growth than students in traditional public school districts but less than those attending Commonwealth charter schools.¹⁰⁸

In addition to these studies, there are numerous examples of Horace Mann schools serving high-need students well. For example, Bentley Academy in Salem, which operated from 2015 until 2020, went from Level 4 to Level 1 in its first year as a Horace Mann school, meeting all targets for performance improvement.¹⁰⁹ Head of School Marlena Afonso helped develop approaches for instructional improvement and coaching to achieve this result and noted: "The multi-pronged approach, robust data systems, and time within our day to use data [created] a robust college-going culture."¹¹⁰

Barnstable Community Horace Mann Charter School in Barnstable, which operated from 2004 until 2018, had third graders who were top in the district on the Next-Generation MCAS math testing in 2017. Barnstable Community third graders achieved 68% proficiency in Math and 59% proficiency in ELA — comparable to the top-performing elementary school in the district.¹¹¹

Several low-performing traditional district schools in Boston converted to the Horace Mann model and have since experienced substantial academic improvement. Boston Green Academy became the most improved high school in BPS and one of the most improved statewide within three years of opening in 2011.¹¹² UP Academy Boston was number one statewide in math growth on the MCAS in 2012, 2013, and 2014. In 2012, it was seventh statewide in ELA growth.¹¹³ UP Academy Dorchester was number one statewide in math growth on the 2014 MCAS (with proficiency up 47 points) and sixth that year in ELA growth.¹¹⁴

Two Horace Mann high schools operating in Boston, Boston Green Academy and Edward M. Kennedy Academy, have higher graduation and postsecondary attendance rates compared with BPS overall (Table 8).

Table 8

Graduation and Postsecondary Outcomes for BPS High Schools Versus Horace Mann High Schools

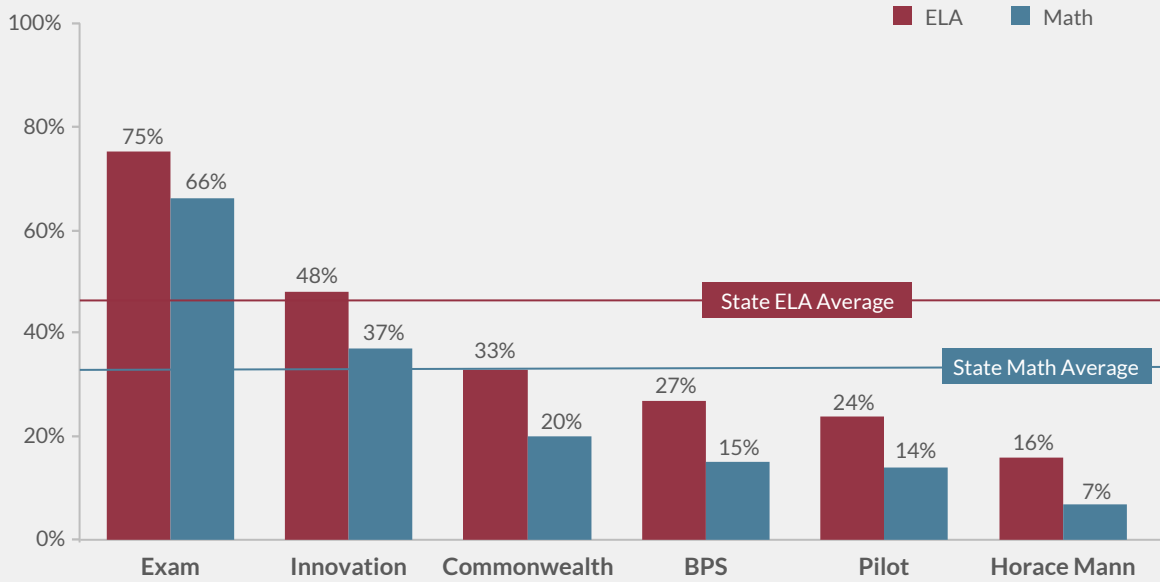
LEA	Four-year Graduation Rate, Class of 2020 ¹¹⁵	Spring 2021 Graduates Planning to Attend Postsecondary ¹¹⁶	Spring 2020 Graduates Attending Institutions of Higher Education as of March 2021 ¹¹⁷
Boston Public Schools (BPS)	75%	63%	51%
Boston Green Academy	81%	69%	53%
Edward M. Kennedy Academy for Health Careers	98%	97%	75%

A review of 2021 MCAS data complicates the narrative, however. Massachusetts uses both student proficiency rates and a student growth percentile (SGP) to assess schools. The SGP measures a student's progress on the MCAS compared with the progress of other students with similar MCAS performance histories. SGPs range from 1 to 99, "where higher numbers represent higher relative growth and lower numbers represent lower growth."¹¹⁸ Proficiency and growth data in Horace Mann schools alongside other types of schools in Boston point to four key takeaways, summarized in the bullets below and shown in Figures 1-4.¹¹⁹ (Note that data for several specialized school types that operate within BPS, including exam schools, Innovation schools, and Pilot schools, are summarized separately, as are data for Commonwealth charter schools. The column labeled "BPS" in all of the figures represents the remaining traditional district schools that BPS operates, once the data for specialized schools [exam, Innovation, and Pilot] are removed.) In the 2020-21 school year:

- The percentage of students attending Horace Mann schools who meet or exceed grade-level proficiency benchmarks in grades 3-8 ELA and math lags that of other school types (Figure 1).
- The percentage of students attending Horace Mann schools who meet or exceed grade-level proficiency benchmarks in grade 10 ELA and math is on a par with, or exceeds, that of BPS' traditional and autonomous schools (Figure 2).
- Average growth rates for students in grades 3-8 attending Horace Mann schools lag other school types in ELA but are similar in math (Figure 3).
- Average growth rates for students in grade 10 attending Horace Mann schools lag other school types in both ELA and math (Figure 4).

Figure 1

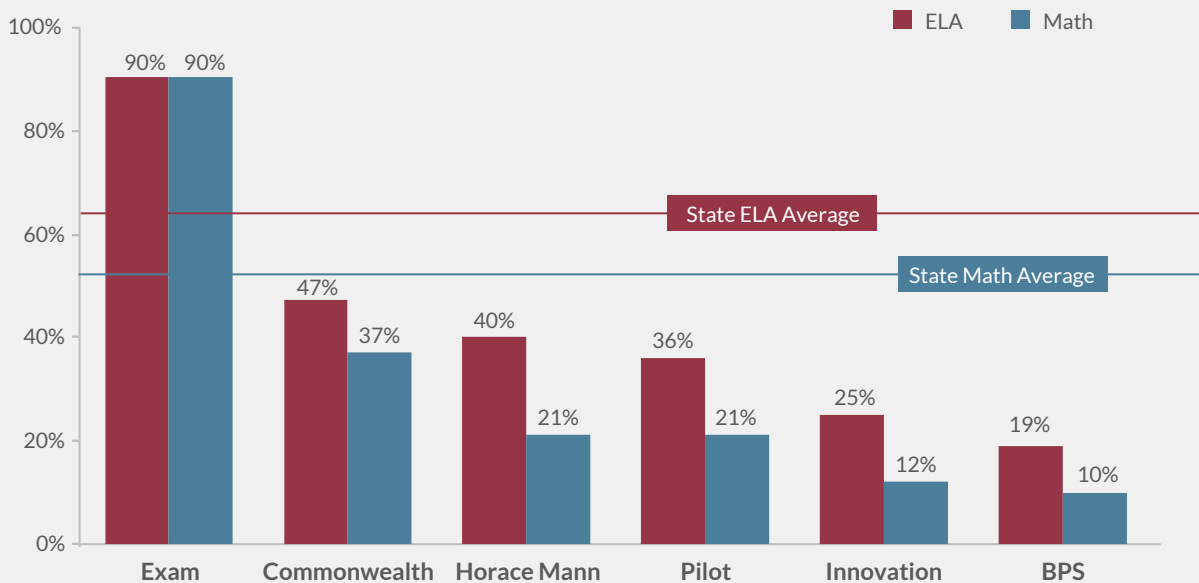
2021-21 Snapshot: Percentage of Students Meeting or Exceeding Grade-level Benchmarks on ELA and Math MCAS, by School Type, Grades 3-8 Combined



Source: Author's analysis of School and District Profiles.

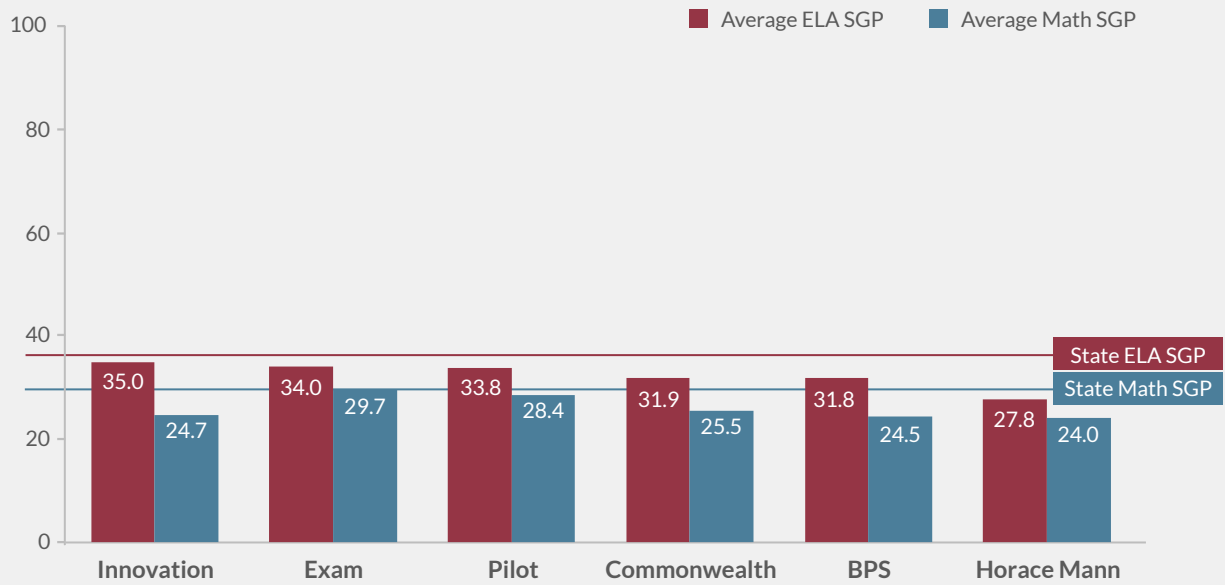
Figure 2

2021-21 Snapshot: Percentage of Students Meeting or Exceeding Grade-level Benchmarks on ELA and Math MCAS, by School Type, Grade 10



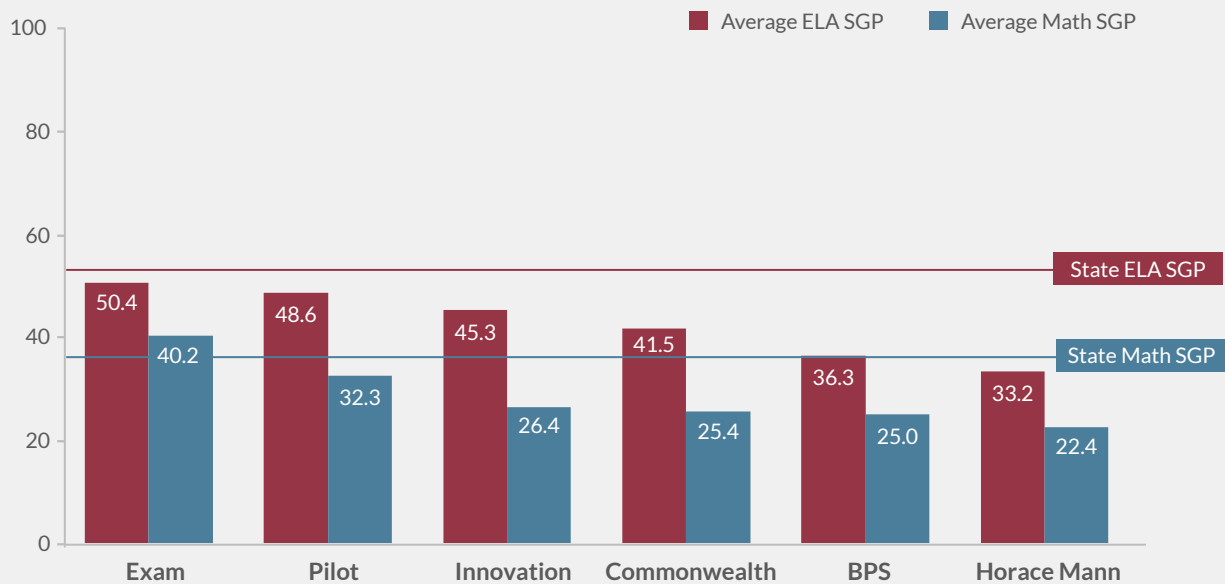
Source: Author's analysis of School and District Profiles.

Figure 3 2020-21 Snapshot: Average ELA and Math SGP by School Type, Grades 3-8 Combined



Source: Author's analysis of School and District Profiles.

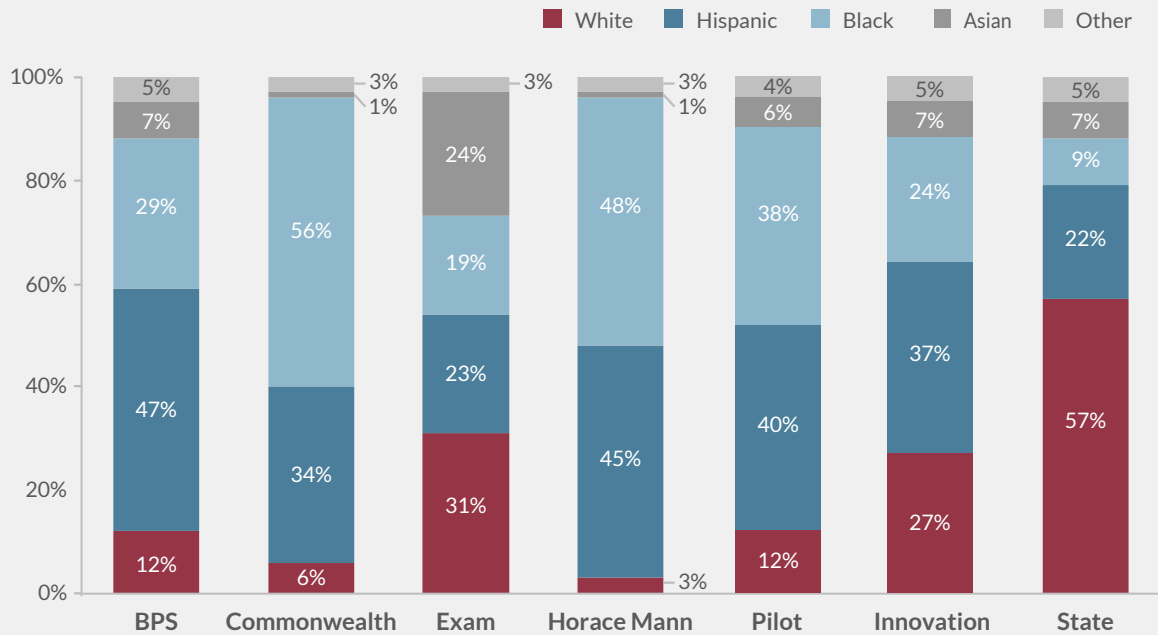
Figure 4 2020-21 Snapshot: Average ELA and Math SGP by School Type, Grade 10



Source: Author's analysis of School and District Profiles.

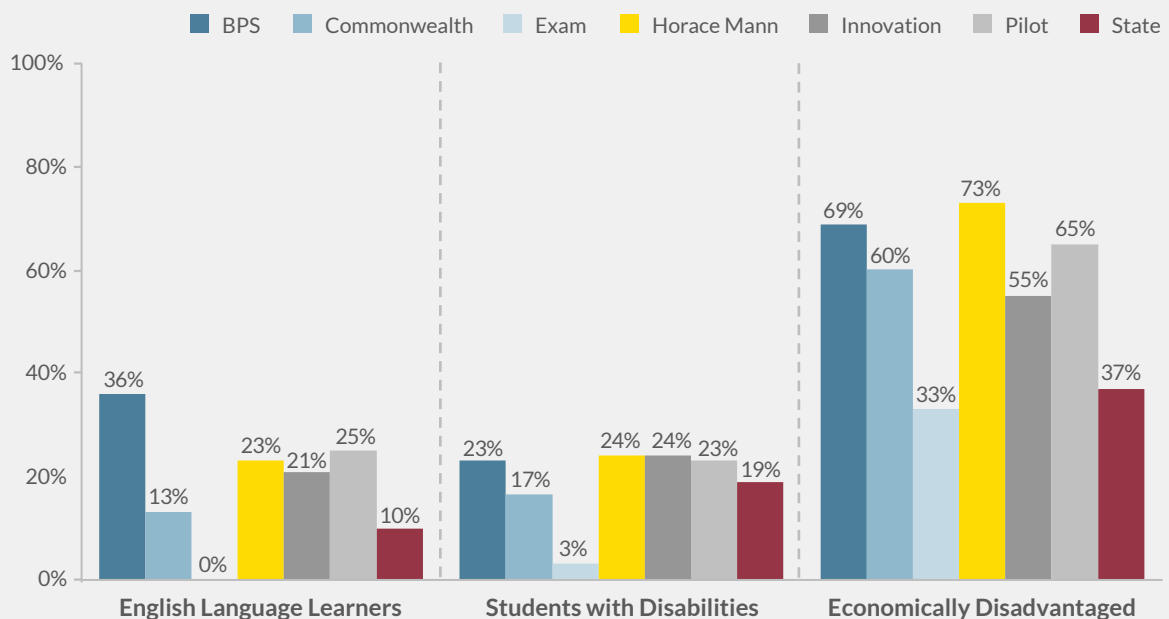
These data are imperfect, however, and several important caveats are worth noting. First, demographic data suggest that Horace Mann schools predominantly serve students of color and also serve a very high-need population of students (Figures 5 and 6).

Figure 5 Percentage of Student Enrollment by Race/Ethnicity and School Type, 2021



Source: Author's analysis of [School and District Profiles](#).

Figure 6 Percentage of Student Enrollment by Subgroup and School Type, 2021



Source: Author's analysis of [School and District Profiles](#).

It's also important to note the limitations of publicly available data on student demographics. For example, within a category like students with disabilities, the Individuals With Disabilities Education Act breaks down disabilities into 14 categories, with varying degrees of severity,¹²⁰ but that isn't captured in these data. On the other hand, these data also don't account for any differences in populations of students that result from selection bias, including the possibility that students who select a school of choice have families that are more likely to be supportive of and engaged in their education.¹²¹

Second, the sample sizes are small for several of these categories. Four Horace Mann schools and four Innovation schools serve students in grades 3-8, for example, representing just a few hundred students each. The BPS category, on the other hand, includes dozens of schools and thousands of students. The school-level comparisons are not apples-to-apples in terms of size. Sample sizes get even smaller when we attempt to look at subgroups of students, such as those who are Hispanic or those who have disabilities. As a result, we look here only at school-level data, rather than subgroup-level data, leaving out an important comparison.

Third, we look only at a limited set of data of reading and math proficiency and growth and graduation rates. There are many other ways to think about school quality, including social-emotional supports, future income, and civic outcomes like voter participation, for which reliable measures and data are even harder to come by.

Finally, the data presented represent only a single school year, and a very abnormal one at that, given the effects that the pandemic has had on schools over the previous two academic years.

The data presented represent only a single school year, and a very abnormal one at that; more rigorous research is needed to fully understand the impact of Horace Mann schools.

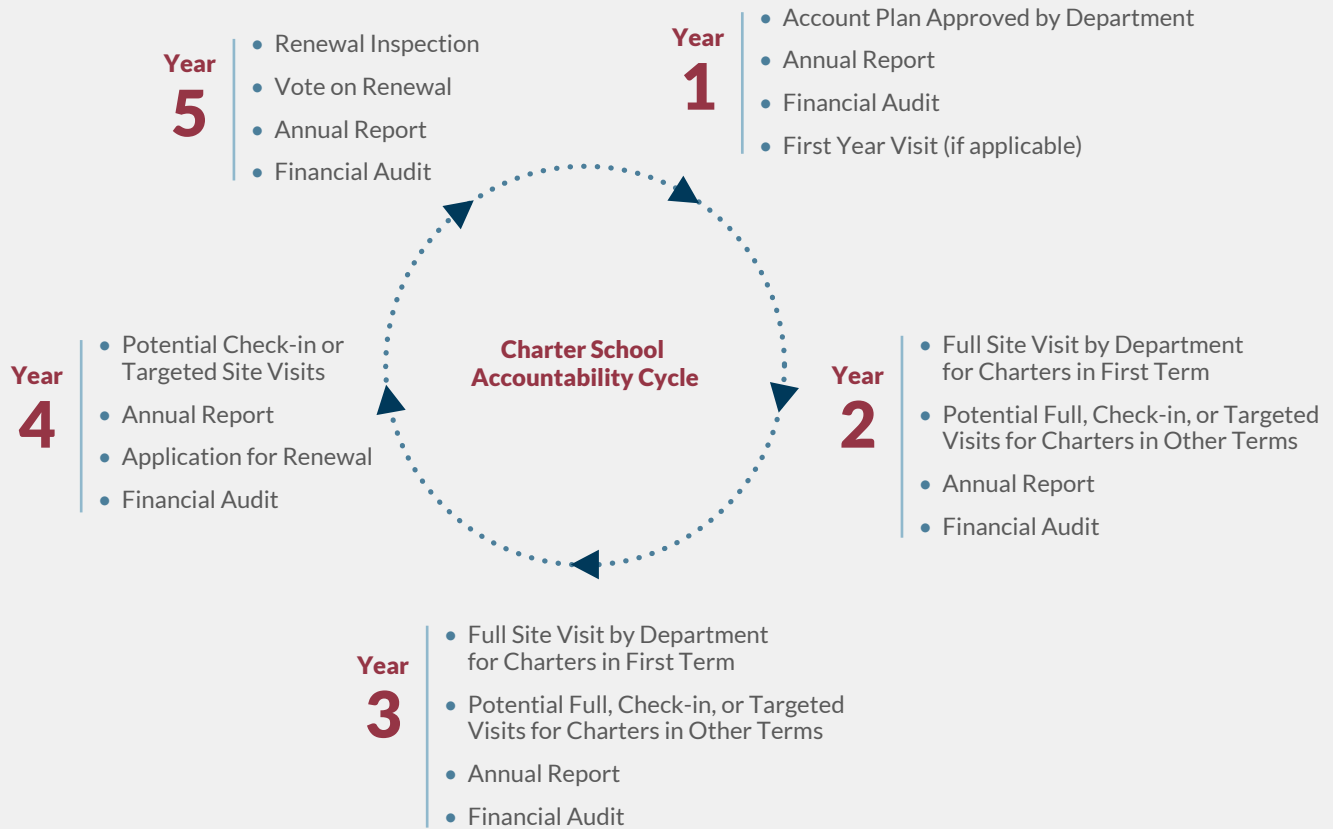
Combined, these data and examples point to some important successes that Horace Mann schools have had in terms of their ability to improve student performance — and underscore the need for further, more rigorous research to fully understand their impact.

In terms of accountability for their outcomes, our analysis of Horace Mann schools' reporting and accountability requirements finds that they are subject to requirements beyond what is required for either Commonwealth charter schools or BPS' traditional district or autonomous schools. This is largely because Horace Mann schools are creatures of both the state and the district; as a result, both levels of government have accountability and reporting requirements for Horace Mann schools.

From a state level, the DESE has created a five-year cycle for charter school accountability (Figure 7). As a type of charter school, Horace Mann schools are subject to this cycle, which includes annual reports, annual financial audits, a renewal application during year 4 (to prepare for renewal in year 5), and regular check-ins and site visits over the course of the school's five-year charter.

Figure 7

Massachusetts Department of Elementary and Secondary Education’s Charter School Accountability Cycle¹²²



Source: Guide to Charter School Accountability, DESE.

DESE also has an accountability system in place to hold individual schools (both charter and district) accountable for their outcomes. This system is based on three primary factors: 1) student performance indicators (e.g., student achievement, student growth, high school completion, chronic absenteeism); 2) progress toward improvement targets compared with other schools; and 3) improvements among the school’s lowest-performing students.¹²³ Based on these data, each school is placed into a category that describes how that school is doing and what kind of support it needs from the state. The lowest-performing schools in the state (approximately the bottom 15%) receive additional assistance or intervention from the state.

Each school district is classified using this same system, based on the results of the district as a whole.¹²⁴ Commonwealth charter schools are classified as separate school districts, as are Horace Mann schools for most purposes¹²⁵ — including for accountability.¹²⁶ As a result, both types of schools receive both a school rating and a district rating through the state’s accountability system (this isn’t the case for Innovation, Pilot, or Receivership schools, as those school models are not classified as independent districts).¹²⁷

At the local level, BPS has implemented the School Quality Framework (SQF) to measure school quality across five areas: “1) student performance, 2) teaching and learning, 3) family, community, and culture, 4) leadership and collaboration, and 5) student access and opportunities.”¹²⁸ Schools are assigned a score from 0 to 100 based on measurements from these five areas, and then placed in a tier from 1 to 4 (with 1 being the highest-performing tier of schools).

The purpose of the SQF is threefold: First, it is a way to capture school quality that includes factors other than just student test scores. Second, it ensures transparency around school quality to promote greater public accountability. And third, it provides information to families to inform school choice.¹²⁹ With a few exceptions (e.g., early education centers, alternative schools), all district schools, including Horace Mann schools, receive an SQF rating.¹³⁰ Boston-area Commonwealth charter schools don’t receive an SQF rating.

Table 9 Summary of State and Local Accountability Processes by School Type

	Commonwealth Charter Schools	Horace Mann Schools	Innovation Schools	Pilot Schools	Traditional BPS Schools
State Charter Accountability Cycle	X	X			
State School Accountability Rating	X	X	X	X	X
State Accountability Rating for Schools that are Treated as Districts	X	X			
Local Accountability Rating (SQF)		X	X	X	X

It's clear that while Horace Mann schools have struggled to improve student outcomes when compared with Commonwealth charter schools, their performance alongside other types of autonomous schools is less straightforward.

Horace Mann schools are subject to all forms of state and local accountability — above and beyond what is in place for either district or Commonwealth charter schools (Table 9). Certainly, enhanced accountability is part of the autonomy-for-accountability deal, but more accountability structures doesn't necessarily equal stronger accountability, and it is easy to imagine that the increased burden these processes place on charter schools may not yield a commensurate benefit in accountability.

It's clear that while Horace Mann schools have struggled to improve student outcomes when compared with Commonwealth charter schools, their performance alongside other types of autonomous schools is less straightforward. Proficiency and growth rates as measured by the MCAS suggest that Horace Mann schools generally don't perform as well as other types of autonomous schools. Other measures of performance — such as graduation rates or overall school improvement — demonstrate much stronger outcomes.¹³¹ Without more recent and rigorous analyses that account for potential differences among students, it's difficult to draw strong conclusions. What is clear is that Horace Mann schools are held to additional accountability and reporting requirements than all other types of autonomous schools operating in Massachusetts.

SECTION III

What Are the Major Barriers that Have Made it Challenging for the Horace Mann School Model to Realize its Original Goals?

As the previous analysis demonstrates, on the whole, the Horace Mann school model has not fully reached the goals set forth in its originating legislation. While Horace Mann schools have provided additional school choices to a modest number of families, and have been able to use their autonomies to implement some programs and policies that differ from district offerings and fill needed gaps in their communities, these successes have been on a limited scale. More than half of the Horace Mann schools that ever opened have since closed or converted (Table 7, page 39), there are few formal channels for Horace Mann schools to share best practices with other public schools at scale, and the evidence is mixed on the extent to which Horace Mann schools have improved student outcomes.

The reasons behind these outcomes vary with the unique context of each individual school. However, our analysis has identified two key, underlying issues that have made it difficult for Horace Mann schools to fully realize the autonomies they've been promised, which has stifled their ability to achieve the goals set out for them at their inception:

- 1 The intersection of the Horace Mann school policy design and state and local politics.
- 2 Complex implementation challenges at the local level.

Intersection of Policy Design and Politics

Horace Mann schools' approval process is unlike that of any other type of autonomous school operating in Massachusetts. While they must be approved by BESE like Commonwealth charter schools, they must also secure the approval of the local school committee and the teachers union.¹³² This multilevel approval process was designed to ensure a close and mutually agreeable partnership between a Horace Mann school and its local district.¹³³ However, this policy design has had the unintended consequence of leaving Horace Mann schools vulnerable to changing politics and priorities at the state and local levels.

From the beginning, charter schools have faced political opposition in Massachusetts. The legislation creating charter schools capped their existence at just 25 statewide. Though that cap has been raised several times since then, it remains one of the strictest in the nation, at a total of 120 charter schools, 72 Commonwealth, and 48 Horace Mann schools.¹³⁴ The prevalence of charter schools is further limited in individual districts by spending limits set out in law: Individual districts can spend a maximum of 9% of their net school spending on per-pupil payments to Commonwealth charter schools (the limit is 18% in low-performing districts).¹³⁵

In 2016, the state voted on a ballot initiative, Question 2, to raise the cap to allow the approval of up to 12 new or expanded charter schools annually. Despite significant investment from charter funders and advocates, the initiative failed, garnering just 38% of the vote.¹³⁶ There has been little political support for expanding the charter sector since. One former BPS administrator observed that the “complete trouncing” of Question 2 changed the education landscape, noting that during the Obama era and Race to the Top, there was more support for school autonomy: “It has become a lot more politically easy and comfortable to bash charter schools and autonomous school models. They’re perceived as anti-teacher [and] anti-everything.”¹³⁷

Instead of bridging the gap between charter schools and local school districts, Horace Mann schools find themselves stuck in the middle, in large part because their name, Horace Mann charter schools, is associated with Commonwealth charter schools rather than district schools. As a longtime Massachusetts education leader observed: “[Horace Mann schools] have the word ‘charter’ in them. That’s a problem. Explaining that they’re not the bad guys is hard to do right now. You have to say ‘Horace Mann charter school’ but quickly follow that up with, ‘We’re not one of *those* charters.’”¹³⁸

Representatives from both the teachers union and BPS have made it clear that they don’t see the need to open additional Horace Mann schools. Asked about the possibility of expansion in Boston, a BTU representative replied with an emphatic “no.”¹³⁹

Even so, leaders of Boston’s six Horace Mann schools have developed strong working relationships with the local teachers union, which has helped them have more staying power than those in other districts across the state. Between 1998 and 2015, nine

Horace Mann schools opened outside of Boston. All have since closed or converted to another school type (Table 7, page 39). In several of the most recent closures, union opposition and shifting priorities among district leadership has directly led to the elimination of Horace Mann schools.

In 2018, for example, after nearly 14 years as a Horace Mann school, Barnstable Community Horace Mann Charter Public School's charter was not renewed following a 4-1 vote by the school committee.¹⁴⁰ Statements by committee members at the time suggest a desire to have the school back under the governance jurisdiction of the local school district.¹⁴¹ The school was subsequently converted to an Innovation school and remains open.¹⁴²

Silver Hill Horace Mann Charter School in Haverhill, whose charter was not renewed in 2018 following a decade of operation as a Horace Mann school, had strong support from the school's teachers but lacked the necessary support of the local teachers union. The school had received support from the teachers union for its initial approval and its first renewal. When the school came up for renewal a second time, the teachers working in the school were "overwhelmingly in favor" of continuing to operate the school as a Horace Mann, with 96% casting a preliminary "yes" vote in fall 2016. However, for its second renewal, an unexpected interpretation of statute led to a vote by the full union — rather than just the teachers in the school — and did not garner the necessary support. The school reverted to a traditional district school.¹⁴³

The most recent example of politics impacting the future of a Horace Mann school is Bentley Academy Charter School in Salem. Bentley Academy was a low-performing district school that converted to a Horace Mann school in 2015 in an effort to turn around its performance. According to someone who helped design the school's turnaround strategy, "five years in, the school had improved and was showing good results. The faculty was happy, and the community in Salem was happy."¹⁴⁴ However, school leaders felt a "charter renewal was not feasible within the current political environment,"¹⁴⁵ and, rather than risk nonrenewal, the school's board of trustees voted in May 2019 "to convert from a Horace Mann charter school to an in-district Innovation school, reflecting the consensus of stakeholders to move in this direction."¹⁴⁶

The potential threat of nonrenewal at the hands of the teachers union or school committee no doubt dampens prospective school leaders' enthusiasm for opening new Horace Mann schools.

The limited political support for charter schools, including Horace Mann schools, poses a key challenge to the Horace Mann school model on several fronts. First, the potential threat of nonrenewal at the hands of the teachers union or school committee no doubt dampens prospective school leaders' enthusiasm for opening new Horace Mann schools. It may also inhibit Horace Mann school leaders' ability and willingness to be innovative and push the limits of tradition. Being too different risks never getting off the ground or failing to receive the necessary support during subsequent five-year renewal cycles. This push-and-pull between innovation and needing approval from multiple bodies with varying perspectives on school autonomy is a major challenge for current and prospective Horace Mann school leaders.

There are very real challenges and barriers that come with implementing autonomous school models within a traditional school district.

Complex Implementation

While the limited support for Horace Mann schools in Boston and statewide is frustrating to school leaders and other advocates of the model, there are very real challenges and barriers that come with implementing autonomous school models within a traditional school district. Having even a single Horace Mann school in a district of otherwise traditionally operated schools requires that districts have in place separate processes to accommodate the Horace Mann school's autonomies. Depending on the exact contours of the school and which autonomies it has chosen and been approved to implement, that could mean a district may need a separate budgeting process, enrollment process, and transportation logistics. It may also mean, depending on the degree of centralization within that district, that students use different textbooks and curricula, teachers attend different professional development, and that a subset of families have siblings in different schools operating on competing schedules. These are complex logistics for a district to operationalize — and for families to navigate.

These challenges are even more acute in Boston, where the six remaining Horace Mann schools represent just a handful of the dozens of schools across the district with varying degrees of autonomy (including Innovation, Pilot, and Receivership schools).

There are many examples of how these challenges play out on the ground. For example, transportation logistics — already very complex — are further complicated when individual schools operate on different schedules or enroll students from across the district. Because Horace Mann schools are available citywide and BPS must provide transportation to the students who enroll in them, the practical logistics of transporting students from all over the city can create inefficiencies and inflate the district's transportation costs, according to a BPS administrator.¹⁴⁷

The school budgeting process is also more complex when it comes to accommodating autonomous schools, including Horace Mann schools, creating confusion at both the school and district levels. A former BPS central office administrator reflected on loving the *concept* of budget autonomy but noted that “in practice, there are long-standing systems and structures in place that make it nearly impossible to administer with fidelity to its ideals.”¹⁴⁸

District leaders also find the budgeting and opt-in/opt-out processes difficult. Timelines and mandated programming are two particularly complex areas. In terms of timelines, a former BPS central office administrator noted that school budgets are put together in January, including the staff budget, and opt-out decisions are due by the end of January if they involve letting staff members go, in accordance with the teachers union contract.¹⁴⁹ One former BPS central office administrator noted the challenge of getting a budget together and making staffing decisions in a few short weeks: “There is very little time to adjust staffing levels in the central office based on the opt-in and opt-out choices made by autonomous schools. As a result, we'd often fully staff the services regardless, which is inefficient from a budgeting standpoint and not in the spirit of the initiative in the first place.”¹⁵⁰

Budgeting related to mandated programming is also a challenge. While Horace Mann schools cannot opt out of *all* district-operated services and provide them to students on their own (they can't, for example, opt out of district-provided English language support due to a 2012 settlement with the U.S. Departments of Justice and Education),¹⁵¹ they do have flexibility to opt out of some district services. The process is “always a negotiation” that can involve going over services on a student-by-student basis, both to ensure that students are getting the services they're entitled to by law and to give schools money back for the services the school – rather than the district – is providing.¹⁵²

Keeping track of which autonomous schools opt in or out of which services is also a complicated endeavor for central office staff. A former BPS administrator said, “It was a real challenge for us to enforce those [opt-out] decisions.”¹⁵³ And trying to clarify the process and answer questions requires considerable effort by the central office: “We did a lot of communications work during my time to help school leaders understand how this works.”¹⁵⁴

A final example of the complexity of operating Horace Mann schools in particular is the student enrollment process. BPS has recently returned to a focus on neighborhood schools,¹⁵⁵ and provides each student in grades K-8 with a list of school options within a one-mile radius of their home.¹⁵⁶ Families can rank their choices, and an algorithm ultimately makes student assignments.¹⁵⁷ (Boston's high schools all remain citywide options, meaning any student in Boston is eligible to apply to any of the city's 33 high schools.)¹⁵⁸

The process isn't that straightforward for families wishing to enroll their children in a Horace Mann school, however. First, Horace Mann schools serving students in grades K-8 will show up on a student's BPS-generated list of schools only if the student lives within a one-mile radius of it,¹⁵⁹ meaning that not all families of K-8 students have equal access to information about available Horace Mann school options. Second, all Horace Mann schools, regardless of grades served, must enroll students through a lottery if they're oversubscribed,¹⁶⁰ and each school has its own separate application process that families must go through to put their child's name in that lottery. Therefore, ranking a Horace Mann school through BPS' process doesn't mean a student has actually applied to attend the school – families must take an additional step. This is a major hurdle for many families.

Implementation complexity is compounded in Boston by substantial turnover in district leadership and staff.¹⁶¹ Since the mid-2000s there has been limited leadership stability within BPS and a revolving door of six superintendents, including three interim leaders.¹⁶² One Horace Mann school leader said, “Things in BPS can feel like so much upheaval and transition each year.”¹⁶³

This leadership turnover has led to inconsistent implementation of the district's vision as it relates to school autonomy. A former BPS central office administrator acknowledged a lack of “consistent sustained leadership at the top of the district to prioritize, honor, and value that autonomy. [They need to] give more decision-making autonomy at the

Implementation complexity is compounded in Boston by substantial turnover in district leadership and staff.

school level.”¹⁶⁴ More recently, this inconsistency has turned into a lack of support for and prioritization of autonomy within the district.¹⁶⁵ Others noted “historically strong interest”¹⁶⁶ in a portfolio model, where a district coordinates common systems across a set of autonomous schools rather than operating schools directly and managing them centrally,¹⁶⁷ which has since diminished.

Current Horace Mann school leaders spend a lot of their time creating, maintaining, and navigating relationships.

The turnover and diminishing support have left Horace Mann school leaders in a tough position, having to navigate a system that isn’t set up to support their school models and a constantly changing team in the BPS central office. Current Horace Mann school leaders spend a lot of their time creating, maintaining, and navigating relationships. A Horace Mann school leader described this as “a relational bureaucracy” — where the only way to get things done is to know someone.¹⁶⁸ However, high rates of turnover make “knowing someone” who can get things done an increasingly difficult task.¹⁶⁹ As one state administrator described it, “We’re dealing with a loss of knowledge about Horace Manns at the district level. As original folks at the district leave, fewer people understand what Horace Manns are and how to support them.”¹⁷⁰

Ultimately, the on-the-ground complexities of implementing even a single Horace Mann school in a district are a deterrent for both the teachers union and school committee to sign off on a Horace Mann school. Even in Boston, where the district has decades of experience operating various types of autonomous school models, these complexities often preclude widespread support from within the district. As a former BPS central office staff member noted, “It’s not impossible to do it well, but it would require leadership that’s either willing to adjust systems or be willing to invest in [autonomous schools and their needs].”¹⁷¹

SECTION IV

Where Can the Horace Mann Model Go from Here?

School districts across Massachusetts must continue to seek better ways to try new approaches to meeting the needs of students. Horace Mann schools can be one tool in policymakers' toolboxes toward that goal.

While it's clear from this analysis that the original goals for the Horace Mann model haven't been fully realized, it's critical to contextualize this overarching finding within the policy design and implementation challenges that the schools have faced along the way. Intractable politics and implementation challenges have created an environment where Horace Mann schools, meant by design to be largely autonomous, haven't been able to truly embrace their full autonomy.

Despite these challenges, this shouldn't be the end of the road for the Horace Mann school model. Outcomes in both Boston and statewide for historically underserved groups of students continue to be poor.¹⁷² Until that changes, school districts across Massachusetts must continue to seek better ways to try new approaches to meeting the needs of students. Horace Mann schools can be one tool in policymakers' toolboxes toward that goal.

To that end, we're offering two potential paths forward for the Horace Mann school model — one that preserves and supports existing schools without adding new schools, and a second that offers a bolder vision where Horace Mann schools are a core component of district planning and reform efforts.

To preserve and support existing Horace Mann schools, state and district leaders must improve and clarify existing policies and structures.

PRESERVING AND SUPPORTING EXISTING HORACE MANN SCHOOLS: RECOMMENDATIONS FOR STATE LEADERS

At the state level, DESE must:

Consider ways to provide high-quality, long-standing Horace Mann schools with greater stability: An ongoing challenge for Horace Mann schools is the need to obtain school committee and union approval at the outset (for HMIs and HMIIIs), and at every five-year renewal benchmark (for all three types of Horace Mann schools). While this is done in part to encourage an ongoing partnership between the district and the school, it also means that Horace Mann schools are subject to shifting political winds and changes in leadership vision and priorities, since there are no set criteria for earning school committee and teachers union approval the way there are set criteria for state-level reauthorization. That can have unfortunate consequences for schools, as was recently the case in both Barnstable and Salem.

For Horace Mann schools that have proven themselves over a few years and renewal cycles, DESE should consider working with other state policymakers to create opportunities for them to achieve greater stability, perhaps through longer authorization cycles, a reduction in the number of entities that must approve their continued existence during each cycle, or the development of clear criteria for earning union and district approval during renewal cycles. Doing so would create greater longevity for Horace Mann schools, ensure performance and not politics are the basis for renewal decisions, and limit the burden for review. The promise of greater stability over the longer term may also encourage new applicants.

Partner with BPS to help the district clarify its approach to autonomy: Turnover among BPS leadership and central office staff has created uncertainty and a lack of clarity around the district's approach to autonomy. As DESE partners with BPS to address the district's persistent challenges,¹⁷³ part of that work must include clarifying the district's approach to autonomy and, critically, ensuring that that approach is aligned with state law and policy regarding Horace Mann schools and the autonomies to which those schools are entitled. DESE may consider creating frameworks or other support documents to help district leaders understand their responsibilities as they relate to supporting Horace Mann schools to implement their autonomies, including autonomies that are negotiable and those codified in statute.

Provide training and support to school leaders: One of the challenges that Horace Mann school leaders raised was the limited support available to help them navigate their autonomies and use them to their fullest potential. Many of the school leaders in Boston's Horace Mann schools in particular have been in their positions for years and

have seen a variety of state and district leaders come and go, creating little stability in terms of expectations or in how autonomies are overseen, enforced, and provided. They spend much of their time navigating relationships among various parties to protect their schools and the autonomies they have, while receiving limited support. They're also not able to join Massachusetts' Charter Public School Association,¹⁷⁴ leaving them to seek out professional development and training individually or among themselves in their small group of leaders.

The state could be an important source of support for Horace Mann school leaders by providing them with regular training about the autonomies they have and how to use them, and by giving access to opportunities to learn from and hear from leaders of autonomous schools elsewhere in the state — or even in the nation, given the limited number of Horace Mann schools in Massachusetts today.

PRESERVING AND SUPPORTING EXISTING HORACE MANN SCHOOLS: RECOMMENDATIONS FOR LOCAL LEADERS

Given that the only remaining Horace Mann schools are all located in Boston, **BPS leaders** must take specific steps to ensure these schools have the resources they need to continue to be good partners with the district and meet the needs of students:

Partner with DESE to clarify the district's approach to autonomy: As recently as 2015, BPS' strategic plan identified strengthening school-based autonomy as a core priority for the district.¹⁷⁵ However, changing district-level leadership and central office turnover has created uncertainty and instability around the extent to which the district embraces and prioritizes autonomy. As a result, autonomies tend to be poorly defined and implemented differently across and within autonomous school types, creating confusion, overlap, and inefficiencies.

To ensure that the six remaining Horace Mann schools — as well as the district's Innovation and Pilot schools — have the support they need, district leadership must clarify its approach to autonomy and communicate that approach clearly and widely. In doing so, it must work closely with DESE to ensure that its approach is aligned with state law and policy regarding Horace Mann schools' autonomy.

Address known challenges related to overseeing and implementing multiple types of autonomous schools, in particular:

- **Equitable enrollment processes:** Enrolling in a Horace Mann school requires additional steps that are not required for BPS' district schools. First, families must seek out information about Horace Mann schools, as they aren't necessarily included on the BPS-generated list provided to families. Second, families wishing

to enroll their student in a Horace Mann school must fill out a separate application to place their child in that school's lottery.¹⁷⁶ This is an obvious barrier for families without the means or knowledge to navigate all of these systems. The district must streamline its enrollment process across *all* of its school types, including Horace Mann schools, to ensure equitable access for the city's students and families.

- **Opt-out processes:** The ability to opt out of centralized services is a core budgeting autonomy afforded to all types of autonomous schools.¹⁷⁷ However, as we heard from school and district leaders alike, the process is less than ideal. Timeline challenges often result in the district double-budgeting for these services, and the per-pupil amount that Horace Mann schools receive when they opt out is negligible. BPS leadership should review the existing opt-out process, making transparent the calculations behind the per-pupil amounts offered and ensuring that school budget timelines provide adequate time for schools to make decisions and for the district to adjust accordingly.

Create clear, equitable support for autonomous schools: Regardless of how highly BPS wants to prioritize school autonomy at this moment, the fact remains that there are six Horace Mann schools and dozens of other autonomous schools operating in the district that need to be supported. BPS must:

- **Establish a central office support team for Horace Mann and other autonomous schools:** When Innovation schools and HMIII schools began opening following the passage of the 2010 legislation, they were able to access support from BPS' Office of Strategic Planning.¹⁷⁸ However, this support was never fully codified in a formal office or in an individual's job description, and over time has largely faded as BPS has undergone substantial turnover in its central office.¹⁷⁹ To ensure strong implementation of autonomies across school types into the future, and to facilitate leader-to-leader support, collaboration, and learning, the district must designate a central office team dedicated to serving and supporting these schools. Doing so will provide additional aid to the schools themselves while creating a more streamlined system of support, information gathering, and resource-sharing at the central office. It would also allow the district to provide differentiated support to schools based on their individual needs.
- **Support school leaders' access to additional training and support:** The district should make available additional training and professional development unique to Horace Mann schools' specific sets of autonomies, in an effort to ensure the highest-quality schools for the district's students. This may include opportunities for shared interest and advocacy with other autonomous school types. It may also include training to develop core leadership skills necessary for leaders of autonomous schools, such as crafting a clear vision for the school, reallocating time and priorities, and building leadership capacity among teachers and staff.¹⁸⁰ Ongoing training and

coaching, access to tools and resources (e.g., calendaring support and work plans), and connections with other leaders are other key enablers of success. While BPS may not be well-positioned to design and offer these trainings, district leaders can help spot trends in school leader needs and hire external organizations to provide relevant training.

Both DESE and BPS must create a structure for Horace Mann and other autonomous school types to share learnings and best practices. As noted above, legislatively, the onus for disseminating best practices across schools is on both DESE and the school committee of the district in which a Horace Mann school is operating.¹⁸¹ Because no such system or structure currently exists, Horace Mann schools haven't engaged in the kind of best practice sharing originally envisioned. Moving forward, DESE and BPS must put in place systems or structures to facilitate learning across schools, to enable the sharing of best practices and lessons learned for the benefit of all school leaders, regardless of school type.

The recommendations outlined above are necessary to ensure that Boston's existing Horace Mann schools have the support and structures they need to provide a high-quality education to their students and to continue to be meaningful partners with the district.

A REVITALIZED VISION

However, there is a different future for the Horace Mann model, one in which current and new schools' full potential is realized and they become a core component of districts' improvement plans. This will require different politics and visionary leaders.

To see this alternate future become a reality, district leadership must fully embrace a clear vision for autonomy, including clarity about the role that Horace Mann schools and other autonomous school types will play in the district, and take the steps necessary to build systems that support that vision. In doing that, Horace Mann schools can be a tool that both enables districts to lead in innovation and helps them meet their own needs.

We see four potential paths for districts to take to effectively use Horace Mann schools in their own planning processes, none of which are mutually exclusive – a district could embrace multiple roles for these schools:

- 1 Horace Mann schools as a core component of a district's strategy to meet specific needs:** As districts undergo strategic planning processes and identify their needs, district leaders could launch a "call for schools" process for interested district staff or other local education professionals to open schools that meet the needs identified through the district's strategic planning process (e.g., schools serving

specific grade levels or neighborhoods or with a particular focus like STEM or arts). The district would need to design a rigorous application process for this call for schools, and selected leaders would then use the Horace Mann model to open new schools matching district needs. This approach places the district in the driver's seat, establishing a process for the district to determine its own needs and craft a system of schools accordingly.

- 2 Horace Mann schools as a career pathway for high-performing school leaders:** Districts could use the Horace Mann school model as a leadership pipeline and career pathway for its top-performing school leaders. To do this, the district would identify its most talented and highest-potential leaders (those who consistently see improved student growth and performance, who have successfully turned around struggling schools, or any other criteria the district wishes to use) and provide them with deep support to design and launch new Horace Mann schools. Leaders could have broad freedom to design a new school, or this could be used in conjunction with the strategic planning and call-for-schools approach described above.
- 3 Horace Mann schools as a mechanism for choice and student retention:** Public school enrollment in Massachusetts has been on the decline for the past several years. In 2015-16, nearly 915,000 students were enrolled in public schools across the state,¹⁸² compared with just over 885,000 in 2020-21.¹⁸³ Boston has lost more than 4,300 students – a decline of 8.5% – between fall 2019 and fall 2021.¹⁸⁴ As districts seek to attract and retain students, especially as the COVID-19 pandemic subsides, Horace Mann schools can play a role in offering more choices for families to encourage them to return to their local public school districts.
- 4 Horace Mann schools as a way to meet the needs of particular or high-need populations:** As discussed above, Horace Mann schools have long been successfully serving a particular niche or need within a district, such as providing alternative programming for students who are overage and under-credited¹⁸⁵ or those who are looking for programming in a particular career pathway.¹⁸⁶ Visionary leaders could use Horace Mann schools to meet the needs of unique student populations, establishing schools designed to meet the particular learning needs of specific groups of students.

The challenges facing Horace Mann schools can be addressed in ways that will enable school and district leaders to fully leverage the Horace Mann model. With a revitalized vision for the role that Horace Mann schools can play and the structures in place to support that vision over the long term, Horace Mann schools can help districts meet the needs of the students and families they serve.

The status quo isn't working, and districts must be willing to embrace alternative ways to better serve all of their students. Horace Mann schools can play a critical role in doing just that.

This may be especially true as districts across Massachusetts work to address substantial enrollment declines resulting from the pandemic. Enrollment in public schools dropped by nearly 40,000 students statewide between fall 2018 and spring 2021. The number of students being home-schooled more than doubled, from 7,600 to more than 17,000, during that same time.¹⁸⁷ Massachusetts school districts have a lot of work to do to bring students back.

Districts across the state also continue to struggle to meet the needs of high-need student groups, including those who are learning English, those who are economically disadvantaged, and those who have disabilities.¹⁸⁸ The status quo isn't working, and districts must be willing to embrace alternative ways to better serve all of their students. Horace Mann schools can play a critical role in doing just that.

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Bellwether Education Partners is a national nonprofit focused on dramatically changing education and life outcomes for underserved children. We do this by helping education organizations accelerate their impact and by working to improve policy and practice.

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