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11/12/2023

Policy Analysis in Education

How the Houston Independent School District Takeover Signals Political Warfare in The Lone Star State

Introduction

Over the last 30 years, US educational leaders have increasingly adopted state school district takeovers as a policy alternative for “failing” schools, notwithstanding their virtual ineffectiveness (Schuler and Bleiberg, 2022; Oluwole & Green III, 2009, Wong & Shen, 2001). Research shows that Black and Latinx students are more likely than any other race to experience a school takeover, and that these takeovers have historically led to lower test scores and mass teacher layoffs (Schuler and Bleiberg, 2022; Zalaznick, 2023). Given that school takeovers produce results that are less than or equal to the average among schools nationwide, and that Black and Latinx students, staff and families are most negatively affected, why are they still presented as a viable policy alternative for addressing struggling schools and districts? This paper argues that state school district takeovers are political power plays that governors use to stay in office, disenfranchise Black and Latinx voters, and legitimize their state education agencies. I examine the Houston Independent School District as the most recent high-profile example of a politically motivated state school district takeover, and will use various political analysis lenses to uncover how this policy case is about political control.

A Summary of the HISD Takeover

The story of HISD's takeover starts in 2015, when Texas lawmakers signed HB 1842 into law (Morel, 2023). Under the law, the Texas Education Agency (TEA) is obligated to either close the district or appoint a new board of managers if a school falls below state standards for five consecutive years (Morel, 2023). In 2019, The TEA opened an investigation into HISD after receiving multiple complaints about trustee behavior and the chronic underperformance of Phillis Wheatley High School (Carpenter, 2019). TEA Education Commissioner Mike Morath issued a letter notifying the district of the takeover attempt soon after the investigation, but a Texas judge blocked the attempt. After state legislators made "major updates" to the Texas Education Code to strengthen the legal basis for the takeover, TEA officially initiated the HISD takeover by appointing a new board of managers in 2023 (Lopez, 2023; Mendez, 2023, Nguyen, 2022).

In the next section, I outline the political analysis tools that I'll use to illustrate the configurations of power that made this policy come to fruition. In the section thereafter, I'll revisit the story of the policy and highlight its key political features using the political lenses.

Political Analysis Tools Used to Reveal Politically Motivated Nature of HISD Takeover

According to Malen & Knapp (1997), political perspectives expose the conflicts between policy actors and the configurations of power that "make policy." Instead of providing a rational solution to a problem or depending on an organization's standard operating procedures, political

perspectives reveal that actors' engagement in the political process drives policy decision-making. Keeping in mind that political lenses serve as conflict and power identifiers, I will further explain the HISD takeover using the tools that Malen & Knapp (1997, p. 428-430) offer for applying political perspectives:

1. Coalition-building is an integral action in political perspective
2. Policy develops through distinct phases
3. When viewed through the political lens, the outcome of policy is to retain institutional legitimacy and enhance institutional capacity to handle conflict

Revealing the Politically Motivated Nature of HISD Takeover

Coalition Building Through the Political Perspective

Applying the first of the three tools listed above reveals that policy actors formed coalitions to make the school takeover happen. Understanding the configuration of power between the members of these coalitions suggests that each policy actor acts independently and has different incentives for achieving the same outcome. For example, Governor Abbott appointed Commissioner Morath upon his election in 2015 (Texas Government, 2015). Morath is incentivized to work alongside Abbott to protect his position, which resembles a relationship emblematic of coalition building.

The Texas legislature, Morath and Abbott all operate within the same coalition, signaled by the signing of HB 1842 into law which made it possible for the state to pursue the takeover several years later. Utilizing the political lens reveals how both the interconnected actions and the timing of those actions made the policy happen. Abbott's gubernatorial election, Morath's

appointment, and the HB 1842 signing all took place within a 3-month period - anyone watching closely at the time could see a coalition forming (Texas Governor Election Results, 2022; Office of the Texas Governor, 2022; Morel, 2023).

It also reveals that the political process made it difficult for the opposing coalition - the former HISD school board - to resist the takeover. This coalition formed as a result of the diverse interests of the group: the school board wanting to maintain its power, the teachers and staff wanting to ensure their job security, and the students and families wanting more stability in their educational experiences, among other interests held by representatives and community members (Natanson & Meckler, 2023; Lopez, 2023). Their relative power in the policy-making process compared to the big three government actors was not enough to halt the policy.

Identifying Phases Through the Policy Perspective

The phases of the takeover's formulation and adoption are clear when viewed through the political lens. Examining the distinct phases of policy requires looking at how different policy actions "build up" to adoption and implementation. Phase 1 of the policy takes place in the Texas legislature where lawmakers signed HB 1842 (TEA, 2016). Phase 2 happens at the HISD district office, where TEA commissioner Mike Morath sent the school board their letter of notice that initiated the takeover. Phase 3 unfolds in the Texas supreme court where HISD sued Morath for "inaccurately interpreting state law and skipping procedural steps" (Lopez, 2023).

Morath launches Phase 4 after the supreme court rules in TEA's favor, allowing Morath to appoint new board managers to HISD after three years of legal battles (Lopez, 2023). Phase 5 is the last relevant phase, where the board carries out its first duties by hiring a new

superintendent and initiating a cascade of staff layoffs, among other administrative tasks (Zuvanich, 2023). Although I simplified the depiction of this policy case for the reader's clarity, its nonlinear, combative and power-oriented features are shown through the political lens.

Conflict and Legitimacy Through the Political Perspective

Lastly, the political lens uncovers how policy is used to control conflict over scarce resources and retain institutional legitimacy. Both Governor Abbott and Mike Morath are interested in retaining legitimacy in the eyes of their respective audiences. Taking over the largest school district in Texas would likely increase Governor Abbott's legitimacy in the eyes of many Right, some centrist, and a few Left voters. Abbott's State of the State Address made it clear that education holds a big space on his agenda: "we must reform curriculum, get students back to the basics of learning, and we must empower parents" (Abbott, 2023). Morath is interested in remaining legitimate in the eyes of Governor Abbott's administration, since Abbott appointed Morath. Morath can be replaced if he fails to deliver on Governor Abbott's education agenda items.

Political power is the primary scarce resource that's creating conflict in this policy case. Morel's (2023) work shows that school district takeovers often disenfranchises voters because state education agencies implement them by appointing a new school board. State-appointed boards make it more challenging for the constituency to hold board members accountable for serving/not serving their students. In the HISD takeover, Black and Latinx Houstonians lost their voting power, which they once used to affect education policy for the district. Republican voters within and outside of Houston gain political power by having their gubernatorial vote impact a

broader sector of the population's educational opportunities. Abbott also extends his reach to Houston's largely Democratic voter base through his agenda's implementation and through the news coverage on the takeover and its aftermath (Ramsey, 2016).

Conclusion

Where the political lens falls short is explaining the symbolic elements that policy actors used in the courtroom and in legislative documents to make the takeover happen. Horsford's perspective on how narratives of equity and accountability are tactfully delivered to initiate corporate reform efforts would be useful in this explanation (Horsford, 2013). Perhaps the symbolic lens or even critical policy analysis (CPA) would more accurately identify the role that imagery played in the takeover.

It's obvious that the outcomes of implementation will take time to crystalize - although we're already seeing libraries turned into discipline centers and flags turned into surveillance cameras soon after the new superintendent's appointment (Walsh, 2023). In the meantime, it's helpful to speculate how student performance data might be manipulated by the two coalitions I outline in the paper. If these outcomes end up being overwhelmingly positive, how do these coalitions morph to pursue their diverse interests? How, if at all, do they reset their interests if the takeover leads to increased scores *and* student, teacher, and parent satisfaction? If this analysis and the existing literature on takeovers is a preview of what's to come in the future, The TEA and the people of Houston are headed into a political war that's just beginning.

Sources

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