A POLICY HISTORY OF STANDARDS-BASED EDUCATION IN AMERICA

A DISSERTATION SUBMITTED TO THE GRADUATE DIVISION OF THE
UNIVERSITY OF HAWAI'I AT MĀNOA IN PARTIAL FULFILLMENT OF THE
REQUIREMENTS FOR THE DEGREE OF

DOCTOR OF PHILOSOPHY

IN

EDUCATION

AUGUST 2011

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Keywords: Standards-based education, education policy, politics of education, history of
education

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ABSTRACT

This dissertation will attempt to answer three primary research questions: 1) Why did policy makers and other interest groups come to embrace standards-based education as the key to recent educational reform efforts? 2) How did standards-based education come to be embedded in the curriculum, assessment, and accountability systems throughout the nation? 3) What has its lasting impact been, not only in education policy, but also on the broader society as a whole? In this dissertation, I will argue that the corporate elite and global competitiveness ideology have been the primary empirical and ideological drivers behind this reform model for decades. After two chapters spent defining these key terms, I will offer a number of historical chapters. The first will examine a decade of reports in the 1980s that provided much of the rhetoric and institutional linkages that led to standards-based education. Then, I will examine the federal political and legal battles that eventually led to the enshrinement of standards-based education in federal law. After a brief aside to look at Hawai‘i as a case study of these forces in microcosm at the state level, I will arrive at my conclusion. This will examine the national evaluation literature critical of the model, recent moves towards national standards, and the broader implications of standards-based education for society as a whole.

CHAPTER 1. INTRODUCTION

I would contend that the three main stages of the American economy have created three main different types of educational policy: 1) common schools of the agrarian period (from the colonial period to the late 19th century), 2) compulsory mass schooling and the rise of graduate schools of education during industrialization (from the late 19th century to the late 20th century), and 3) the family of reform models first called “systematic reform” and “school restructuring” in the 1980s and later consolidated under the broad rubric of “accountability” during the post-industrial phase over the last few decades (Emery, 2002).

Standards-based education is a central part of this complex of closely related reform ideas generally referred to as accountability. Building on Apple (2006) these include 1) raising the standards (first in the everyday sense of the term, later as explicit written guidelines in each subject matter and grade or grade spans), 2) testing frequently, and 3) raising the stakes for students, teachers, principals, and schools based largely on those test results.

Since the seminal 1983 *A Nation at Risk* study marked the beginning of a major shift in the values debate in educational policy away from equity and equality towards efficiency and excellence, numerous educational reform concepts have come and gone. In this dissertation, I hope to demonstrate that the one which may have had the biggest impact over the longest period since then has been standards-based education. It is also the only reform idea that has survived over the last several decades to become an integral part of local, state, and federal education today.

I hope to answer three primary research questions: 1) Why did policy makers and other interest groups come to embrace standards-based education as the key to recent educational reform efforts? 2) How did standards-based education come to be embedded in the curriculum, assessment, and accountability systems throughout the nation? 3) What has its lasting impact been, not only in education policy, but also on broader society as a whole?

Many heterogeneous individuals, factions, organizations, governmental agencies, and businesses have contributed to the pervasive presence of standards-based education in American K-12 education today. Apple named the abstract Weberian ideal types of neoliberals, neoconservatives, evangelical Christians, and the professional managerial class as the primary progenitors (2006). Berliner and Biddle tapped the far right, religious right, and neoconservatives

(1996). These camps (and a few other important ones, like teacher organizations and teacher training accreditation agencies) have certainly been influential in the propagation and consolidation of this concept, even when the goals and self-interests of their factions and organizations have occasionally been in conflict. These are the people Cuban calls the “policy elites.” They are

a loose network of corporate leaders, public officials, foundation officers, and academics who use both public and private funds to run projects and circulate ideas consistent with their versions of school reforms. They have ready access to the media and the capacity to set a public agenda for discussion. Political party labels do not define them, although there are clearly Republicans and Democratic members who carry their affiliation on their sleeves... These overlapping networks of like-minded individuals share values and tastes. They convene frequently in various forums, speak the same policy talk, and are connected closely to sources of influence in governments, media, businesses, academia, and foundations. They help create a climate of opinion that hovers around no more than a few hundred influentials in policymaking (Cuban, 2004, p. 207).

I hope to explore the notion that, among these many change agents, business may have been the most influential one. They were the most effective in making themselves heard, framing the agenda, sponsoring influential reports, organizing key events, supporting specific pieces of legislation, and generally maintaining the most vigorous, systematic and sustained policy engagement over several decades.

Ultimately, the greatest impact of business on standards-based education, however, is not merely to be found in a resurgence of human capital theory or the consolidation of the ideology of global competitiveness as a leading outcome desired from American K-12 education. Rather, business’ greatest impact may lie in what is not spoken, in what is taken for granted: the desirability of continuing the global economy as it is, in spite of the fact that it may be unsustainable and could be leading us to a wide variety of significant problems in the near-to-medium term future, a question I will address at greater length in the conclusion.

Chapter two will review the most salient literature on the topic, outline my proposed methodology, and demonstrate how I intend to split the differences between those narrative histories of federal educational politics that have little overarching theoretical frameworks and

those theoretical-historical works that have so decomposed the major sets of change agents that they offer little empirical historicity. Chapter three will try to define what I mean by “business,” the “power elite,” and other key related terms, as a prerequisite to understanding their influential role in the development of this reform idea. Since global competitiveness ideology is such an influential ideological driver of standards-based education, chapter four will attempt to define what has been called “the most abused word of the 20th century” (Chandra, 2002, para. 2), one of the most slippery of terms in recent research in the humanities and social sciences, “globalization.” It will also compare and contrast this term with similar ideas like neoliberalism, the “Washington consensus/Washington rules,” and “Bretton Woods II” to describe international macroeconomics after the Nixon Shock of 1971.

Chapter five seeks to understand how the corporate elite began colluding with the movement conservatives in the 1970s. Chapter six aspires to be the history of a kind of a “dog pile,” with many different elite factions contending, generating reports, and holding influential meetings during the 1980s and 1990s, one that encompassed Democrats as well, making this education reform idea a bipartisan consensus.

After everyone emerged from the dog pile, however, the business-conservative (and nascent “New Democrats”) coalition was left still holding the ball. Their reports and representatives gained traction. Their crisis rhetoric, workforce development, and school-to-work policies proved dominant. They became instrumental in how standards-based education became conceptualized in the public policy arena.

The National Governors Association and Business Roundtable each dedicated an annual meeting exclusively to education during the 1980s. This helped consolidate the dominance of a new business-conservatives-presidency-governors-teacher union leadership-new Democrats bloc, decisively displayed at the 1989 Charlottesville National Education Summit with President Bush. This newly emerging bloc was powerful enough to steamroll an attempted preemptive strike by Senate Majority Leader George Mitchell and House Majority Leader Richard Gephardt, who held a press conference right before the summit.

State efforts in California and Minnesota (Berman and Clugston, 1988), city efforts like the Boston Compact, and corporate initiatives like R.J.R. Nabisco’s “Next Century Schools” (spearheaded by Lou Gerstner, who would continue to be influential in standards-based education when he became head of IBM shortly thereafter) became models of government-

business collaboration. They were the entering spear-point of the ascendant business-conservatives-presidency-governors-teacher union leadership bloc. This bloc, though powerful and rising fast, still wasn't dominant. Even with their help, the signature education reform legislation of President Bush and former governor then Education Secretary Lamar Alexander, *America 2000* (of which standards were a big part), failed to pass a Democratic Congress.

In chapter seven, the elites really went at it. The coalitions they led often broke up and reconfigured. The "grassroots" started speaking up for themselves, both "left" and "right." Congressional Democrats, especially ones from urban districts, fought a strenuous battle for equity and resources but it was a rear guard one. They were gradually losing control over the policy agenda they held since the mid-1960s.

The social conservatives also started shearing off in significant numbers from their partners in "business." The social conservative grassroots and their leaders (or some might say manipulators) among the self-proclaimed "Republican revolution" conservatives of 1996 were often more interested in school choice, vouchers, culture war issues, and conservative social values than in educational standards, workforce development and "global economic competitiveness" issues. This schism turned into the "standards wars" of the mid 1990s.

By the mid-1990s, it seemed that parents, rank-and-file conservatives, rank-and-file teachers, "Republican revolution" conservatives from the 1994 elections, urban Congressional Democrats - everybody - had a bone to pick with these new standards, albeit often for different reasons. The policy elites were having a hard time keeping those they professed to lead on point.

Urban Congressional Democrats failed to capitalize on these internecine battles. Many of those among the Fortune 500 CEOs did capitalize on them. These were people like IBM's Lou Gertsner, Xerox's David Kearns, and several others. These captains of industry began taking a far more activist, hands-on approach, serving in government and working outside of it, convening national education summits, publishing books, writing influential op-ed pieces, and being profiled in leading magazines, particularly of the business press. As Harvey's noted account of the rise of neoliberalism put it, these CEOs and other "key operators on corporate boards" and their technocratic associates, themselves "leaders in the financial, legal, and technical apparatuses surrounding this inner sanctum of capitalist activity" have become an undeniable "rising class power under neoliberalism," as I discuss in greater detail in chapter four.

(2007, p. 33). Elsewhere, Harvey provided one of the better definitions of neoliberalism when he wrote that:

The capitalist world stumbled towards neoliberalization as the answer through a series of gyrations and chaotic experiences that really only converged as a new orthodoxy with the articulation of what became known as the ‘Washington Consensus’ in the 1990s. By then, both Clinton and Blair could easily have reversed Nixon’s earlier statement (“We are all liberals now”) and simply said ‘We are all neoliberals now.’ The uneven geographical development of neoliberalism, its frequently partial and lop-sided application from one state and social formation to another, testifies to the tentativeness of neoliberal solutions and the complex ways in which political forces, historical traditions, and the complex ways in which political forces, historical traditions, and existing institutional arrangements all shaped why and how the process of neoliberalization actually occurred (Harvey, 2007, p. 13).

President Clinton and most of the governors of both parties, in the first blush of the prominence of the Clinton/Al From/corporatist/Democratic Leadership Council/“New Democrats,” went right along with them. Obama is only the latest in a long line of Democratic capitulation to corporate interests over that party’s traditional support for organized labor.

Amidst this turmoil, the new business-conservatives-presidency-governors-teacher union leadership-Congressional New Democrats bloc managed to pass both *Goals 2000: Educate America Act* (almost a copy of Bush’s America 2000) and the *Improving America’s Schools Act* (the Elementary and Secondary Education Act reauthorization) in 1994. Now standards were an integral part of federal policy as well as of local and state educational policy, as these jurisdictions chased the slowing increasing share of federal financing of K-12 education. “In 1990–1991, the federal share of total K–12 spending in the United States was just 5.7 percent. By 2005, it had risen to 8.3 percent” (United States Department of Education, 2005, p. 2). *No Child Left Behind* put it all in cement, with full bipartisan support. In fact, without key Democrats like Kennedy in the Senate and Miller in the House, the measure probably wouldn’t have passed at all.

Chapter eight is a microcosm of all of these developments, a case study of similar forces contending in all of their heterogeneity and conflict-cooperation in one state, Hawai‘i. The story of Hawai‘i’s adoption of standards-based education will be a little different than that of other

states, as Hawai'i is the only state in the union with a single statewide education district. Long-standing dominance of state governance by the Democratic party will also contribute another unique set of circumstances. Finally, the conclusion, chapter nine, will consider the potential future of standards-based education, as well as the broader implications of education in society in the near- to medium-term future.

CHAPTER 2. LITERATURE REVIEW AND METHODOLOGY

In this chapter, I hope to offer an abbreviated literature review that focuses on the four works in the education policy literature most relevant to my dissertation: Apple (2006), Berliner and Biddle (1996), Jennings (1998), and Kosar (2005). The former two are too abstract and lack intricate historical explanation. The latter two are too exclusively historical and seem to lack a theoretical framework.

Apple tries to “map the right” by focusing on “the power relations that impose their interpretations” on key words like “markets, standards, God, and inequality” (2006, p. 8). This is an ambitious project. Perhaps because of its scope, he does not restrict his focus to standards-based education but considers the broader educational policy implications of the general rightward turn in America over the course of recent decades. In considering this period, he prefers to decompose the leading factions responsible for these changes and look at them non-longitudinally, instead of considering them in all of their dense empirical historicity. Berliner and Biddle share a similar emphasis. To my mind, both works fail to see the bipartisan nature of many of the social tendencies they examine. They are too prone to blame “the right” as the primary agent of these changes, when so many of the changes were driven by business, which is essentially bipartisan. Instead of looking at things from “left/right,” a more empirically robust analysis might give more attention to “top/bottom.”

In Apple, the factions are 1) neoliberals, 2) neoconservatives, 3) “authoritarian populists-religious fundamentalists/conservative evangelicals,” and 4) the “managerial and professional new middle class” (2006, p. 9). Few would deny the cardinal importance of these groups in the ongoing battle for control over the American educational systems and their policy agendas.

Apple considers neoliberalism as the “defining political/economic paradigm” of our age, or, as McChesney calls it, “capitalism with the gloves off” (cited in Apple 2006, p. 7). This makes “neoliberalism” a code word for “big business” or “global capitalism” after the fall of the Soviet bloc. In that, we are not far apart.

A powerful assumption that Apple and many others make of neoliberals is that they desire a weak state (2006, pp. 19, 39). While neoliberals may profess a desire for such, or prognosticate its coming, a strong state is what they actually seek to create and use, as I will argue at greater length in part four of my conclusion.

In contrast, a faction that Apple thinks desire a strong state is neoconservatives. “Neoconservative” is one of those loaded terms that means many different things to different people. Apple uses it to mean those who would seek to use the state to facilitate a “return to traditional values and morality” (2006, p. 39). This faction is often associated with the counterrevolution to multiculturalism led by such people as William Bennett (1994), Alan Bloom (1988), and E.D. Hirsch (1988), people who long for a return to the canon of “dead pale males.” While the strong state is certainly an important part of neoconservative ideology in this picture of a return to prelapsarian virtue, it also overlaps with many of the goals of what Apple calls “authoritarian populists” as well.

I have a different take. While I agree with Apple that neoconservatives seek to regain certain aspects of the past, they are perhaps not the ones he suggests. Instead of recapturing an illusory past centered around “virtue,” I would contend they are more attracted to notions of unilateral American might on the world stage. Absent a circumscribing communist threat, this is the hypostasis of an American exceptionalism that began with John Winthrop’s 1630 sermon *A Model of Christian Charity* delivered on the Puritan’s ship *Arabella* en route to the “new world.”

The most paradigmatic recent expression of the neoconservative creed is the *Project for a New American Century* manifesto (2000). It should be noted, however, that key Democrat strategists shared many of these ideas (Brzezinski, 1998, 2007). They apply to Obama every bit as much as to Bush and their minions and camp followers. What many liberal analysts fail to realize is that the neoconservative faction seeks to use state power with the same breadth and ferocity as the Jacobins during the French Revolution. This is a far cry from the traditional conservative mandate for limited government indeed.

Another faction examined by Apple is the “managerial and professional new middle class” (Apple, 2006, p. 48). These are the people investigative journalist Russ Baker has called “the army of enablers” of the “shadow government” (Edmonds and Collins, 2009, 37:20, 28:00), the technocrats who make the vast economic, legal, and geopolitical systems of the globe possible, a new class that has in some ways confounded Marxist orthodoxy. Globally, this class could perhaps be most closely associated with the attendees of the annual Davos World Economic Forum in Switzerland. They are the “salaried mental workers who do not own the means of production and whose major function in the social division of labor (is) the reproduction of capitalist culture and capitalist class relations” (Ehrenreich and Ehrenreich,

1979, p. 11). In educational policy, they manage the educational systems and administer the ever more important high-stakes tests on behalf of the “audit culture,” in the name of “efficiency, management, testing, and accountability” (Apple, 2006, p. 48)

These camps have had an undeniable importance in determining the historical trajectory and possible futures of educational policy. Apple subsumes them all under the general rubric of the “right,” implying that mobilization by progressives for greater political balance is the solution, when much of what he describes is actually bipartisan. Another important methodological consideration, however, is the non-longitudinal nature of his analysis. While his dissection of these camps as abstract social forces is excellent, I doubt we will be able to understand the role these groups have played in history without a more nuanced empirical understanding. Understanding the past more concretely, we will also be better able to shape the future as well.

Berliner and Biddle (1996) perform a similarly non-longitudinal analysis, although identifying fewer change agents, dwelling on them more briefly, and considering them over a shorter timeframe than Apple. They see neoconservatives, far right, and religious right as the main culprits. According to Berliner and Biddle, if one examines the actual achievement data instead of the emotionally overwrought and often politically-motivated rhetoric, then the incessant and alarmist allegations of crisis in American education in the 1980s and 1990s can be considered overblown - or even “manufactured.”

In contrast to the high level of abstraction achieved by these two volumes, two narrative histories of the federal politics of standards-based education during the Bush Senior and Clinton years offer a denser historical understanding (Jennings, 1998; Kosar, 2005). John Jennings was an influential staffer on Congressional education committees from 1967 to 1994, ending his career as General Counsel for the Committee on Education and Labor. Kevin Kosar has been a researcher with the Congressional Research Service of the Library of Congress since 2003. Both bring an insiders’ passion for the arcane minutiae of policy-making but offer little to help understand why things happened the way they did except in the narrow political sense. They might perhaps be accused of losing sight of the big picture.

While Apple and Berliner and Biddle have a firm grasp of the big picture, they fail to illuminate the quasi-journalistic questions of “who, what, why, where, and when.” Jennings and Kosar immediately bring to mind Bismarck’s old adage that “those who like laws and sausages

should not see either being made.” In their compelling descriptions of this process, however, they offer little more than descriptive narratives.

In order to illuminate my anarchist perspective by contrasting it with an archetypically liberal one, I would like to analyze an anecdote Apple told in the revised edition of *Educating the Right Way* (2006) about his participation in an international conference in Cuba. At the lectern, he distanced himself “from a number of the international economic and cultural policies advocated by the United States,” and went on to discuss “neoliberal education reforms” and “neoconservative policies” including “the push for ever-increasing national standards” (Apple, 2006, pp. ix-x).

After his talk, a “visibly agitated” Florida school official confronted him and called him “a creep and a disgrace to the American flag” (Apple, 2006, pp. ix-x). Apple took umbrage at this insult and meditated on its larger meaning. To him, the

attack says something about the ways in which some “Americans” equate a lack of substantive criticism as patriotic and define critical sensibilities in general as outside the boundaries of legitimate expression. Yet in my mind, when a nation and its government and major institutions do not deliver on their promises and on the sets of values they officially profess in education and elsewhere, when they even go so far as to condone torture and subvert international ethical standards, then substantive criticism is the ultimate act of patriotism. Such criticism says that “We are not just passing through. This is our country and our institutions as well, built by the labor of millions of people such as ourselves. We take the values in our founding documents seriously and demand that you do so too” (Apple, 2006, p. x).

Even considering the heterogeneity of anarchist thought and praxis, the moral of this story would be an anathema to any anarchist. It assumes the legitimacy of a nation-state one should be patriotic towards. An anarchist does not recognize the moral and political legitimacy of any form of governance beyond the smallest possible level. These might include workplaces, watersheds, bioregions, and county-sized areas. To further clarify the geographic scale I am referring to, Catalonia during the Spanish Civil War is typically referred to as the largest and most successful anarchist commune to date.

In Apple’s story, we also hear a resounding defense of free speech and freedom of conscience. Here the liberals and anarchists are in close accord, albeit as a means for different

ends. For liberals, free speech is an indispensable element in developing the consensus or majority opinion needed to make public policy. For anarchists, free speech is an indispensable element in helping the individual to resist coercion and “received ideas” (Flaubert, 1976). Anarchists also part ways with liberals over the latter’s faith in the ultimately self-correcting nature of a bustling information sphere, the vast society of the spectacle (Debord, 1994; Edelmann, 1988) and elective politics within the context of the nation-state. Anarchists do not share the confidence of liberals “that the best test of truth is the power of the thought to get itself accepted in the competition of the market,” as Oliver Wendell Holmes wrote in his dissent to *Abrams v. United States* (1919).

The genealogy of this staple of liberal thought can be traced back as far as the *Areopagitica*, Milton’s classic defense of free speech published in the midst of the English Civil War. In it, he urged truth and falsehood to “grapple; who ever knew truth put to the worse in a free and open encounter” (Milton, 1644, para. 7)

According to liberal dogma, a vigorous information sphere operating according to this process will slowly but surely guide the behavior of the state in ways generally acceptable to most and generally conducive to social betterment. In contrast, anarchists see the information sphere as something often manipulated by the power elite to support their own goals and objectives. As standards-based education took hold in American K-12 education, American schools themselves became part of this information sphere. From this vantage point they subtly (and often not so subtly) shaped, massaged, discursively created, lambasted, valued, organized, and evaluated K-12 public education in ways conducive to long-term interests of the power elite.

Anarchists and liberals also diverge in their conceptions of the role of the nation-state and the nature of the alleged social compact between it and the “citizen.” A liberal might expect a nation, government, and its major institutions to “deliver on their promises” (Apple, 2006, p. x). Conversely, an anarchist would contend that nations, their governments, and their major institutions exist specifically to *not* deliver on their promises. Or, at best, to deliver on as few of them as is necessary to stave off social revolution. For example, when a liberal sees a homeless person, s/he thinks the system is not working. When an anarchist sees a homeless person, s/he thinks the system is working exactly the way it is supposed to.

Anarchists do not see the nation-state as a mechanism to achieve peace, prosperity, collective defense, social welfare, and all of the other oft-touted social goods of classical liberal

theory. Rather, they see nation-states as designed and operated to ensure these things do not happen, so that the government can perform its real function: transferring the wealth of the working and middle classes to the super rich and facilitating ever-increasing command and control from the top to enable this to take place.

Liberals and anarchists both share a keen appreciation of collective action and communal solidarity, although anarchists remain leery when this occurs in large-scale polities. In a sentiment attributed to Balzac, “behind every great fortune is a great crime” (O’Connner, 1971, p. 47). An anarchist might paraphrase that to read “behind every great country is a great crime.” This is especially true in the case of the United States.

In relating this anecdote, Apple made an impassioned plea for civic engagement as a kind of reciprocal duty we owe the past and the labor that has gone into our common institutions. “This is our country and our institutions as well, built by the labor of millions of people such as ourselves” (Apple, 2006, p. x). Few would deny abolitionists, suffragettes, organized labor, the civil rights movement, and others have all achieved great things through determined, systematic, and collective action. The anarchist would note, however, that these camps served as pressure groups which managed to win concessions from the political system but rarely took lasting formal power. The anarchist would also be dubious of a celebratory notion of American history that didn’t qualify it by recognizing that the country was stolen from the indigenous people, made possible by their genocide, and built on the blood, sweat, and tears of slaves.

In this anecdote, Apple further mused in defense of free speech against reactionary assaults. Liberals “take the values in our founding documents seriously and demand that you do so too” (Apple, 2006, p. x). Anarchists take founding documents like the Declaration of Independence very seriously. Unfortunately, this particular document is not a part of the law. An anarchist would argue that the Constitution and Bill of Rights, on the other hand, were designed to preserve the prerogatives of the ascendant colonial W.A.S.P. bourgeoisie, replacing one set of rulers for another, and centralizing power away from the states to the federal government in the process. Many point to President Washington’s military suppression of the Shea Rebellion in Massachusetts as the Constitution was being written as proof that American government was never really intended to be “of, by, and for the people.”

Most anarchists would also contend that the laudable “values of our founding documents” haven’t been lived up to nearly as often as liberals might like to think. In fact, it could be argued

that they exist to perpetuate the illusion of democracy so as better to enable ongoing rapine and repression by the elite.

This trend was amplified when America became an active overseas imperial power after the Spanish-American War in 1898 (Butler, 1933). It intensified still further with the rise of the national security state after World War II, creating a “friendly fascist” police state at home (Gross, 1980) and perpetual war abroad (Vidal, 2002; Blum, 2008) and an economy dependent upon both.

With President Obama’s codification of many of the worst excesses of the Bush administration, we are witnessing the culmination of a long-standing, bipartisan assault on the “values of our founding documents,” which has reduced them to dead letters.

Berliner and Biddle (1996) are passionate defenders of public education who wrote a worthy rebuttal to more than a decade of fear mongering. Nevertheless, after *Pierce v. Society of Sisters* (1925), public education is still mass compulsory schooling and still presupposes the police power of the state.

Insofar as the majority of future workers will likely find little intrinsic rewards in the jobs they will come to perform in the workplace, the relative meaninglessness of school provides a perfect "boot camp" for teaching them to accept alienation as an inevitable part of life. Submitting to the demands of school for the sake of grades and test scores, they receive a solid “basic training” for accepting the meaninglessness of work for the sake of a paycheck (Gabbard, 2003, pp. 72-73).

Many influences contributed to the consolidation of neoliberal economics in America. Most important was the committed bipartisan counterrevolution against the civil rights movement, 1960s counterculture, and equity regime in federal educational policy. Important components in this larger process included the consolidation of corporate ownership of mass media and the concomitant narrowing of view points, the election of Reagan and corporatist Democratic Leadership Council New Democrats, the widespread application of Friedmanite economics worldwide, specific pieces of legislation (like NAFTA, the repeal of the Glass-Steagall Act, Clinton’s “welfare reform,” and others), the capture of regulatory agencies by the industries they were supposed to regulate, and the powerful influence of corporate money in political campaigns, just to name a few.

Education was only a small part of this matrix, albeit an important one, especially relative to its size. Likewise, standards-based education was only one of the major education reform ideas in circulation over the last few decades, albeit one of the most important ones. Certainly, global competitiveness ideology was a crucial ideological driver for standards-based education, and neoliberal economics and the cardinal importance of wage labor within it were central to this ideology. Furthermore, the importance of wage labor, portrayed in many of the reports and other documents that helped provide the supporting rhetoric for this reform concept, and also helped intensify long-standing notions of economic individualism, further facilitating the demise of the social welfare policies of the Great Society and New Deal.

Standards-based education has given teachers and administrators more and more control over less and less to decide. This notion of expertise-driven, quantifiable goals, flattening hierarchies at the middle and lower levels of management, and then holding those middle and lower levels “accountable” by means of high stakes testing is as much a hallmark of the showcase companies of the neoliberal “new economy” as it is of standards-based education. This general attitude towards management may have had a more lasting impact on society than specific trends in business management techniques that educational systems experimented with as standards-based education came to dominate American educational policy, such as performance-based contracting, zero based budgeting, management by objectives, program planning based budgeting, and total quality management.

In 2009, nearly 80 million (U.S. Department of Education, year, para. 1) of America’s approximately 300 million people were either enrolled or teaching in schools and colleges. Assuredly, many of these schools and colleges were not utilizing standards-based education. Many of them were, however, especially public schools in the states which took federal money for K-12 education – which is to say all of them. Furthermore, many of the salient features of standard-based education have been creeping steadily into the academy as well, often through accreditation review procedures.

Perhaps the primary contribution of standards-based education has been its singular contribution to the consolidation of neoliberal economics in America. This has facilitated the ongoing movement of the corporation to the center of American life, socialized job training (and other) costs, rationalized the decimation of social welfare policies, and conditioned the better

part of 80 million people per year to a general style of management highly conducive to the operation and objectives of neoliberal economics.

I would like to present the central argument of my study as a narrative history informed by a critical political sociology, one that focuses on the specific empirical efforts of key individual corporate leaders, national business organizations, and policy entrepreneurs in their service who moved fluidly between the academy, government, and foundations. Considered collectively, this camp have actively, consciously and effectively participated in the establishment and consolidation of standards-based education in America over the last three decades.

This study has the potential to occupy a unique niche in the literature of education policy and education history. While there is a literature on the historical influence of business in education (Block, 2005; Boutwell, 1997; Boyles, 2005; Bowles and Gintis, 1976; Cuban, 2004; Gatto, 2003; Gelberg 1997; Kohn and Patrick, 2002) there is no single volume (that I've found) looking in detail at the influence of business on a single reform idea over time. Furthermore, while there is a substantial literature on various facets of standards-based education, I have yet to find a single overarching policy history of it for America as a whole, or a single state as a case study, with the possible exception of Hamilton et al (2007) as a national overview and Horn and Kincheloe (2001) as a state overview (of Texas). In addition, while there is a growing literature on education in the context of globalization and neoliberalism (Carnoy, 2000; Segall, 2006; Spring, 1998), I still have yet to find any single volume relating the long-term evolution of a specific educational policy reform concept empirically, theoretically and dialectically to the complex economic, political and cultural formations described by these two complex terms.

My methodology and theoretical framework is qualitative, interpretive, post-positivist, and historical materialist. It is most like those dialectically sophisticated narrative histories that occupy such canonical roles in the literature of education history (Tyack and Cuban, 1995), critical theory (Horkheimer and Adorno, 1976), and cultural studies (Thompson, 1999) These perspectives will allow me to highlight the dialectical interaction between the Durkheimian "social facts" of a richly detailed empirical historical narrative and the interdisciplinary sociologically-based theoretical considerations that may arise from it (Durkheim, 1973, pp. 16-17). This framework also shares much in common with a historicized "political sociology of education," an "interdisciplinary hybrid" that "aims to study power and relations of authority in

education, and the political underpinnings and implications of educational policies” (Torres, 1999, p. 94) and “to understand contemporary educational reform as a social and political practice,” one that can account for “historically formed patterns of knowledge (epistemology), power, and institutions” (Popkewitz, 1991, p. 13). Likewise, in schooling, Chomsky sees “subtler and cruder methods of control” (2003). Similarly, Apple envisions a critical “sociology of education that is broad and that cuts across disciplinary borders - including important work in education in curriculum studies, history, gender studies, cultural studies, postcolonial studies, critical race theory, and so on” (Apple, 1996, p. 125). While my approach will not be quite so broad as Apple’s, certainly history, cultural studies, political science, and critical theory will be vital.

A typical approach to education policy planning, implementation and evaluation, guided by instrumental rationality and expertise-driven “solutions,” has lost a significant amount of currency in the education policy literature over recent decades (Weaver-Hightower, 2008, p. 153). Current approaches show a greater sensitivity to complexity in the policy-making process, as exemplified by the rise of “ecology” as a major new metaphor in educational policy analysis (Weaver-Hightower, 2008, p. 156). While some may feel that earlier incarnations of this metaphor suffered from the tacit levity of “an ecology of games,” or used “ecology” superficially to simply mean “the policy environment,” current notions of the metaphor are far more nuanced. They include considerations of “actors, relationships, environments, structures, and processes” (Weaver-Hightower, 2008, p. 155-156).

What most work in these theoretical frameworks has in common, however, is a taking of the nation-state (and its political subdivisions) for granted, as the ultimate arbiters and implementers of educational policy. This can make it difficult for some analysts to come to grips with the problems inherent in the state’s impact on human lives. Here, canonical and contemporary anarchist thinkers and school administrators will be of assistance in building my intellectual infrastructure (Goodman, 1960, 1962; Woodcock, 1977; Perlin, 1979; Ehrlich, 1996a; Suissa, 2006; Amster, DeLeon, Fernandez, Nocella and Shannon, 2009). As Clark observes:

The anarchist program is both a strategy for human liberation and a plan for avoiding global economic catastrophe. It appears to be the only political practice which offers a

viable synthesis between the values of human self-development and liberation, and those of ecological balance and global survival (Clark, 1996, p. 101).

In this chapter, I offered an abbreviated literature review that focused on the four works in the education policy literature most relevant to my proposed dissertation and tried to explain how I sought to balance theory and dense historical understanding, all within an overall anarchist methodological framework.

CHAPTER 3. THE KEY PLAYERS DEFINED

In this chapter, I will attempt to define specifically what I mean by such terms as “business,” “big business,” “corporate leaders,” the “power elite,” the “powers that be,” the “super class,” and the “military-industrial complex.” It is necessary to define these terms clearly because I will argue in the historical chapters (five through eight) that that they have been among the most important empirical drivers of the introduction, consolidation, and implementation of standards-based education in American over the last several decades. As we compare and contrast these terms over the course of this chapter, such a discussion will be useful in establishing a context to help us understand broad classes of significant change agents. As I delve more deeply into concrete historical exposition, however, my focus will shift to naming particular individuals and business membership organizations and examining the specific roles each played at various stages along the way.

For starters, I see “business,” “big business,” or “corporate leaders” as the most useful of these many terms. Yet I do not see “business,” “big business,” or “corporate leaders” as abstractions, Weberian ideal types, or a homogenous, unitary force. Rather, I consider them empirically, as people and companies that can be named (Domhoff, 2009; Dye, 2002; Zweigenhaft and Domhoff, 2006).

I see their archetypal American expression in those entities listed on such august indexes of corporate prominence as the Fortune 500, Standard and Poor’s 500, and Dow Jones Industrial Average. These are often informally referred to as “blue chip” companies. Some business organizations, like the Business Roundtable, explicitly limit their membership to Fortune 500 Chief Executive Officers, adding further validity to these categories as benchmarks of the American corporate elite. American corporate leaders invited to such influential international confabs as the Davos World Economic Forum in Switzerland, the Bilderberg Group, and the Trilateral Commission reside at the Olympian heights of this hierarchy.

There are other terms and phrases one could use more or less interchangeably with “business,” “big business,” and “corporate leaders,” some of which may crop up from time to time in this study. By far the most important of these is the unavoidable phrase, the “power elite,” first developed by Mills in his classic book of the same name (1956). He too did not see this elite as unitary.

It is not my thesis that for all epochs of human history and for all nations, a creative minority, a ruling class, an omnipotent elite, shape all historic events...The minimum definition of the power elite as those who decide what is decided of major consequence does not imply that those who are members of this elite are always necessarily the history makers; neither does it imply that they never are. We must not confuse the conception of the elite, which we wish to define: that they are the history-makers of our time (Mills, 1956, p. 20).

This definition highlights the conflicts among the various elite factions as much as it does the community of interests that emerges from them typically having similar backgrounds and institutional positions. Or, to put it in Orwellian terms, their “groupthink.”

Another valuable phrase is “the powers that be,” commonly expressed as an acronym much beloved by the blogosphere, “TPTB.” This was also the title of a book of the same name by David Halberstam first published in 1979 on the rise of the mass media as a potent political actor (Halberstam, 2000). While few would deny that the mass media are politically influential today, many would add different socio-economic categories and names as well. Also, the “powers that be” as it is used today implies a class even richer and more powerful than the media. I would argue, however, that standards-based education is not carried out by these super elite and powers that be so much as by their functionaries, by the professional-managerial class of technocrats described by Apple (2006) and others.

Rothkopf’s recent foray into this area of economic analysis came up with the international “superclass” (Rothkopf, 2009). Since Rothkopf is a former director of the high-powered consulting firm Kissinger Associates, one might not be surprised to discover that his account is largely a paean to this class, one he must surely be considered a member of. He also explicitly conflates the roughly 6,000 people who manage the world (as he counts them) with the attendees of the Davos World Economic Forum. This indicates it is trans- or supra-national class, one that has more in common with its fellow members than those of the working class in their own countries, an elite technocrat model.

I will also be using the familiar “military-industrial complex” phrase from Eisenhower’s famous 1960 farewell address, as well as common modern variations on it, like the “military-industrial-intelligence complex” (Priest and Arkin, 2010) or the “military-industrial-academic

complex” (Giroux, 2007) The decline of America’s manufacturing base complicates this usage, however. There is little “industry” left in America, except perhaps for weapons, cars, and planes.

Eisenhower’s speech is probably so well known because it has proven so chillingly prescient. What is less well known is that Eisenhower’s original draft indicted the “military-industrial-academic complex,” but that he left the word “academic” out of his final version (Giroux, 2007, p. 14). Since social, political and economic circumstances in America have changed so much in the decades since Eisenhower gave this speech, this phrase requires further examination, especially the word “industrial.”

According to Gorenstein (2010, para. 1) reporting for *Yahoo Finance*, the manufacturing sector in America composed about 12% of the economy in 2005, down from 15.9% in 1995 and 28% during its post-World War II peak in 1953. The financial journalist McCormack has similar figures: 11.5% of GDP in 2008, “down from 17 percent in 1999, and 28 percent in 1959” (2009, ¶ 8). Strauss (2008), the senior economist with the Federal Reserve Bank of Chicago, offers comparable numbers regarding the evolution of manufacturing as a share of GDP over time.

**However, lower relative prices in the manufacturing sector
has lead to manufacturing comprising
a smaller share of GDP over time**

figure 3.1, Strauss, 2008, p. 19

Comparable economic indicators of industrial decline are easy to find. The following figures are also all from Strauss, from the same June 25, 2008 presentation by him to the Economic Development Council in Chicago.

Manufacturing employment as a share of national employment has been declining for over 50 years

figure 3.2 Strauss 2008, p. 7

**Not to make a mountain out of a molehill,
but manufacturing employment was increasing up until 1979
and has been moving lower over the past 28 years**

figure 3.3 Strauss 2008, p. 9

However, service sector employment has grown more than fivefold over this period, averaging growth of 2.5% per year since 1947

figure 3.4 Strauss, 2008, p. 10

The dismal economic news about American industry over the last several decades can be repeated ad nauseum. According to McCormack (2009) again,

the U.S. manufacturing sector never emerged from the 2001 recession, which coincided with China's entry into the World Trade Organization. Since 2001, the country has lost 42,400 factories, including 36 percent of factories that employ more than 1,000 workers (which declined from 1,479 to 947), and 38 percent of factories that employ between 500 and 999 employees (from 3,198 to 1,972). An additional 90,000 manufacturing companies are now at risk of going out of business (McCormack, 2009, ¶ 4).

To add more evidence to this train of thought, the seminal *A Nation at Risk* (1983) report specifically warned about severe competition already underway in flagship American industries

like automobiles, steel, and machine tools. More recently (2009), McCormack has cited updated figures in these exact same industrial sectors and they were no more encouraging than those of the original report.

The decline of America's longtime leaders in manufacturing is better known. In 2008, 12 percent (8.7 million) of all the cars produced in the world were made in America. China has now surpassed the United States in motor-vehicle production (9.3 million in 2008), as has Japan (11.56 million). The U.S. steel industry produced 91.5 million tons of steel in 2008, down from the 97.4 million tons in 1999. By comparison, China's steel industry produced 500 million tons in 2008, more than five times the amount of U.S. producers and up from the 124 million tons it produced in 1999, despite the far greater efficiency of U.S. steel production. The U.S. machine-tool industry -- the industry that's the backbone of an industrial economy and the means by which all products are manufactured -- produced \$4.2 billion in equipment in 2008, a paltry 5.1 percent of global output (McCormack, 2009, ¶ 21).

This extensive process of deindustrialization roughly coincided with the establishment of standards-based education in America. This has been a complex interaction mediated in large part by the rise of a corporatist global competitiveness ideology with bipartisan support. On the other hand, the arguments of big business have perhaps been disingenuous. After all, as Giroux notes in his most recent book

power does not work simply through the control and influence of wealth, income, and resources. It also has to legitimate itself, and for that it needs to create a pedagogical culture through which it can promote its ideologies and values (Giroux cited in Olorunda, 2011, ¶ 19).

By the end of this book, I hope to convincingly establish that standards-based education was one of the pedagogical cultures playing a powerful legitimating role in this larger drama. I will be exploring this relationship at greater length in part four of my conclusion.

In light of the essentially “post-industrial” state of America, we must either abandon the word “industrial” or reconceptualize it to mean something closer to “business” or “corporations.” Many of these corporations, while headquartered in America, are no longer based in it for tax purposes. As Phillips (2008) demonstrated convincingly, empires that no longer base their wealth on the manufacture or cultivation of tangible goods or the trade of such goods, instead become

financialized and increasingly produce little else besides ever-more arcane abstract financial instruments, and eventually cease to be powerful empires. This can already be seen in the experience of the Dutch and British empires. Many would argue that it is happening now in America, especially when we look at the preeminent position the “FIRE sector” (finance, insurance, real estate) has taken in the American economy over the last several decades, both as a percentage of GDP and as one of the most important architects in the structuring of the remaining “non-FIRE” components of the economy.

In this chapter, I have defined what I meant by such terms as “business,” “big business,” “corporate leaders,” the “power elite, the “powers that be,” the “super class,” and the “military-industrial complex.” Now that my usage of these terms has been elucidated, I can proceed to explain how these camps have been among the most important proponents in the evolution, establishment, and consolidation of standards-based education over the last three decades.

CHAPTER 4. THE IDEOLOGICAL DRIVERS AND THE HISTORICAL CONTEXT

It is impossible to understand the evolution of standards-based education without understanding the geopolitical and macro-structural economic context in which standards-based education evolved over the last four decades, and especially the last two. This has been a pivotal period of change in the human world in many ways and has garnered many appellations, as analysts have attempted to understand these developments. Leading candidates for labeling these changes include globalization, neoliberalism, the American Century, the Washington consensus/Washington rules, Bretton Woods II, and post-industrialization.

These ideological complexes have more similarities than differences. Furthermore, they all share an emphasis on global competitiveness ideology, which I hope to demonstrate has been a key ideological driver for the establishment of standards-based education. For these reasons, these ideological complexes warrant close examination and precise description. In this chapter, I hope to define the contentious term “globalization,” sketch the historical outlines of the equally contentious term “neoliberalism,” borrow heavily from Andrew Bacevitch’s recent description of the “Washington rules” to compare and contrast these terms, explore the notion held by many that the financial measures of the “Nixon shock” of 1971 constituted a kind of “Bretton Woods II,” and analyze how these related trends can be said to have coalesced into “post-industrialization.”

To begin, I would like to attempt to theorize the term “globalization,” building upon Martell’s (2007) three phase periodization of the term: globalists, skeptics, and transformationalists. Although economic aspects tend to predominate in definitions of this word, I also hope to draw attention to a variety of other aspects as well, microstructural as well as macrostructural. A clear understanding of my use of this word is particularly necessary because “global economic competitiveness” ideology has been such an important ideological driver of this reform idea.

“Globalization” has been one of the most contentious and loaded words in the humanities and social sciences for several decades. Sometimes it is construed broadly to include the beginnings of world systems that began with the early global empires. Sometimes it is used to focus on what happened after the alleged end of all other historical alternatives to capitalist

liberal democracy with the fall of the Soviet Union, best exemplified by Fukuyama's "end of history" thesis (2006).

Given the contentious nature of the term "globalization," I'd like to consider the evolution of its usage over recent years. Martell (2007) offers a compelling model of three waves of globalization theory: the 1) globalists or hyperglobalists, 2) skeptics, and 3) post-skeptics or transformationalists.

Beginning in the 1980s, the globalists offered "strong accounts of the globalization of the economy, politics, and culture and the sweeping away of the significance of territorial boundaries and national economies, states, and cultures" (Martell, 2007, p. 173). They tended to see globalization as an abstraction, an inevitability, an intangible force unmoored from human agency. Many of their presuppositions continue to dominate the educational policy discussion today (Reich, 1991). This period - from the early 1980s through the early 1990s - saw the formulation of much of the rhetoric that helped to justify standards-based education.

The skeptics were critical of this supposed universality and inevitability, and the abstraction of earlier accounts. They highlighted globalization's uneven impact across the world, noted the role of human agency in its construction, and offered more empirical descriptions of its processes. The skeptics were also far less laudatory than the hyperglobalists.

Many in this camp also wondered how truly global an international economic and geopolitical order could be that was so structured and dominated by the nations and "interests" of the United States, Europe and Japan. The skeptics often praised those nation-states able to retain social democratic policies against stiff international pressure to assume neoliberal economics, mobilized by powerful factions, satraps, and minions within this trilateral power block. They also noted that cultural and economic hybridity or "glocalization" often undermined the seemingly all-pervasive homogenization presumed by so much of the hyperglobalist literature.

The post-skeptics or transformationalists seek to walk a middle way between the hyperglobalists and the skeptics. They do not deny that the forces creating an unprecedented international economic interdependence are already well underway and accompanied by a powerful internationalization of culture. Nevertheless, they share many of the concerns of the skeptics: particularly about globalization's uneven impact across the globe and the need for all analysis to remain empirically focused. Unlike many of the skeptics, however, they don't always see globalization as a pejorative term. They often see a positive side as well. In their sensitivity

to the delicate balance between coercion and desire at both the micro- and macro-structural levels, this approach has sometimes been labeled neo-Gramscian (Martell, 2007, p. 178).

The transformationalists also see how the uneven impact of globalization requires a reconceptualization of the traditional “core-periphery” model, one that may need to be replaced by a “more complex stratification,” one with greater inclusion and exclusion, and a “greater polarization between the top and bottom,” between countries as well as within them (Martell, 2007, p. 178). Works on globalization cannot always be neatly assigned to one of these three categories. There are often degrees of overlap.

The third wave, the transformationalist-post-skeptic position, seems to be the one with the greatest theoretical suppleness and empirical explanatory power. Therefore, it will be the one I utilize in this study. Attempting to provide a definitive take on a word as complex as “globalization” may appear a daunting task. Because of its importance to the central arguments of my study, however, I must make the attempt.

The definition of “globalization” in the most authoritative arbiter of the English language on the planet, the Oxford Dictionary of English, is surprisingly vague.

Globalization; noun; The process by which businesses or other organizations develop international influence or start operating on an international scale: fears about the increasing globalization of the world economy (2005).

The Merriam-Webster online dictionary is barely more descriptive, with an exclusive focus on the economy:

Globalization; noun; the act or process of globalizing: the state of being globalized; especially: the development of an increasingly integrated global economy marked especially by free trade, free flow of capital, and the tapping of cheaper foreign labor markets (2010).

Given the political contentiousness surrounding the word, perhaps leading dictionary editors opted for a “less is more” approach. Whatever their motivations, these narrow definitions are less than intellectually satisfying. Their preoccupation with the economic and institutional dimensions of globalization seems to hide deeper meanings.

Some critics see globalization as a kind of code word for global neoliberal economics. In this sense, the Merriam-Webster definition

refers to a very specific form of international economic integration designed in meticulous detail by a network of closely interconnected concentrations of power: multinational corporations, financial institutions, the few powerful states with which they are closely linked, and their international economic institutions (IMF, World Bank, WTO, etc.). Not surprisingly, this form of "globalization" is designed to serve the interests of the designers (Chomsky, 2006, para. 94).

None of these definitions do justice to the poly-semantic richness of the word, however. What about other macro-structural processes beyond economics, social, cultural and political dimensions? A succinct, thorough, and intellectually satisfying definition that captures the macro-structural elements missing from the above-mentioned dictionary definitions can be found on Wikipedia. Building on Bhagwati (2004) and Croucher (2004), it states that

Globalization (or globalisation) describes a process by which regional economies, societies, and cultures have become integrated through a globe-spanning network of communication and trade. The term is sometimes used to refer specifically to economic globalization: the integration of national economies into the international economy through trade, foreign direct investment, capital flows, migration, and the spread of technology. However, globalization is usually recognized as being driven by a combination of economic, technological, socio-cultural, political, and biological factors. The term can also refer to the transnational circulation of ideas, languages, or popular culture through acculturation (Wikipedia, 2010, para. 1).

While this is perhaps the best definition yet, it is still missing the micro-structural piece.

Sassen brings to our attention that

a good part of globalization consists of an enormous variety of micro-processes that begin to denationalize what had been constructed as national — whether policies, capital, political subjectivity, urban spaces, temporal frames, or any other of a variety of dynamics and domains (2006, p. 1).

I part ways with most commentators in that I do not share their preoccupation with the supposed importance of “denationalization.” In fact, I see nation-states becoming stronger under regimes of globalization in many ways. Most analysts, in all three waves of globalization theory, would

probably agree that one of its salient features is the replacement of Keynesian economics with Friedmanite neoliberal economics.

The beginning of this transition in the “periphery” is often associated with the assassination of Allende in Chile in 1973 and Pinochet’s subsequent reliance on the “Chicago boys,” a coterie of economists from the University of Chicago. In the “core,” this transition is usually dated from the elections of Thatcher (1979) and Reagan (1980), and the ascension of Volcker to the Federal Reserve (1979).

Mainstream economic thought typically portrays Friedman and his acolytes as believing in an unfettered “free market” and the reduction of “government interference” in the economy to an absolute minimum. If one looks at the actual implementation and impact of their policies worldwide over the last three decades, however, this is more ideological than empirical.

In fact, I would argue that wherever neoliberal economics have been adopted, we have witnessed a significantly enhanced use of the power of the nation-state to socialize the costs and privatize the benefits of economic activity into corporate coffers. As Klein has argued (2007), it is also difficult to extricate the imposition of neoliberal economics from the concomitant political assault on social welfare policies.

This liberation from all restraints is, in essence, Chicago School economics (otherwise known as neoliberalism or, in the U.S., neoconservatism): not some new invention but capitalism stripped of its Keynesian appendages, capitalism in its monopoly phase, a system that has let itself go – that no longer has to work to keep its customers, that can be as antisocial, antidemocratic and boorish as it wants. As long as Communism was a threat, the gentleman’s agreement that was Keynesianism would live on; once that system lost ground, all traces of compromise could finally be eradicated, thereby fulfilling the purist goal Friedman had set out for his movement a half century earlier (Klein, 2007, p. 253).

In addition to implying a powerful, ongoing, and perhaps even increasing role for the nation-state, Klein provides a useful corrective to those analysts convinced that denationalization is the key to understanding globalization. In the above-mentioned passage she highlights another major factor in globalization that doesn’t always receive the emphasis it deserves: the collapse of “communism.”

What we usually call communism may perhaps be more accurately described as “state capitalism.” Be that as it may, communism did function as an ideological and geopolitical alternative to “global capitalism.” When that alternative “collapsed” and was “discredited,” there was little left to rein in what has been diagnosed by Achbar and Abbott (2004) as the “psychopathic” core of capitalism. For this reason, any historicization of globalization has to take into account its quantum leap forward in scope and tenacity after the fall of the Soviet Bloc.

After having established the shortcomings of the leading contemporary definitions of globalization, I would like to lay out the design specifications for a new definition, a hybrid of the ones discussed above. This definition will:

- 1) Be post-skeptic and transformationalist;
- 2) Incorporate macro-structural processes beyond economics: globalization’s social, cultural and political dimensions;
- 3) Incorporate micro-structuralist processes such as “policies, capital, political subjectivity, urban spaces, temporal frames, or any other of a variety of dynamics and domains” (Sassen, 2006, p. 1) and focus as much attention on individuals as on institutions and abstract social forces;
- 4) Refuse to isolate neoliberal economics from concomitant domestic political changes;
- 5) Recognize globalization as a historical process that began a long time ago, albeit one that underwent profound transformation after the fall of the Soviet bloc, particularly in its greatly enhanced scope, tenacity and hostility to social welfare policies; and
- 6) Assume a simultaneously enhanced and decreased importance for the nation-state.

To put these design specifications in the form of a definition (and acknowledging plagiarism of certain chunks of definitions cited above), I would put it thusly:

“Globalization describes a macro- and micro-structural process by which people, subjectivities, temporal frames, built environments, policies, laws, and mores, local, national and regional economies, societies, cultures, organizations, and a variety of other dynamics and domains have transformed and been transformed by a globe-spanning network of communication and business, driven by a combination of economic, technological, socio-cultural, political, and biological factors that simultaneously enhance and decrease the importance of the nation-state.”

I am one of those critics of globalization who take a long-term view and see globalization as the continuation and intensification of something that began long ago. Nevertheless, I would not quibble with any characterization of a “modern” or “advanced” stage of globalization that began roughly with Thatcher and Reagan. This temporal frame of reference allows us to examine how the various interest groups of the American educational system have conflicted and cohered over time.

In this chapter I theorized the term “globalization,” building upon Martell’s (2007) notion of three main phases in the use of the word. While economic aspects often tend to predominate in definitions, we also need to closely consider cultural and microstructural influences as well. In arriving at a clearer understanding of the word “globalization,” we can also arrive at a clearer understanding of its role it played in underpinning notions of “global economic competitiveness” ideology as well.

There are many candidates for the title of “when neoliberalism began.” Because I am telling an American story I will offer American candidates, largely economic ones. What they tell over the last few decades is largely the story of decline. Legendary magazine publisher Henry Luce famously called the 20th century the “American century” in a 1941 *Life* Magazine editorial (Luce, 1999). Certainly the economic, military, geopolitical, and cultural influence of America in the world after World War II exploded like a supernova and illuminated the remaining portion of the 20th century. The actual period of the explosion, however, was relatively brief.

When did the so-called American century begin? Many accounts start it with the establishment of the international financial arrangements of Bretton Woods in 1944. After World War II, America not only set about constructing an economic order that it would dominate for decades to come, but was “home to more than half of the industrial capacity in the world” (Lynn, 2010, p. 192). Ferguson (2004) encapsulated this truism when he wrote

most historians would agree that, if anything, American economic power after 1945 exceeded that of Britain after 1815, a comparable watershed of power following the final defeat of Napoleonic France (p. 9).

The American reaction to the joint British-French- Israeli actions during Suez Canal crisis of 1956 – especially Eisenhower’s threat to crash the British Pound - further emphasized the passing of the imperial baton from Britain to America.

When did the American century end? When Nixon closed the gold window and initiated other economic reforms during the “Nixon shock” of 1971, reforms that essentially abandoned the Bretton Woods arrangements and ushered in a period sometimes referred to as “Bretton Woods II?” When America became a net debtor nation in 1985? Even if you chart its evolution from Bretton Woods to America’s emergence as a debtor nation that is still only four decades years. Arguably, perhaps, its twilight may have continued until the bursting of the internet bubble in 2000. Some might even contend that with America’s control over the World Bank and International Monetary Fund, possession of the world’s largest military, and the dollar’s (increasingly precarious) status as the international currency of reserve, America enjoys the prerogatives of the American century still and remains the hyperpower hawkish politicians and commentators wish it to be, the “indispensable nation,” as Madeline Albright so memorably put in during a 1998 Today Show interview.

If we have to use force, it is because we are America; we are the indispensable nation. We stand tall and we see further than other countries into the future, and we see the danger here to all of us. (Albright, 1998, ¶ 35)

After the assassination of John F. Kennedy, President Lyndon B. Johnson continued and expanded on Kennedy’s New Frontier with his own Great Society and War on Poverty programs. In this context, a variety of landmark bills were passed and many popular programs inaugurated. To name just a few, these included the *Civil Rights Act* of 1964, the *Voting Rights Act* of 1965, the *Social Security Act* of 1965 (which created Medicare and Medicaid), the *Elementary and Secondary Education Act* of 1965, and the *Higher Education Act* of 1965. In part due to these legislative achievements, and in part due to grass roots activism and civil rebellion across the nation, the 1960s could be called a high water mark for racial, educational, and social justice in the United States.

The oft-mentioned “Sputnik challenge,” stemming from the successful Soviet launch of an artificial satellite in 1957 quickly led to passage of the *National Defense Education Act* of 1958 (Dow, 1997; United States Congress, 1958). This law strived to improve the quality and scope of math, science, and foreign language education in America. Quality remained an important objective of educational laws passed during this period. Equity and equality were rapidly becoming important values as well.

The Republican Nixon and Ford administrations retained and even built on many elements of the Great Society and the War on Poverty. Therefore, we could say that equity and equality were the predominant values of American educational policy during the 1960s and 1970s.

Historical phases do not typically end and begin in neat and tidy caesuras, even with the benefit of hindsight. Instead, they overlap and bleed into one another. Lived experience, does not usually allow us to say “I am in this era” one day and “I am in another era” the next. For this reason, I’d prefer to look at the period of transition from Nixon’s closing of the gold window in 1971 to America’s debtor nation moment of 1985 as the long, slow birth of neoliberalism, globalization, and the Washington consensus – punctuated by the fall of the Soviet Union and the reification of America as “the model and the gate keeper” (Chomsky, 2001, track 1, 1:00).

The net effect of the economic policies enacted by Nixon was to establish the dollar as a fiat currency no longer backed by anything tangible, except perhaps in some cases by America’s alleged military protection.

Brief though it may have been, the ostensive “American Century” was a period of extraordinary wealth for America. For a moment, it seemed the nation could have both guns (extensive foreign military and intelligence involvement throughout the world, the Korean War, the Vietnam War), butter (the New Frontier, Great Society, and War on Poverty programs), and significant unilateral control over key multilateral organizations like the United Nations, World Bank, and North Atlantic Treaty Organization. Even after it is stopped being a net creditor in 1983, America still had petrodollars for the security guarantees of the Carter Persian Gulf doctrine, a significant military to make these threats credible, significant international prestige, and the dollar functioning as the international currency of reserve.

Countries that received dollars for their exports to the United States, especially oil-producing countries, were no longer able to freely convert them to gold after Nixon closed the gold window in 1971. Since oil was denominated in dollars, they began to park their earnings (“petrodollars”) in U.S. Treasury bills. This created an enormous reservoir of foreign capital that could be tapped relatively easily by the federal government, typically at relatively low interest rates. Politicians know they can’t get elected campaigning on austerity and discipline, when the honest truth about difficult choices can be left to succeeding politicians. Deficits began to soar during the Reagan administration (Hudson, 2008).

Speaking for the “left,” Zbigniew Brzezinski said much the same thing as the neoconservative notion of a security umbrella as one of the last things America can still produce, in his 1998 book *The Grand Chessboard*, an archetypical expression of the Washington rules/Washington consensus

To put it in a terminology that harkens back to the more brutal age of ancient empires, the three grand imperatives of imperial geostrategy are to prevent collusion and maintain security dependence among the vassals, to keep tributaries pliant and protected, and to keep the barbarians from coming together (Brzezinski, 1998, p. 40).

The American economy began to become detached from tangible manufacturing, based on a currency whose value was nothing more than the collectively agreed upon fiction that it had value, and whose profits were ever-more dependent upon ever-more complex financial instruments. Increasingly arcane financial maneuvers were needed to keep this house of cards standing. The enormous profitability of these maneuvers led to an increasingly central role in the American economy for the finance, insurance, and real estate sector— the FIRE sector. As American business shipped its industrial capacity overseas to squeeze every last penny of profit out of production by taking advantage of dramatically cheaper foreign labor costs, American wealth (and labor) had less to do with the creation of tangible goods in America. Historically, the rise of a predominant finance capital phase of a country’s capitalist development tends to signal the terminal phase in imperialist evolution (Phillips, 2008).

During this period after the demise of the classic period of the American century, we saw the rise of neoliberalism and globalization, which would provide so much of the geopolitical and macrostructural economic context that made the rise of standards-based possible, especially the key ideological driver of global competitiveness ideology, even as American corporations went on a decades-long program of aggressively outsourcing production abroad, contradicting their very calls for competitiveness.

These trends were aided by the rise of the Chicago School of Economics (as exemplified by the work of Milton Friedman) in the late 1970s and early 1980s, the election of politicians like Thatcher and Reagan (who were deeply sympathetic to economics programs that facilitated the privatization of many formerly public functions), reduced social welfare spending, and the roll back of many of the gains in the social contract made by the Great Society, New Frontier, New Deal, and even the classic progressive era itself, taking us in many ways back to the

unbridled laissez-faire capitalism of the Robber Baron era. There are a number of salient features of that transitional period of the 1970s-1980s, which I would argue are what put the “post” in “post-industrial” and can be used to mark the transition a number of the other historical terms described in this chapter. These may include:

- 1) Nixon’s withdrawal of the dollar from the gold standard;
- 2) The rise of OPEC and the petrodollar;
- 3) Nixon’s withdrawal from the Bretton Woods regime;
- 4) America’s transformation from world’s greatest creditor nation to world’s greatest debtor nation;
- 5) The withering of America’s manufacturing base;
- 6) Advances in computing and telecommunications;
- 7) The advent of the instantaneous international transfer of finance capital due to advances in computing and telecommunications;
- 8) The peak of American real wages;
- 9) The lowest average amount of hours per year Americans would ever work, which has been rising steadily ever since then;
- 10) The peak and rollback of the New Deal/Great Society programs;
- 11) A retrenchment against many of the key values of the 1960s counter-culture with the rise of culture war politics;
- 12) The establishment of a well-funded and well-organized intellectual infrastructure of think tanks, publishers, and pundits for the right wing;
- 13) An ongoing atomization of social life;
- 14) Intensified consolidation of media ownership; and
- 15) Ever increasing social pressure for participation in emotion-driven, debt-based consumer capitalism.

One of America’s responses to the long-term economic decline which began during this period has been a metastization of the militarism already long-present in the psyche and historical record of America, a militarism which “won” America a continent, made it an overseas imperial power by 1898, and established it as the “policeman of the world” after World War II. Ironically, even after the fall of the Soviet Union, our supposed arch-nemesis, the rationale for our entire defense establishment, defense spending did not decrease but actually increased.

Classic texts such by Blum (2008) and Johnson (2004, 2007) offer us definitive accounts of this militarism, especially as it evolved with the “national security state” since World War II.

A more recent account by Bacevitch highlights the manner in which many of the key ideological presuppositions of post-war American militarism segued seamlessly into neoliberalism and globalization in the guise of what he calls the *Washington Rules* (2010), or what is often also referred to as the “Washington consensus.” Bacevitch sees the central ideas of the Washington consensus as a “sacred trinity”:

an abiding conviction that the minimum essentials of international peace and order require the United States to maintain a *global military presence*, to configure its forces for *global power projection*, and to counter existing or anticipated threats by relying on a policy of *global interventionism* (Bacevitch, 2010, p. 19).

Bacevitch also notes that “Washington”

is less a geographic expression than a set of interlocking institutions headed by people who, whether acting officially or unofficially, are able to put a thumb on the helm of state. Washington, in this sense, includes the upper echelons of the executive, legislative, and judicial branches of the federal government. It encompasses the principal components of the national security state – the departments of Defense, State, and, more recently, Homeland Security, along with various agencies comprising the intelligence and federal law enforcement communities. Its ranks extend to select think tanks and interest groups. Lawyers, lobbyists, fixers, former officials, and retired military officers who still enjoy access are members in good standing. Yet Washington also reaches beyond the Beltway to include big banks and other financial institutions, defense contractors and major corporations, television networks and elite publications like the *New York Times*, even quasi-academic entities like the Council on Foreign Relations and Harvard's Kennedy School of Government. With rare exceptions, acceptance of the Washington rules forms a prerequisite for entry into this world (Bacevitch, 2010, p. 19).

Bacevitch's conception of an abstract, placeless “Washington” is not far from how I tried to define “big business,” the “power elite,” and related categories in chapter three. In fact, it would not be too much of a stretch to say that he is describing those functionaries and technocrats who help keep the power of the state in the service of these captains of industry.

This is also, to be sure, a profoundly bipartisan consensus. Paradigmatic quotes in support of its vital necessity and “natural” prerogatives could be found from every modern president since Reagan: humanitarian rationales for brutal military interventions, quite often followed by the imposition of neoliberal economics (GRITtv with Laura Flanders, 2010).

In the late 1960s and early 1970s, a coalition began to form between the corporate elite and movement conservatives. Both wanted to drive a stake through the heart of the 1960s counterculture, albeit for different reasons. The former, to begin pushing back against a perceived assault on the foundations of the American free enterprise system. The latter, to combat the perceived licentiousness, ungodliness, unconventionality, unAmericanism, departure from all things good and righteous, fall from American greatness, and general weirdness. Both were significantly aided and abetted by the rise of the Christian right, especially evangelicals. These three factions would prove to be a potent combination facilitating the consolidation of the complex of related education reform ideas (standards-based education, high stakes testing, and accountability) that would emerge in the next three decades. As the Democrats began moving to the right under Carter, this became a far more bipartisan process than is claimed by Apple (2006) or Berliner and Biddle (1996). To credit the rise of this complex of reform models primarily to the “right” misses a major point. This complex did not rise to dominance due to the exertions of one party or the other. Rather, both parties pledged allegiance to a larger yet mostly unspoken consensus: fealty to corporate interests and all of the assumptions inherent therein: that we are all homo economicus, indefinite economic growth is possible, and happiness (or “marginal utility”) is to be found in consumption and participation in the wage economy.

Many of these themes were amplified by the same notions of American exceptionalism which also helped spawn the national security state and enhanced militarism abroad. At first glance, these concepts might seem distantly related to recent developments in education reform. In fact, they are closely related. The American creed has always been that America is a “city on the hill,” ever since John Winthrop delivered his famous sermon *A Model of Christian Charity* on the *Arabella* in 1630 en route from Britain to the Massachusetts Bay in which the phrase was first proclaimed when the Puritans sailed to Massachusetts (Winthrop, 1630, para. 56). This implied the new Puritan settlement (and later America itself) would be uniquely beloved by God, whose every action would be moral because of that relationship.

In the final analysis, this exceptionalism and the militarism it eventually helped to justify has been transformed into serving as a major bulwark of consumerism, built on easy personal and federal credit. Unfortunately, consumerism has eaten the globe and the era of easy credit is collapsing with the expense of continuing the “American century” beyond the Nixon shock and Bretton Woods II.

This also comes at a time when America transitioned from a draft army that expanded and contracts during conflicts as a professional standing army since the end of the Vietnam War. As Bacevich’s recent works (2005, 2010) have suggested, the creation of a volunteer army contributed heavily to the normalization of war as America began its imperial decline. In statecraft, this is often referred to as “interests of state.” In America’s case, this is a euphemism to protect its privileged place at the feeding trough of the world’s resources. In this sense, war is not a political “failure” but the system of international relations working exactly as intended, with key financiers funding both sides of the Napoleonic Wars.

In this chapter, I have attempted to define and provide historical trajectories for some of the most popular and salient descriptions of recent geopolitical and macro-structural economic developments, the contexts that standards-based education grew out of. These included such contentious terms as globalization, neoliberalism, post-industrialism, the Washington consensus/Washington rules, and Bretton Woods II. At the heart of all of these ideas is the global competitiveness ideology, which is a central component of standards-based education.

CHAPTER 5. THE UNEASY ALLIANCE BETWEEN THE CORPORATE ELITE AND THE MOVEMENT CONSERVATIVES

This chapter hopes to demonstrate that, during the late 1960s and early 1970s, the corporate elite and movement conservatives began to collaborate closely on the creation of a multi-faceted intellectual, policy, and legal framework of think tanks, academic posts, media outlets, litigation centers, and other related initiatives.

In doing so, many specific historical events such as the rise of the Heritage Foundation and Business Roundtable will be described. These entities in particular exemplify how the groundwork was set for the concerns of business to begin infiltrating the education policy debate during the Reagan-Bush era. The ideas which will be discussed must also be considered in relation to the beginning of major political and economic changes in America that have only accelerated up to the present. Not only the rise of the right, but also with President Carter, we see the beginning of a Democratic political identity that gradually began disavowing a significant role for the federal government in fostering economic and social justice, one that instead negotiates fealty to “free market” economics, corporate dominance of much of American economic and cultural life, and adherence to a particularly robust version of American militarism, a militarism that Bacevich (2010) has recently characterized as the “Washington rules,” which Blum (2008) credits with over 50 major military and C.I.A. interventions abroad since World War II. Many of the think tanks and national big business membership organizations that emerged or were rejuvenated during this period would later go on to become influential proponents of standards-based education as the reform model unfolded over the ensuing decades.

In *The Power Elite*, Mills made a distinction between what he called “the ‘old guard’ of practical conservatives and the ‘business liberals,’ or sophisticated conservatives” (1956, p. 122).

What the old guard represents is the outlook of, if not always the intelligent interests, of the more narrow economic concerns. What the business liberals represent is the outlook and the interest of the newer propertied class as a whole. They are ‘sophisticated’ because they are more flexible in adjusting to such political facts of life as the New Deal and big labor (Mills, 1956, p. 122).

I would disagree with Mills that business liberals or sophisticated conservatives represent the “newer propertied class.” For example, Franklin Delano Roosevelt, the impresario of the New

Deal himself is a patrician from what, by American standards, is an ancient and privileged dynasty. Also, as the economic and political centers of gravity shifted away from the Northeast towards the Sunbelt and the West after World War II, many of those who made their fortunes in these regions and in newer industries like oil, munitions, chemicals, pharmaceuticals, and aerospace were often the most implacable foes of organized labor and any type of government involvement in the economy. One also has to wonder how “practical” such a thoroughgoing intransigence on the part of so many so-called practical conservatives is. After all, old money doesn’t get to be old money without at least some degree of practicality. Still further, as one looks back on the history of 20th century American conservatism, one is apt to think of someone urbane, erudite, and well-spoken as a sophisticated conservative; say, a William F. Buckley, Jr. or a George Will.

Nevertheless, Mills’ essential point of two Weberian ideal types - of pragmatic and flexible sophisticated conservatives (willing to work within prevailing political trends) and bellicose practical conservatives (who give no quarter when it comes to being able to externalize the costs while privatizing the profits of their business empires) does seem to be largely borne out by the historical record.

Ever since Roosevelt dramatically enhanced the role of the federal government in the economy and made a significant accommodation with big labor, small activist factions of the corporate elite – practical conservatives - have been fighting back against what they saw as the infiltration of socialism - or worse - into the body politic. As the temper of the times since World War II was resoundingly in favor of business liberals, however, their efforts were largely ineffectual until the progressive aspirations of Johnson’s Great Society began collapsing under the weight of stagflation and domestic opposition to the Vietnam War. Though largely marginalized at the time, many initiatives undertaken by practical conservatives since the New Deal did succeed in cumulatively laying the foundation for the union of big business and movement conservatives beginning in the late 1960s and early 1970s.

It could be argued that these began with the initiatives of nationwide business membership groups like the National Association of Manufacturers and Chamber of Commerce. Since they were, in the main, practical conservatives, their efforts were largely futile.

The National Association of Manufacturers is the oldest business association, founded in 1894. Although its policies and membership have fluctuated over the years, it has tended to take

anti-union stances and to represent a significant amount of small- to medium-sized businesses. As Levitan and Cooper state, “in 1981, 80 percent [of its member firms] employed fewer than 500 employees” (1984, p. 14). It also typically represents a significant number of Fortune 500 companies as well. They further claim that in 1981, “about two-fifths of the more than 200 National Association of Manufacturers board members were employed by firms on the Fortune 500 list” (Levitan and Cooper, 1984, pp. 13-14). In spite of this apparent clout, they have not always met with much success in the legislative arena (Levitan and Cooper, 1984, p. 13-14).

The Chamber of Commerce was created in 1912 with the assistance of National Association of Manufacturers. In many ways, it has acquired a stature and influence which dwarfs that of its parent organization. Like National Association of Manufacturers, the Chamber of Commerce too represents a large number of small- to medium-sized businesses (87% of Chamber of Commerce members employ less than 50 people), while a strong influence at the board and policy-making levels is still accorded to executives from Fortune 500 companies (Levitan and Cooper, 1984, p. 17-18).

Other organizations were also dedicated to challenging the nascent power of labor unions and expansive state roles in national economies. One prominent one was the Mont Pelerin Society, founded in Switzerland in 1947 by Friedrich von Hayek. Although initially composed primarily of European free market intellectuals and academics, economist Milton Friedman and other Americans were in attendance at the inaugural meeting as well. Over the course of the 1950s, American businessmen, economic policy-makers, journalists, conservative philanthropists, and think tank staffers began joining as well. In September 1958, the society held its first American meeting. The keynote address given by Ludwig von Mises on *Liberty and Property* hinted at themes central to the society’s mission – an identification of “human liberty” with “the free market place” (Phillips-Fein, 2009, p. 45-51).

Yet another important conservative organization was the John Birch Society, founded by a former vice president of the National Association of Manufacturers, Robert Welch, and 11 other industrialists in 1958. They saw Eisenhower’s embrace of the salient features of the New Deal and moderate Republicanism as nothing less than communist infiltration, with Ike himself cast an agent of Kremlin influence (Phillips-Fein, 2009, p. 59).

Other centers of practical conservative ideology and policy talk were new think tanks like the American Enterprise Association, founded in 1943 to critique Keynesian trends in moderate

Republicanism as much as the prevailing liberal consensus, while still dutifully avoiding accusations of “being a mere pawn of business” (Phillips-Fein, 2009, p. 60-61).

In spite of this objective, the new organization didn’t hesitate to fill its board of trustees with representatives of blue chip companies such as “Coca Cola, Socony Mobil Oil Company, U.S. Steel, and Eli Lilly” (Phillips-Fein, 2009, p. 60). A 1950 Congressional investigation determined that its funding came from similar sources as well: “General Motors (\$7,500 in 1949), Ford (\$5,000), Chrysler (\$3,750), and Con Edison (\$3,400)” as well as \$5,000 from industrialist Lammot duPont (cited in Phillips-Fein, 2009, p. 61-62). The final Congressional report asked the pointed question “Can we assume that the Nation’s largest industries would continue to support AEA if it were sponsoring views with which these industries were in basic disagreement?” (cited in Phillips-Fein, 2009, p. 62). In spite of their concerns, Congress did not strip AEA of its tax-exempt status, although the scrutiny did create a brief but significant crisis for the young organization (Phillips-Fein, 2009, p. 62), one compounded by the death of its founder in 1951, the businessman Lewis Brown. For a moment, AEA’s very existence seemed to be in jeopardy.

The installation of a new board chairman, General Electric chair A.D. Marshall, and his hiring of William J. Baroody, a “staff economist from the U.S. Chamber of Commerce” as executive vice president, breathed new life into the group (Smith, 1991, p. 175-176). Among Baroody’s responsibilities was to serve as the main fundraiser and research administrator for AEA (Smith, 1991, p. 176). He recognized that a liberal consensus was dominating the conventional wisdom and conservative ideas were relegated to the margins. As Columbia University professor Lionel Trilling observed in 1950:

In the United States at this time liberalism is not only the dominant but even the sole intellectual tradition. For it is the plain fact that nowadays there are no conservative or reactionary ideas in general circulation...only...irritable mental gestures which seek to resemble ideas (Trilling, 1950, p. ix).

This consensus lasted well into the 1960s, with Kennedy’s New Frontier and Johnson’s Great Society being widely seen today as high water marks of mainstream liberalism, matched only by the original Progressive era (from the 1890s to the 1920s) and the New Deal of the 1930s. As the economist John Kenneth Galbraith noted in 1964: “with regard to the designation ‘liberal,’ almost everyone now so describes himself” (cited in Lapham, 2004, para. 3). After initial

resistance to the New Deal, collective bargaining and government mandates were by and large tolerated in the boardrooms, if perhaps begrudgingly. Keynesian economics was firmly in the saddle and entities like the Business Advisory Council and the Committee for Economic Development, “which saw government as having a role in tempering the business cycle and in limiting the inequities or addressing the externalities of unregulated capitalism,” garnered far more attention and exercised far more clout than did the upstart AEA (Judis, 2000, p. 109, 119).

Baroody, while perhaps not an original thinker, was nevertheless a very gifted social entrepreneur who saw that the post-war liberal consensus emanated from the power of ideas. Whoever succeeded in marketing their ideas most effectively might eventually succeed in altering that consensus. In this way, both his personal career and the organizational trajectory of AEA provide a crucial foreshadowing of the personalities and processes that would begin in earnest in the early 1970s. As he wrote to a fundraising prospect in 1959:

I, for one, have been long convinced that the climate of a particular society is, to a substantial degree, the product of ideas emanating from its thought leaders – and ideas are the most powerful of forces. The leftist movement derives a substantial portion of its strength from its virtual monopoly of the so-called intellectual segment of American society through systematic employment of techniques and devices designed to establish what might loosely be referred to as an intellectual reservoir of leftist ideology (cited in Phillips-Fein, 2009, p. 63).

It was Baroody’s hope that AEA could emulate these techniques and develop a comparable “intellectual reservoir” of conservative ideas. He threw himself into his work with passion and drive, recognizing that “it will take time, financial resources, and the exercise of good brain power” (cited in Phillips-Fein, 2009, p. 63).

Fortunately, Baroody proved as adroit a fundraiser as he was a vision-caster. “By 1958, AEA was receiving contributions from twenty-six of the fifty largest industrial corporations in the country” as well as “donations of \$10,000 or more from companies such as Allen-Bradley, Ford, General Motors, General Electric, Socony Mobil, and U.S. Steel” (Phillips-Fein, 2009, p. 65). By 1960, AEA had grown to 12 employees (Smith, 1991, p. 176) and had an annual budget of \$230,000 (Smith, 1991, p. 176) or \$900,000 (Micklethwait and Woolridge, 2004, p. 77), depending on your source. Even if we take the higher figure of \$900,000, it was still “less than a fifth of that of the Brookings Institution” (Micklethwait and Woolridge, 2004, p. 77).

In fact, perhaps due to his success in corporate fundraising (and perhaps due to memories of the 1950 Congressional investigation as well), Baroody understood the need for AEA to downplay their business connections, to help foster the appearance of their organization as a bastion of objective analysis. To that end, AEA changed its name to the American Enterprise Institute for Public Policy Research in 1962 (Phillips-Fein, 2009, p. 66).

This did not end government scrutiny of the American Enterprise Institute (AEI), however. In 1964, Baroody became a senior advisor to the Goldwater campaign, with special responsibility for organizing the writing of Goldwater's "speeches and position papers and consulting on an almost daily basis with Goldwater" (Edwards, 1998, para. 19). Although one historian claims he took "full official leave" from AEI to do this work, his political role as one of the leaders of Goldwater's brain trust did not go unnoticed (Edwards, 1998, para. 19). After the election was over and Goldwater suffered one of the historic drubbings in American presidential politics, the House Subcommittee on Small Business chaired by Representative Wright Patman subpoenaed the tax records of AEI "and the IRS initiated a thorough two-year investigation" (Judis, 2000, p. 123). Alarmed by the scrutiny, AEI's board of trustees considered firing Baroody. Although they wound up retaining him, he dramatically scaled back overtly obvious attempts at influencing the federal legislative process and made a conscious effort to enhance the bipartisan appearance of AEI.

To the true believers in the nascent conservative movement, especially younger ones active in government in Washington at the time, this was apostasy of the highest order. AEI was coming to be seen by some movement conservatives as being too well mannered to have a very decisive impact on policy-making. They thought they needed a more pugnacious force for the insertion of conservative values into the policy debate, a counterweight to what they saw as the powerful influence of the liberal Brookings Institution. This involved swimming upstream against some very powerful intellectual and political currents, however, as the "basic American consensus at the time was firmly liberal in character and feeling, assured of a clear majority in both chambers of Congress as well as a sympathetic audience in the print and broadcast press" (Lapham, 2004, para. 1).

It wasn't just movement conservatives who were starting to feel the need for an enhanced right-wing ideological infrastructure in the late 1960s and early 1970s. It was spreading among corporate leaders and the haute bourgeoisie as well. Patrician eastern establishment writer and

long-time editor of *Harper's Magazine* Lewis Lapham captured the mood of these sectors with a description of his experience at the Bohemian Grove in northern California during 1968, a stomping ground of the power elite and perennial bête noire of conspiracy theorists. Here the “misgivings” of the participants “were indistinguishable from panic” (Lapham, 2004, para. 12). These captains of industry and well-placed agenda-setters had a difficult time understanding the riots decimating American cities, a spate of political assassinations, opposition to the Vietnam War at home and the fragging of its officers abroad, the hippie/countercultural movement in general, and escalating antipathy to the free market system. In addition, a champion of their cause and class interests (of sorts), Barry Goldwater, had recently been trounced by Lyndon Johnson during the 1964 presidential election.

Many commentators over the years have noted that the Goldwater campaign resembled not so much a political campaign as a social movement. It may also be considered a symptom of the gradual shift away from the “Nelson Rockefeller” wing of the Republicans towards the rapidly growing power of the Sunbelt and West, and the prelude to a groundswell of reactionary populism within the party.

While the moral, political, and economic ground seemed to be shifting out from under the feet of old money and their technocrats, many of them were at a loss as to how to conceptualize it, even more so as to how to fight back against a seemingly all-powerful enemy. Their “fear was palpable and genuine...although they knew they were in trouble, they didn't know why. Ideas apparently mattered, and words were maybe more important than they had guessed; unfortunately, they didn't have any” (Lapham, 2004, para. 13).

Lapham opined that “Goldwater's autobiography, *The Conscience of a Conservative*, William F. Buckley's editorials in *National Review*, and the novels of Ayn Rand” were about the extent of their stock of ideas at this time (Lapham, 2004, para. 13). To this brief list, we might add books that have since become canonical to the free market intellectual tradition, like von Hayek's *The Road to Serfdom* (1944), Ludwig von Mises' *Planned Chaos* (1947), and Friedman's *Capitalism and Freedom* (1962). We might also include the key works of traditionalists who pined for the eternal verities and clear class positions of a prelapsarian, preindustrial society, like Peter Vierick's *But – I'm a Conservative* (1940), Richard Weaver's *Ideas Have Consequences* (1948), Russell Kirk's *The Conservative Mind* (1953), and Robert Nisbit's *The Quest for Community* (1953). The early “apostate leftists” bear mentioning as well,

people like Whittaker Chambers (*Witness*, 1952) and Frank Meyer (*In Defense of Freedom*, 1962). The work of an individual often touted as the godfather of neoconservatism, Leo Strauss, would be another candidate for inclusion on this list, as would Phyllis Schlafly's paean to the Goldwater candidacy *A Choice Not An Echo* (1964), and perhaps a few others.

Nevertheless, Lapham's essential point remains valid. The intellectual infrastructure of the right during the post-World War II period was nowhere near as extensive as that of the liberal consensus (Mattson, 2008). What did exist was outside of the mainstream and had relatively little impact on the conventional wisdom of the day. A mish-mash of libertarian free marketeers, traditionalists, and strident anti-communists/anti-liberals, this group of work also offered little in the way of a consistent ideology.

What movement conservatives and the corporate elite needed were new sources of ideas and a new sense of how to use them to engage with the political process. In the concrete policy realm of Washington, D.C., these needs were felt most acutely by a number of young Congressional staffers and presidential aides, some of whom would later be considered architects of the rise of the modern right.

In 1971, two young Goldwater conservatives, 28 year old Paul Weyrich, press secretary to Senator Gordon Allott (R-CO) and 30 year old Edwin Feulner, administrative assistant to Congressman Philip Crane (R-IL) were having one of their frequent lunches together at the Congressional canteen and reviewing a brief issued by AEI on government support for research and development of a supersonic transport airplane, an issue then before Congress. As congressional staffers, they found the information in the report to be fair and concise. The only problem was that the report was released two days after the Senate had already voted 51-46 to halt the project (Edwards, 1998, para. 13-16).

Weyrich called Baroody, head of AEI, and told him "Great report. Why didn't we get it sooner?" (cited in Edwards, 1998, para. 17). Baroody replied "we didn't want to try to affect the outcome of the vote" (cited in Edwards, 1998, para. 18). According to Feulner, "it was at that moment that Paul and I decided that conservatives needed an independent research institute designed to influence the policy debate as it was occurring in Congress – before decisions were made" (cited in Edwards, 1998, para. 21).

Another version of the moment of creation of the Heritage Foundation was when Weyrich surreptitiously sat in on a meeting of a liberal coalition which included

a dozen congressional aides, a think-tank policy wonk, and a cadre of Democratic interest groups, all coordinating sympathetic op-eds, studies, and demonstrations in an effort to push through a housing bill. Suddenly Weyrich understood not only his enemy but his life calling: to replace the liberal establishment with a conservative one that would guide the movement, at last, out of the wilderness (Grann, 1997, para. 9).

Some consider the Conservative Lunch Club formed by Weyrich, congressional aide Trent Lott, and “Weyrich’s coworker in Allott’s office,” George Will, as a key nucleus of this burgeoning movement (Brock, 2004, p. 43). Others see it in what this club evolved into during 1971-1973, two organizations independent of Congress but nevertheless dedicated to analysis of Congressional policy, the House Republican Study Committee and Senate Steering Committee (Grann, 1997, para. 10; Smith, 1991, p. 199). By 1973, this effort had formalized to such an extent that “conservative congressmen hired an executive director to head their Republican Study Committee” (Smith, 1991, p. 199).

Still others point to the importance of a 1968 meeting between James Lucier, “an assistant to Senator Strom Thurmond,” (R-SC), Weyrich, and Victor Fediay “an analyst at the Library of Congress” during which they discussed the need for a conservative counterpart to Brookings which could provide senators with timely information on issues of the day (Edwards, 1998, para. 25). The trio spent the rest of the year trying to interest corporate representatives in the idea, to no avail (Edwards, 1998, para. 25). In 1969 the trio, joined by William Roberts, “a professor of law at the Catholic University of America” flew to Wisconsin to confer with Frederic (Fritz) Rensch, “a long time friend and mentor” of Weyrich (Edwards, 1998, para. 26). After meeting with the delegation, Rensch agreed to write a business plan and budget for the proposed organization and spent the summer of 1969 doing so in the office of Senator Strom Thurmond (Edwards, 1998, para. 26-33). The entity was to be called the Analysis and Research Association (ARA) and to be funded initially at \$80,000 per year (Edwards, 1998, para. 33).

For the rest of 1969 and early 1970, the participants tried to pique the interest of corporate America with their proposal, with no success (Edwards, 1998, para. 34). In the midst of these efforts, during the summer of 1970, Weyrich was given a letter from Jack Wilson, the newly appointed “assistant for political affairs” of Joseph Coors, the Denver brewing magnate (Edwards, 1998, para. 35). Coors had directed Wilson “to conduct a nationwide search for the right ‘investment’ in the conservative movement” in the course of which Wilson “sent letters to a

long list of prominent political figures, including Colorado's senior U.S. Senator Gordon Allott, asking for suggestions" (Edwards, 1998, para. 36).

According to the authorized history of the Heritage Foundation, Weyrich's hands started to tremble as he read the letter. He immediately called Wilson and said, "We need to talk – I have an opportunity in mind for Mr. Coors" (Edwards, 1998, para. 37).

Wilson came out to Washington to confer with Weyrich, Lucier, and others. Coors followed. Weyrich arranged meetings for Coors with Senators Cliff Hansen (R-WY) and Strom Thurmond (R-SC), Congressmen Henry Schadeberg (R-WI) and Ed Foreman (R-NM), "and Walter Mote, an aide to Vice President Agnew" (Edwards, 1998, para. 38). Although Coors was receptive, he was also considering donating money to AEI. Eager to keep their dreams for a new think tank alive, Weyrich arranged for himself, Feulner, Coors, and Wilson to meet with Lyn Nofziger, "a deputy assistant to President Nixon for congressional relations" in Nofziger's office (Edwards, 1998, para. 39).

Coors asked Nofziger for his opinion of AEI. Nofziger walked to a bookshelf, "blew some dust off of an AEI study" and said "that's what they're good for – collecting dust" (Edwards, 1998, para. 41). Coors got on-board. He donated \$250,000 for 1971-1972 (Edwards, 1998, para. 42), Lucier became president and Wilson treasurer, and ARA set up shop near the Supreme Court (Edwards, 1998, para. 44) with Weyrich as its director.

ARA was beset by operational problems from the start. Coors has said "they were dedicated but not unified" (Edwards, 1998, para. 47). Before long, Wilson told Weyrich that they would have to try again as a different entity (Edwards, 1998, para. 47). They commandeered "a dormant tax-exempt organization," the Robert M. Schuchman Memorial Foundation (Edwards, 1998, para. 48) and installed Weyrich, Coors, Wilson, and Feulner on the board.

Coors was to become a charter member in a small "cadre of ultraconservative and self-mythologizing millionaires bent on rescuing the country from the hideous grasp of Satanic liberalism" (Lapham, 2004, para. 8). Besides Coors, these included "Richard Mellon Scaife in Pittsburgh, Lynde and Harry Bradley in Milwaukee, John Olin in New York City, the Smith Richardson family in North Carolina, and David and Charles Koch of Wichita" (Lapham, 2004, para. 16).

Richard Mellon Scaife of Pittsburgh was an heir to the Mellon oil and banking fortune, who had won control of the family foundations after feuding with his sister over funding

priorities. Lynde and Harry Bradley were two brothers who developed a prosperous electronics company, Allen-Bradley. Harry was a dedicated member of the John Birch Society. When Allen-Bradley was sold to Rockwell International in 1985, it significantly improved the financial position of the foundation, which often gave to academics and intellectuals (Micklethwait and Wooldridge, 2004, p. 79). John Olin earned his money in chemicals and munitions (Institute for Policy Studies Right Web, 2009, para. 2). The Smith Richardsons were heirs to the Vicks line of medicines and balms (Smith Richardson Foundation). Fred Koch, the father of David and Charles Koch, had made the family fortune in oil and gas and his sons developed a penchant for donating to libertarian causes (Micklethwait and Wooldridge, 2004, p. 78).

These “ultraconservative and self-mythologizing millionaires” directed the foundations under their control to fund programs with the conscious intent of “reshaping the public policy agenda and constructing a network of conservative institutions and scholars” (Smith, 1991, p. 181). The Philanthropy Roundtable provided many of these individuals and foundation staffers with the opportunity to network, calibrate rhetoric, and coordinate funding priorities (Hazen, 2005, para. 15).

This incarnation of the prototype of the Heritage Foundation as the Robert M. Schuchman Memorial Foundation quickly encountered problems as well, caused by a rift between “members of the old board [who] preferred a more traditional approach to public policy, relying on conferences and the publication of papers” and “new members, led by Weyrich and Feulner, who wanted to affect the legislative process promptly and directly” (Edwards, 1998, para. 50). Coors told Weyrich and Feulner to try again with a third entity. On February 16, 1973, the Heritage Foundation was incorporated in the District of Columbia (Edwards, 1998, para. 53). During the Thanksgiving holiday of 1973, they received their Internal Revenue Service letter certifying their tax-exempt status, effective November 27 (Edwards, 1998, para. 56). The next business day, the Heritage Foundation began operation, retaining Schuchman’s small staff of 10 (Edwards, 1998, para. 57-58).

Richard Mellon Scaife of Pittsburgh joined Coors as a financial backer with an initial contribution of \$900,000 (Edwards, 1998, para. 49; Smith, 1991, p. 200; Micklethwait and Wooldridge; Judis, 2000, p. 126). Early financial backers besides Coors and Mellon Scaife included the Nobel Foundation of Oklahoma and the John M. Olin Foundation (Smith, 1991, p. 200).

Weyrich has variously been called the Lenin of the right (Micklethwait and Woolridge, 2004, p. 81) and the Robespierre of the right (Grann, 1997), probably because of his ambitious vision, extraordinary gift for organization, obsessive concern for ideological purity (even among the faithful on the right), and often violent rhetoric. As an example of his rhetoric, in 1973 Weyrich said: “We are different from previous generations of conservatives. We are no longer working to preserve the status quo. We are radicals, working to overturn the present power structure of the country” (cited in Grann, 1997, para. 10). Shortly thereafter, Weyrich also said “It may not be with bullets but it is a war nevertheless. It is a war of ideology, it’s a war of ideas. It’s a war about our way of life” (cited in Grann, 1997, 11). According to Weyrich himself, his own views were neither those of Lenin nor Robespierre but rather those of a different authoritarian. “My view is Maoist. I believe you have to control the countryside and then the capital will eventually fall” (Grann, 1997, para. 30).

Nevertheless, the skills of a firebrand and doctrinal enforcer are not always those of an operational manager. His brief tenure of less than a year as founding director of the Heritage Foundation appears to have been rather tumultuous. The authorized history of the Heritage Foundation describes his March 1974 departure charitably, with Weyrich “guided as usual by his activist impulses” to stave off disaster for the Republican party in the Fall elections through the creation of the Committee for the Survival of a Free Congress (Edwards, 1998, para. 61), a political action committee, and its counterpart, the Free Congress Foundation (Grann, 1997, para. 11).

Other accounts are less charitable. The magazine *New Republic* characterized him as “a case study of the conservative mind – a metaphor for the right’s deep-seated inability to accept the compromising nature of power” (Grann, 1997, para. 5). In the Grann piece, *Robespierre of the Right*, Weyrich is portrayed as the conservative nerd from hell, “given to storming around the office, his normally pale skin blood-red, his pants pulled high above his belly, lecturing those around him on how to be good conservatives” (Grann, 1997, para. 11). It seems Weyrich was more comfortable as an insurgent, a rebellious outsider, than as the operational manager of a functional ongoing concern that was rapidly becoming a part of the very establishment he so despised. He lasted barely a year as director.

After the new president, Jerry James, left within a few months, he was succeeded by a more effective leader, Governor Ronald Reagan’s “former secretary of business and

transportation,” Frank Walton, who began work on June 9, 1975 (Edwards, 1998, para. 65). Walton was able to more than double Heritage’s annual budget, from \$413,497 for 1974 just before he came aboard to slightly above \$1 million in 1976 (Edwards, 1998, para. 65). \$420,000 of that million came from a single funder, Richard Mellon Scaife, who would go on to contribute “at least \$3.8 million” “over the next eight years” beginning with 1973 (Micklethwait and Wooldridge, 2004, p. 78). James also actively used direct mail fundraising (Edwards, 1998, para. 67). “Individual donations, many of them in the \$25 to \$50 range, have accounted for as much as 40 percent of its annual budget, in marked contrast with the more traditional policy research organizations” (Smith, 1991, p. 200). Heritage grew at a blistering pace in the 1970s.

One of Heritage Foundation’s founders, Ed Feulner, resigned as executive director of the House Republican Study Committee to assume the presidency of the foundation in 1977 (Smith, 1991, p. 200), a tenure that would last until the present day. In the first year and a half of his presidency, Feulner succeeded in raising its annual budget from \$1 million to \$2.8 million (Judis, 2000, p. 126). Feulner was not only able to lure foundations like Smith Richardson and Olin, but also Fortune 500 corporations like General Motors, Chase Manhattan, Pfizer, Mobil, and Sears, and major foundations like Nobel (Judis, 2000, p. 126).

AEI had undergone a major resuscitation during the 1970s and remained larger than Heritage. As the decade drew to a close, AEI had 45 full-time researchers (Micklethwait and Wooldridge, 2004, p. 77). By 1980, its annual income was \$9.7 million, “\$500,000 more than Brookings” (Micklethwait and Wooldridge, 2004, p. 77). The counterestablishment had arrived.

After leaving the Heritage Foundation, Weyrich’s Committee for the Survival of a Free Congress succeeded in bringing a number of radical right-wingers into Congress in 1978, including the future Speaker of the House and a major architect of the right’s rise to power, Newt Gingrich. Weyrich’s remarkable organizational successes kept coming throughout the 1970s. In 1979, he told Jerry Falwell “Out there is what one might call a moral majority.” Falwell replied “That’s it. That’s the name of the organization” (Grann, 1997, para. 14).

Thus the Moral Majority was created, uniting movement conservatives and elements of the corporate elite with evangelical Christians, felling “the greatest track of virgin timber on the political landscape” (Grann, 1997, 14) and also contributing to the decline of mainstream American Christianity’s traditional affiliation with the “social gospel” exemplified by such people as Dorothy Day, Daniel Berrigan, William Sloane Coffin, and Dr. Martin Luther King, Jr.

In 1971, past president of the American Bar Association, conservative Democrat Lewis Powell, a 64 year old Richmond, Virginia corporate lawyer who sat on 11 corporate boards drafted a 6,000 word confidential memo for the U.S. Chamber of Commerce which argued passionately against *The Attack on the Free Enterprise System*. It was written at the request of his friend, neighbor, COC education committee chairman, and “head of the Southern Department Stores chain,” Eugene B. Sydnor, Jr. (Anderson, 1972a, p. F7).

Powell used alarmist language to outline the threat faced by business from many sectors of society in the early 1970s, to lambaste the apathy of business for not fighting back, and to offer a comprehensive and systematic plan on how to regain its stature, possibly under the guidance of a central nationwide coordinating body like the COC. This initiative would monitor and infiltrate schools and the academy, evaluate textbooks, and develop a staff of highly-respected pro-business scholars and speakers, encouraging them and allied intellectuals to publish and lecture often. Media outlets such as television, radio, the press, academic journals, books, paperbacks, and pamphlets should be monitored and used to disseminate pro-business messages. Business should even develop their own media, emulate the political achievements of labor, and systematically build support in the judiciary and other key political arenas as well.

The stridency and thoroughness of Powell’s proposal was due to what he perceived as the extreme gravity of the situation. Nothing less than the very “survival of what we call the free enterprise system” was at stake and, with it, any hope for “the strength and prosperity of America and the freedom of our people” (Powell, 2004, para. 38). Indeed, “no thoughtful person can question that the American economic system is under broad attack (Powell, 2004, para. 10).

Powell granted that “there always have been critics of the system” but that this criticism was “wholesome and constructive” so long as it took a reformist bent and didn’t question any of the bedrock assumptions of American capitalism (Powell, 2004, para. 11). To Powell’s mind, however, the criticism of the late 1960s and early 1970s sought to “subvert or destroy” the system (Powell, 2004, para. 11). What is worse, this subversion was no longer “sporadic or isolated” from a “few extremists”; instead it was “broadly based,” “consistently pursued” and came “from perfectly respectable elements of society: from the college campus, the pulpit, the media, the intellectual and literary journals, the arts and sciences, and from politicians” (Powell, 2004, para. 12, 14). Television was particularly to blame for giving these voices a platform (Powell, 2004, para. 15). Such “respectable elements” were even more likely to “fatally weaken

or destroy the system” than the handful of celebrity activists of the New Left mentioned by name in the brief (Powell, 2004, para. 21). While the left’s critique may stem from “political demagoguery or economic illiteracy,” that can only be considered “of slight comfort” because its potential damage to the free market system remained so grave (Powell, 2004, para. 29).

Powell then chided the business elite, “the boards of directors and the top executives of corporations great and small and business organizations at all levels” for what he perceived as their “appeasement, ineptitude and ignoring the problem” (Powell, 2004, para. 31). Their defense must be along the lines of “guerrilla warfare with those who propagandize against the system,” against those who try “insidiously and constantly to sabotage it” (Powell, 2004, para. 32).

But to truly be effective this warfare had to be fought collectively and in close coordination, which required “organization,” “careful long-range planning and implementation,” and “consistency of action over an indefinite period of years, in the scale of financing available only through joint effort, and in the political power available only through united action and national organizations” (Powell, 2004, para. 41). Powell suggested the COC might be the ideal body to provide that coordinating function, perhaps in conjunction with “other national organizations (especially those of various industrial and commercial groups)” (Powell, 2004, para. 43).

Powell was especially sensitive to the political function of education and blamed the academy’s long experience with liberalism for that ideology’s pernicious and powerful influence on society. He also noted that the gradualism of its onset over decades mitigated against notice of it by the business elite (Powell, 2004, para. 45-46). He suggested that ideological “balance” was lacking in the academy, with few conservatives or moderates to speak for their side, which allowed the incessant creation of anti-business cadres among graduates, who would then march out into those sectors of society that are particularly influential in the ongoing battle of ideas: “the news media, especially television,” “government,” “politics,” arts and letters, and education at various levels (Powell, 2004, para. 47, 49). Especially pernicious is when “these ‘intellectuals’ end up in regulatory agencies or governmental departments with large authority over the business system they do not believe in” (Powell, 2004, para. 50).

While Powell admitted that the principle of academic freedom is “sanctified” and that “it would be fatal to attack this as a principle,” he nevertheless saw appeals to rectify the alleged lack of ideological balance as “a great opportunity for constructive action” (Powell, 2004, para.

51). He suggested the Chamber of Commerce might also want to consider bypassing the university system to create its own “staff of highly qualified scholars in the social sciences who do believe in the system,” much like conservative think tanks would do during the 1970s and beyond (Powell, 2004, para. 53). A “speakers bureau” composed of the “ablest and most effective advocates from the top echelons of American business” might be an effective strategy as well, much like the Business Roundtable, Achieve, Inc., and individual business leaders would do in the 1980s and beyond (Powell, 2004, para. 54).

The ideological infrastructure should not only tout the values of American corporatist democracy, but also point out “its basic relationship to individual rights and freedoms” in a way that improves on “existing textbooks,” which are typically “superficial, biased and unfair” (Powell, 2004, para. 57). The overall action program for creating a stronger conservative presence in education would be

a long road and not one for the fainthearted. But if pursued with integrity and conviction it could lead to a strengthening of both academic freedom on the campus and of the values which have made America the most productive of all societies (Powell, 2004, para. 66).

This sense of being in it for the long haul permeated similar injunctions from the other major architects of the right’s dream of creating a counter-establishment, the perception that they were engaged in a multi-decade task of working through the universities, the schools, the media, and independently created intellectual venues.

Powell opined in 1971 that “business has been the favorite whipping-boy of many politicians for many years” (Powell, 2004, para. 81) and that business has less influence on government than almost any other sector in American society, particularly when it comes to lobbying before Congress (Powell, 2004, para. 83). To counteract this, business has to learn the lessons of methodical collective action already used by “labor and other self-interest groups...that political power is necessary,” “must be assiduously cultivated,” “used aggressively and with determination - without embarrassment and without the reluctance which has been so characteristic of American business - to penalize politically those who oppose it” (Powell, 2004, para. 87, 94).

As a part of this holistic program, Powell opined that the Supreme Court and judiciary “may be the most important instrument for social, economic and political change” (Powell, 2004,

para. 89). Shareholders, which he estimated to number around 20 million, may be another source of strength as well, those who have provided “the capital which fuels the economic system which has produced the highest standard of living in all history” (Powell, 2004, para. 10).

He closed his action plan on an ominous note: “business and the enterprise system are in deep trouble, and the hour is late” (Powell, 2004, para. 114). After delivering the memo dated August 31, 1971 to his friend Eugene Sydnor, Powell and Sydnor traveled together to Washington to brief COC executive vice president Arch Booth on the issues contained in the memo (Phillips-Fein, 2009, p. 161; Landay, 2002, para. 16). The COC published it in its periodical, *Washington Report* (Brock, 2004, p. 39).

Powell was nominated to the Supreme Court by President Nixon on December 9, 1971 and confirmed on January 7, 1972 (Supreme Court Historical Society, para. 1). Sydnor thanked his friend with a note saying it was an “excellent presentation of the vitally important cause for American Business to go on the offensive after such a long period of inaction and indecision in telling the American people the facts of life as they unhappily exist today” (Phillips-Fein, 2009, pp. 160-161).

The document circulated among the legal departments of such corporations as General Motors, where Powell’s “law school friend, Ross L. Malone” served as general counsel (Landay, 2002, para. 15) and DuPont, the executive suites of other leading American corporations (Phillips-Fein, 2009, p. 161-162), and among prominent movement conservatives and free market intellectuals.

Although the COC ultimately decided to pass on Powell’s ambitious and potentially costly call to action, others were less hesitant (Landay, 2002, para. 31). It “influenced or inspired the creation of the Heritage Foundation, the Manhattan Institute, the Cato Institute, Citizens for a Sound Economy, Accuracy in Academe, and other powerful organizations” (Powell, 2004, para. 3).

This was in part because major conservative funders fell under its thrall as well. Joseph Coors is on record as saying that his reaction to the Powell memo was a major impetus for him to involve himself deeply in conservative politics; it “‘stirred’ him up and convinced him American business was ‘ignoring’ a crisis” (Edwards, 1998, para. 45-46). John Olin wrote to AEI’s president William Baroody that “the Powell memorandum gives us a reason for a well organized effort to re-establish the validity and importance of the American free enterprise system” (cited

in Phillips-Fein, 2009, p. 162). One of the early pro-business litigation centers, the Pacific Legal Foundation, formed in 1973 (Grossman, 1993, para. 6), “quoted the Powell memorandum at length in its prospectus” (Phillips-Fein, 2009, p. 162). In 1975, an overarching National Legal Center for the Public Interest was created “to assist in the establishment of independent regional litigation foundations dedicated to a balanced view of the role of law in achieving economic and social progress” (cited in Grossman, 1993, para. 6). This organization would go on to help create six comparable organizations scattered throughout the country, funded by “the Olin, Scaife, Bradley, and Smith Richardson Foundations” (Grossman, 1993, para. 7).

Washington Post investigative reporter Jack Anderson made the Powell memo public in two stories on September 28 and 29, 1972. In the first column, he called it “a militant political action program” that was “now being circulated among top executives by the U.S. Chamber of Commerce” (Anderson, 1972a, p. F7). Anderson quoted from it extensively and noted that “the FBI failed to turn up [the memo] during its field investigation of Powell,” which prevented Senators during the confirmation process from asking him “whether he might use his position on the Supreme Court to put his ideas into practice and to influence the court in behalf of business interests” (Anderson, 1972a, p. F7). This was especially important as the use of the judiciary to counteract the legal ramifications of anti-business sentiment was given such a prominent role in the memo. Powell, who had also served on the Virginia Board of Education and as a trustee of Washington and Lee University, was equally keen that business “mold pro-business attitudes at the high school and college level” (Anderson, 1972a, p. F7).

The *New York Times* story the next day followed Anderson’s general pattern of a combination of synopsis and quotation (Graham, 1972, p. 31). Like Anderson, the *New York Times* piece noted that Powell was not questioned closely during the Senate confirmation hearings on his views towards business. Anderson’s second piece mused aloud that Powell’s “views were so militant that it raises a question about his fitness to decide any case involving business interests” (Anderson, 1972b, p. C27). He also characterized it as “a blueprint for an assault by big business on its critics” (Anderson, 1972b, p. C27).

Ironically, the publicity generated by the Anderson columns gave the memorandum widespread publicity and increased support for its ideas (Landay, 2002, para. 54). For many in the business community, the memo seemed to capture their zeitgeist perfectly, their sense of being under siege, while also serving as a stirring call to arms and savvy plan for comprehensive

action. The Chamber of Commerce was soon “besieged” by businessmen requesting copies (Landay, 2002, para. 54)

The most effective business lobbying effort of the decade, however, didn’t come from such established organizations as the Chamber of Commerce or National Association of Manufacturers but rather from a new entity, the Business Roundtable. The origins of the Business Roundtable can be found in three precursor business groups, the Labor Law Study Group, Construction Users Anti-Inflation Roundtable, and March Group. The Labor Law Study Group was founded “in 1965 by executives of General Electric and American Smelting and Refining to combat organized labor’s attempt to repeal section 14(b) of the Taft-Hartley Act” (Bowman, 1996, p. 354). The Construction Users Anti-Inflation Roundtable was a group of “one hundred steel and construction companies” formed in 1969 at the behest of U.S. Steel president Roger Blough “to pressure unions to hold down their wage demands” (Judis, 2000, p. 120). Roundtable (Bowman, 1996, p. 354). The March Group was a select group of executives concerned about what they took to be the declining influence of business on federal government policies. They were assembled over the course of late 1971 and early 1972 by John Harper, chairman of the Aluminum Company of America (ALCOA), and Fred Borch, the chairman of General Electric, (Judis, 2000, p. 121).

The movement towards the unification of these three groups was facilitated by a high-powered meeting in 1972 in Washington between Borch, Harper, “Secretary of the Treasury John Connally, Deputy Treasury Secretary Charls Walker, and Federal Reserve Board Chairman Arthur Burns” (Judis, 2000, p. 120-121). During the meeting, they discussed “the growing hostility towards business” in society at large in which the government officials urged the corporate “executives to found a new organization that would lobby Congress and the White House directly” (Judis, 2000, p. 121).

In 1972, the Labor Law Study Group and Construction Users Anti-Inflation Roundtable two organizations united to form the Business Roundtable. In 1973, the March Group agreed to join as well.

Very early in the life of the new organization, a consultant’s report “gave a prominent place to the Powell memorandum,” chided the founders for not “taking Powell’s comments seriously enough,” and called on them to engage in a “total attack program” to defend the

prerogatives and stature of big business (Phillips-Fein, 2009, p. 193). The Powell memo was attached as an appendix.

The Business Roundtable grew rapidly, even though it restricted its membership to CEOs of Fortune 500 companies. After its first five years of existence, it already had “192 member companies, including 113 of the top Fortune 200” (Judis, 2000, p. 121). Cumulatively, they accounted for “nearly half of the country’s GDP” (Judis, 2000, p. 121). Its first presidents were such captains of industry as Harper, “Thomas Murphy of General Motors, Irving Shapiro of Dupont, and Borch’s successor at GE, Reginald Jones” (Judis, 2000, p. 121).

The Business Roundtable differed from such prominent groups as the Committee on Economic Development in that it was not a research organization that sought to alter policy through publications but rather through direct lobbying of government officials. Their “discreet lobbying helped to defeat the liberal legislative agenda for the decade” (Phillips-Fein, 2009, p. 198). Among their most successful efforts during that period were opposition to “a consumer protection agency, labor law reform, and new antitrust legislation” and support for “corporate tax cuts and natural-gas price deregulation” (Himmelstein, 1989, p. 140).

The Business Roundtable also differed from business membership organizations like the Chamber of Commerce and National Association of Manufacturers in a number of salient ways. While the Business Roundtable limited its membership to the CEOs of Fortune 500 companies, the other two organizations have traditionally represented a significant number of small- and medium-sized businesses, in addition to serving corporations at the commanding heights of the economy. Secondly, BR lobbying was conducted by the CEOs and chairmen themselves, rather than staff members or professional lobbyists. Finally, the BR’s approach to lobbying tended to be more flexible and pragmatic than that of the “practical conservatives” at Chamber of Commerce and National Association of Manufacturers, and often found its greatest successes with Democrats, beginning with the Carter administration.

This began a decades-long withdrawal by the Democratic party away from the equity and social justice concerns of progressives. For example, in his January 19, 1978 *State of the Union* address, Carter said that

we really need to realize that there is a limit to the role and the function of government.

Government cannot solve our problems, it can't set our goals, it cannot define our vision.

Government cannot eliminate poverty or provide a bountiful economy or reduce inflation

or save our cities or cure illiteracy or provide energy. And government cannot mandate goodness (Carter, 1978, para. 19).

According to a brief introduction to the Powell memo on the Reclaimdemocracy.org website, in 1978 Powell penned “the majority opinion in *Bank of Boston v. Bellotti*, a...decision that asserted a First Amendment ‘right’ for corporations to influence ballot questions,” a decision that played a significant role in moving the Democrats to the right by increasing the importance of fundraising in Congressional and Presidential politics (cited in Powell, 2004, para. 6).

In recent decades, the Powell memo has come to occupy an almost canonical status in histories on the rise of the right in America. Some, in particular former Senator Bill Bradley aide Schmitt (2005), have sought to downplay its influence, in part because it is not mentioned in many of the most definitive volumes on the recent rise of the right: “Lee Edwards’ *The Conservative Revolution*, James A. Smith’s *The Idea Brokers*, Sidney Blumenthal’s *The Rise of the Counterestablishment*, Godfrey Hodgson’s *A World Turned Right-Side Up*, or George Nash’s authoritative *The Conservative Intellectual Movement in America Since 1945*” (Schmitt, 2005, para. 7). Schmitt goes on to suggest a genealogy of the rise of the importance of the Powell memo, offering the Alliance for Justice’s 1993 report of the right’s infiltration of the legal system, *Justice for Sale*, as the leading candidate for rediscovery of the Powell memo after decades of neglect (Schmitt, 2005, para. 8; Grossman, 1993). This article gave particular attention to Powell’s call for the active use of the courts by business and conservatives and how this injunction eventually led to the creation of a variety of pro-business litigation centers across the nation. Schmitt suggests this trend was furthered by Judis’ *The Paradox of American Democracy* (2000), which credited “Powell with convincing businessmen that they should be more politically active” (Schmitt, 2005, para. 9). Schmitt goes on to mention a reference to the Powell memo in Micklethwait and Woolbridge (2004) based on an account in the authorized history of the Heritage Foundation (Edwards, 1998). Schmitt suggests that “the most breathlessly detailed account of the Powell memo,” however, is to be found in Landay (2002), an essay he nominates as “probably the source of most of the recent interest in the memo” (Schmitt, 2005, para. 10).

The memo was also called a “major feature in a PowerPoint presentation on the Conservative Message Machine” (Schmitt, 2005, para. 4). Although Schmitt doesn’t mention him by name, the author and impresario of this presentation was Rob Stein, a former Clinton

deputy director of the Department of Commerce and former “senior advisor to the chairman of the Democratic National Committee” (Lapham, 2004, para. 8). After leaving political life, Stein became a hedge fund manager and began showing his PowerPoint presentation to elite big-money donors in the Democratic party during this last decade, in an attempt to replicate the messaging achievements of the right by creating a new organization, the Democracy Alliance (DeParle, 2005, para. 7). Stein’s presentation also seems to have been a major impetus goading Lapham into penning his essay *Tentacles of Rage, The Republican Propaganda Mill, A Brief History* (2004). Stein noted that fifty funding organizations had pumped “roughly \$3 billion over a period of thirty years” to anti-liberal causes (cited in Lapham, 2004, para. 9).

In the rest of his account, however, Schmitt is less persuasive. True, many of the leading figures of the rise of the modern right and its union with the corporate elite did not explicitly use the Powell memo as their plan of action. True, the memo focuses on the COC, who ultimately did not play the leadership role Powell had hoped. Less true, perhaps, is Schmitt’s assertion that the memo seems to be “much more of a call for the mainstream establishment to defend itself against critics from the further left” (Schmitt, 2005, para. 13). As I have argued above, the “mainstream establishment” at the time was largely “liberal.” It is probably true, however, that the audience Powell hoped to address would probably identify themselves as moderate conservatives.

In spite of Schmitt’s cautionary note, the importance of the memo seems hard to overstate, especially because of its influence on key figures, funders, and organizations central to the rise of the modern right and the fact that its blueprint for the rise of the modern right was largely followed. While the prime movers may not have always been acting specifically under the direct influence of the memo itself, many important ones often were. In spite of it all, the memo still provides a succinct and comprehensive outline of how the modern right came to power. It also played a significant role in the formation of the Heritage Foundation, BR, and organizations, many of which would go on to become major exponents of standards-based education. Even Schmitt himself admits, “some of Powell’s recommendations do bear an uncanny resemblance to the institutions of the modern right” (Schmitt, 2005, para. 11).

To be sure, Powell’s was not the only important memo of the era for the right. In 1970 (Grann, 1997, para. 11), Pat Buchanan, an aide to Nixon aide H.R. Haldeman, had made “himself the White House expert on how the liberal beast operated” through close study of

“Brookings and other tax-exempt institutions” (Smith, 1991, p. 197). In 1971, Buchanan, drafted a blueprint to combat liberalism that was remarkably similar to the Powell memo (Edwards, 1998, para. 22). It was presented to Nixon within days of his reelection, and reflected a strategy “to make permanent the New Majority” (cited in Edwards, 1998, para. 22). This missive called for a “conservative counterpart to Brookings” (Grann, 1997, para. 11), a think tank that could act as a

‘repository of its political beliefs’ ...a ‘talent bank’ for Republicans when in office, a ‘tax-exempt refuge’ for them when out of office, and a ‘communications center’ for Republican thinkers across the nation. ‘The AEI is not the answer’ (cited in Smith, 1991, p. 197).

Schmitt sees the Buchanan memo as having “foreseen the political and institutional structures of the right” (2005, para. 14). As the Powell memo was not the only important memo to contain the types of thoughts and recommendations it did, so too were Feulner and Weyrich not the only ones to suggest and implement the organizational strategies needed to carry out those ideas. While they may have been among leading lights of the new right, they had other counterparts in the corporate and political worlds as well. Judis (2000) singles out three prominent lobbyists and politicians in particular. These are “Bryce Harlow, Proctor and Gamble’s chief representative in Washington and an eminence grise among Washington lobbyists,” “Nixon’s Secretary of Defense Melvin Laird,” a Goldwater Republican and influential figure in the conservative takeover of the Republican party, and “Deputy Secretary of the Treasury Charles Walker,” who later would go on to “become Washington’s most powerful tax lobbyist” (Judis, 2000, p. 119).

As Feulner and Weyrich not the only ones to suggest and implement new organizational strategies, so too was Powell not the only impresario of ideas along these lines. Here, we should add Irving Kristol and William Simon as well, although their influence would arguably not peak until the latter part of the 1970s.

Kristol was “a former leftist and Trotskyist who had become a columnist for the *Wall Street Journal*, the editor of a new journal, *The Public Interest*, and a professor of public policy at New York University” (Judis, 2000, p. 116). He saw restraint of corporate power by such things as consumer and environmental protection laws as leading America implacably towards “state capitalism,” which he saw as a “huge potential threat to the individual liberties Americans

have traditionally enjoyed” (Kristol, 1978, p. 22). His many writings created so much of the intellectual framework of the neoconservative movement, that he is often described as one of its “godfathers.” While Kristol may not have been a very original thinker, he was a gifted proselytizer who understood the power of ideas and, according to Lapham (2004), also possessed of a significant amount of personal charm. Indeed, as Kristol has written, “what rules the world is ideas, because ideas define the way reality is perceived” (Kristol, 1978, p. 140).

Simon served as Treasury Secretary under President Ford and then went on to succeed John Olin as the head of the Olin Foundation in 1977. His influential 1978 book *A Time for Truth* reiterated many of the themes that animated Powell, Buchanan, Weyrich, Feulner, Harlow, Laird, Walker, and Kristol. In an oft-repeated passage, he wrote of the pressing need for funds generated by business [to] rush by multimillions to the aid of liberty, in the many places where it is beleaguered. Foundations imbued with the philosophy of freedom...must take pains to funnel desperately needed funds to scholars, social scientists, writers and journalists who understand the relationship between political and economic liberty” (Simon, 1978, p. 230).

Simon’s message of extreme urgency and his passionate identification of capitalism with individual freedom was remarkably similar to that of Powell’s. Elsewhere in his book, Simon called for

a massive and unprecedented mobilization of the moral, intellectual and financial resources which reside in those who still have faith in the human individual, who believe in his right to maximum responsible liberty and who are concerned that our traditional free enterprise system, which offers the greatest scope for the exercise of our freedom, is in dire and perhaps ultimate peril (1978, p. 229).

Kristol made a similar point in his essay *On Corporate Philanthropy* (1978). “When you give away your stockholders’ money, your philanthropy must serve the longer-term interests of the corporation. Corporate philanthropy should not be, and cannot be, disinterested” (Kristol, 1978, p. 144).

The COC and another national business organization of long standing, NAM, had both become moribund by the close of the 1960s. Beginning with the 1970s, however, both entities were enjoying a renaissance and had even began to collaborate on a number of measures, very much in the spirit of collective action urged by the Powell memo (Judis, 2000, p. 120).

During the 1970s, with the newly created Heritage Foundation on its right flank, the AEI was able to reposition itself as the bastion of mainstream conservatism and engineer a significant increase of revenue and the proliferation of prestigious contacts and fellowships throughout the decade. The young upstart, Heritage, also saw its revenue increase rapidly throughout the decade as well. Both organizations would send dozens of staffers to the incoming Reagan administration and the Heritage Foundation's magisterial *Mandate for Leadership* (1981) would serve as a detailed policy guide for the incoming president's team (Greenberg, 1998, para. 5; Judis, 2000, p. 125).

The powerhouse of American business lobbying during the 1970s, the BR, was also influenced by the message of the Powell memo, with one of its earliest consultants appending it to a report which urged the new organization to go on a "total attack program." After a decade of legislative accomplishments, by 1980, their membership included "the 10 largest corporations in the... Fortune 500 list - Exxon, General Motors, Mobil, Ford, Texaco, Standard Oil of California, Gulf, IBM, General Electric, and Standard Oil (Indiana)" as well as "21 of the top 25; 40 of the top 50... 70 of the top 100... 113 of the top 200; and 131 of the top 500" as well as the top public utilities, commercial banks, life insurance companies, retailers, and transportation companies (McQuaid, 1981, p. 115).

The cumulative effective of all of this targeted funding, intellectual labor, and policy engagement was to "set a counter-movement in motion to replace the institutions and expunge the ideas of American liberalism" (Landay, 2002, para. 6). This was accomplished by creating "an institutional infrastructure and ideological apparatus to produce its own intellectuals, disseminate ideas, and eventually control most of the commanding heights and institutions in which knowledge is produced, circulated and legitimated" (Giroux, 2009, para. 2). Often times, however, these appeals were as much to emotion, to "people's deeper feelings and values," as to reason, in part by "using messaging" created on the assembly lines of "marketing, public relations, and corporate image-management" (Johnson D., 2003, para. 18).

This chapter demonstrated, during the late 1960s and early 1970s, the corporate elite and movement conservatives collaborated closely on the creation of a multi-faceted intellectual, policy, and legal framework of think tanks, academic posts, media outlets, litigation centers, and other related initiatives. By the time of Reagan's inauguration in 1981, these "assembly lines were working at full capacity" (Lapham, 2004, para. 19). Indeed, they helped to generate the

numerous reports during the Reagan-Bush years that framed the terms of the educational policy debate, often in ways conducive to the ongoing evolution of standards-based education. This is because the major change agents of this period were so successful in framing the terms of the national debate (Callahan, 1999, para. 3). Or, as Schattschneider put it more succinctly, “whoever decides what the game is about also decides who gets into the game” (cited in Callahan, 1999, para. 2). This chapter helped explain who got into the game.

CHAPTER 6. A NATION AT RISK AND A DECADE OF REPORTS (1980S-1990S)

Milton Friedman has a famous quote on the relationship between crisis, ideology, and change, and the role of the intellectual class in mediating between the three.

Only a crisis—actual or perceived—produces real change. When that crisis occurs, the actions that are taken depend on the ideas that are lying around. That, I believe, is our basic function: to develop alternatives to existing policies, to keep them alive and available until the politically impossible becomes politically inevitable (1982, p. ix).

This chapter is in large part the story of a concerted effort by think tanks, governmental agencies, and blue-ribbon commissions to establish a voluminous rhetorical infrastructure that both kept the seed ideas of standards-based education “alive and available” and fomented the sense of crisis that lead to their eventual “inevitability.”

This chapter hopes to gauge the impact of *A Nation at Risk* and a plethora of other influential reports circulating in the educational policy debate of the 1980s and early 1990s, to examine how they prepared the way for standards-based education to emerge as one of the most influential American K-12 education reform ideas in following decades. Briefs from national business organizations like the U.S. Chamber of Commerce, National Association of Manufacturers, Committee for Economic Development, and – especially - the Business Roundtable set the parameters of the policy agenda and delineated many of its key terms. Dynamic figures from the national corporate elite also helped to propagate this rhetoric in the mainstream media. The efforts of the Minnesota, California, and Hawai‘i state Business Roundtables were extremely important precursors in the political adoption of many of these ideas at the state level. In addition to their work, a select group of energetic governors also helped shape the policy talk of the era.

The National Governors Association and Business Roundtable each held different annual meetings dedicated exclusively to education during the 1980s, in 1985 (Alexander, 1986) and 1989 (Emery, 2002) respectively. Both conferences helped consolidate the ideas that would later coalesce into standards-based education. The first national educational summit, held in Charlottesville in 1989, promulgated a number of national educational goals. This could be considered the first tentative iteration of the standards-based education reform idea, codified a few months after in Bush’s 1990 State of the Union address, which will be discussed later in this

chapter. Subsequent reports, like the famous *Secretary's Commission on Achieving Necessary Skills* (SCANS) report (United States Department of Labor, 1991), would soon become influential in the actual concrete drafting of initial state standards, another historical episode I will investigate at greater length later in this chapter.

These developments need to be seen in their economic and political contexts as well. With the appointment of Paul Volcker to head the Federal Reserve in August 1979 and the election of Ronald Reagan to the presidency in November 1980, the liberal consensus that had dominated American politics and economic policy since the Great Depression began to disintegrate. The ideological infrastructure cultivated by a loose coalition of New Right movement conservatives, corporate elites, evangelical Christians, and nascent New Democrats started to bear fruit. After a decade of assiduous labor, the counter-establishment was poised to become the establishment. The supply-side economics of the Chicago School enjoyed a new vogue. Government spending on social welfare programs was reduced. The wealthy enjoyed tax cuts. Military spending was enhanced. The influence of organized labor declined. As a cardinal example of this, one need look no further than Reagan's decertification of the Professional Air Traffic Controllers Organization union after their 1981 strike, "one of the most important events in late twentieth century U.S. labor history" (Arnesen, 2007, pp. 1123-1126). Many formerly public functions also began to be privatized. Economic policy shifted away from the governmental spending and "pump priming" favored by acolytes of John Maynard Keynes towards the all-pervasive faith in the markets professed by Milton Friedman and economists of the Chicago School.

Reagan campaigned hard on one of the conservative articles of faith, famously pledging to "get government off the backs of the American people." One specific way he promised to do so was by eliminating the federal Department of Education, which had just been created by the Carter administration. After assuming the presidency, however, Reagan didn't attempt to dissolve the agency. Instead, he appointed Terrel Bell to lead it. In August 1981, Bell appointed David Gardner, president of the University of California, to chair an 18 member blue ribbon panel representing "the geographic, racial, and ethnic diversity of the country" to look into the state of American education (Bell, 1993, p. 593). Agreeing to serve were two other university presidents, "a Nobel Prize winner, a distinguished corporate executive, two local school board presidents (including the president of the National School Boards Association), and a variety of other prominent educators"

(Bell, 1993, p. 593).

The report was released on April 26, 1983 during a ceremony held at the White House. President Reagan thanked the commissioners for a report that endorsed campaign trail staples like school prayer, vouchers, and the elimination of the federal Department of Education “when in fact it did none of these things” (Ansary, 2007, para. 13). As one commissioner, Gerald Holton, put it: “The one important reader of the report has apparently not read it at all” (Ansary, 2007, para. 13).

Small matter. The report turned out to be a bombshell nonetheless, gaining a level of media notoriety accorded to few federal reports before or since. Its emotional and highly wrought language clearly struck a chord with the media and the public. While there had been previous studies linking educational achievement with a healthy economy (U.S. Chamber of Commerce, 1982) none had the impact of *A Nation at Risk*, arguably the single most influential education policy document of all time.

Part of its appeal may perhaps be found in the sensational claims it made. The foundations of our society were being eroded by “a rising tide of mediocrity that threatens our very future as a Nation and a people” (National Commission on Excellence in Education, 1983, para. 2).

The damage being done to America’s global economic competitiveness by this “rising tide of mediocrity” was one of the central recurring themes of the report. In fact, one of the first sentences of the report read: “Our Nation is at risk. Our once unchallenged preeminence in commerce, industry, science, and technological innovation is being overtaken by competitors throughout the world” (National Commission on Excellence in Education, 1983, para. 2).

Recognition of the rapidly changing nature of the international economy was implicit in statements of this sort, changes which have come to be known as globalization, neoliberalism, the Washington Rules/Washington consensus, Bretton Woods II or any number of other labels one can give these developments. This new phase of global capitalism was made possible by advances in high technology (particularly computers and telecommunications), and characterized by the proliferation of transnational corporations, increasingly integrated international trade, direct foreign investment, the accelerating movement of capital across national borders, supply chains that stretched around the globe, and the proliferation of labor outsourced abroad.

Even though globalization was just starting to emerge when *A Nation at Risk* came out, the brief could already say with accuracy that “the world is indeed one global village,” in which America retained only a “slim competitive edge” in the markets of an increasingly

interdependent world economy (National Commission on Excellence in Education, 1983, para. 8). It was losing preeminence in such key manufacturing sectors as automobiles (to Japan), steel (to the South Korea), and machine tools (to Germany) (National Commission on Excellence in Education, 1983, para. 9). These powerful new competitors were “determined, well-educated, and strongly motivated” and well suited to take advantage of a “steady 15-year decline in industrial productivity, as one great American industry after another [fell] to world competition” (National Commission on Excellence in Education, 1983, para. 8, 40).

The report is clear on the central place of knowledge in this new phase of global capitalism. “Learning is the indispensable investment required for success in the information age we are entering... Education is one of the chief engines of a society’s material well-being” (National Commission on Excellence in Education, 1983, para. 8, 39).

Much of the report’s rhetorical power came from alarmist language linking educational achievement with global economic competitiveness. Another source was how it placed its call for education reform securely within the framework of national security. In an oft-quoted passage from the second paragraph, the report noted that

If an unfriendly foreign power had attempted to impose on America the mediocre educational performance that exists today, we might well have viewed it as an act of war... We have, in effect, been committing an act of unthinking, unilateral educational disarmament (National Commission on Excellence in Education, 1983, para. 2).

The report also offered prescriptive measures to address the issues it raised. In them, we can begin to see the elements that would later coalesce into standards-based education. In the findings section, this was even more explicit. There, the report strongly criticized secondary school coursework as “homogenized, diluted, and diffused to the point that they no longer have a central purpose,” creating a “cafeteria style curriculum in which the appetizers and desserts can easily be mistaken for main courses” (National Commission on Excellence in Education, 1983, pp. 16-17). This could be considered as a nascent plea for what would later come to be known as content standards. In the same section, expectations are defined as “the level of knowledge, abilities, and skills school and college graduates should possess” which allow students to “demonstrate their mastery of subject matter” and “tell students which subjects are most important” (National Commission on Excellence in Education, 1983, p. 17). This could be seen

as a nascent plea for what would later come to be known as performance standards. Indeed, the report mentioned the word “standards” on numerous occasions. “We should expect schools to have genuinely high standards rather than minimum ones” (National Commission on Excellence in Education, 1983, para. 26). Or, later in the report:

In contrast to the ideal of the Learning Society, however, we find that for too many people education means doing the minimum work necessary for the moment, then coasting through life on what may have been learned in its first quarter. But this should not surprise us because we tend to express our educational standards and expectations largely in terms of "minimum requirements." And where there should be a coherent continuum of learning, we have none, but instead an often incoherent, outdated patchwork quilt (National Commission on Excellence in Education, 1983, para. 29).

Although the word “standards” is used here in the everyday sense as “high expectations,” as the decade wore on, it gradually began to take on the technical sense familiar to educational professionals today.

Throughout the 1980s, the majority of business involvement in education was limited to relatively small-scale, community-based, ad hoc initiatives like “adopt a school” and CEO “principal for a day” type arrangements. By that time, schools were also beginning to experiment with management techniques imported from business, such as performance-based contracting, zero based budgeting, management by objectives, program planning based budgeting, and total quality management. These techniques were all predicated on the establishment of standards or goals beforehand and evaluating performance based upon these, usually through the use of quantitative data. These are some of the salient characteristics that would soon become central to standards-based education.

More important than specific management techniques imported from business, or identification of elements of standards-based education in embryo in *A Nation at Risk*, was the role the report played as a clarion call. It reconceptualized education’s purpose as one primarily of halting America’s declining international economic competitiveness. It also changed the nature of the participation of business in schools. Instead of the one-off projects mentioned above or the adaptation of specific business management techniques, business began a concerted, conscious, often collective effort to frame the debate by issuing a flurry of reports centered

around crisis rhetoric, emanating from an interwoven group of corporate leaders, academics, and think tank analysts (Barnhardt, 2000). These individuals were

overwhelmingly white, male and very often exceedingly affluent and well connected.

Many are directors and chairs of large multinational corporations - Ford, AT&T, Chase Manhattan, Mellon Bank, Digital Computers, to name a few. A number also sit on the boards of organizations like the Council for Economic Development, Council on Foreign Relations, Trilateral Commission, and the Conference Board (Slaughter, 1985, p. 218).

In a phrase: the power elite. Many early reports focusing on comparing and contrasting America's educational system with those of competitors abroad, typically found America wanting. An early warning from the National Science Board in 1983 came in the form of a report called *Educating Americans for the 21st Century* (National Science Board, 1983). Alarmed by declining enrollment in science and math classes and declining test scores in these subjects, the report urged that "by 1995, the Nation must provide, for all its youth, a level of mathematics, science and technology education that is the finest in the world, without sacrificing the American birthright of personal choice, equity and opportunity" (National Science Board, 1983, p. v).

Many other key reports from this period came from a select group of individuals who shuttled easily between government, academia, think tanks, foundations, and elsewhere; a bipartisan issue from the start. In fact, top leadership at the Business Roundtable noted that they tended to do better on specific issues with Democratic administrations than Republican ones. This trend was accelerated with Al From's creation of the Democratic Leadership Council in 1985 and the rise of the New Democrats. Left and right were united by the ideology of human capital and global economic competitiveness.

After the National Commission on Excellence in Education issued its report, it solicited feedback in a number of different "National Forums on Excellence in Education" held across the country. Two important reports were entered into the public record at the National Forum on Excellence in Education in held in Indianapolis on December 6-8, 1983. One was that of Jim Campbell (1983), "chairman of the United States Chamber of Commerce's Education, Employment and Training Committee." Another was that of Paul Peterson (1983) for the Twentieth Century Fund's Task Force on Federal Elementary and Secondary Education Policy, *Making the Grade*.

The U.S. Chamber of Commerce's 1982 report *American Education: An Economic Issue*

marked one of the first times the business community had come together in a collaborative effort concerning schools. The study said Japanese industry was more productive because their education system was better.

Campbell's talk on December 8, 1983 reiterated much of the previous report. It mentioned that the Chamber of Commerce had an active education policy committee since the 1960s and that its members had long been involved in educational matters in a variety of ways. He claimed the chamber's interest in education stemmed from the fact that the United States was "facing severe shortages of skilled workers" and "unprecedented international competition" (Campbell, 1983, pp. 3-4). In the same section where Campbell decried the coming skills shortage he also admitted that many new jobs will be "service-oriented" and won't "require traditional four-year college degrees but rather...the kind of education, training, and retraining available through the vocational and career education programs of the public school system" (Campbell, 1983, p. 3).

The Twentieth Century Fund "is an independent research foundation that undertakes economic, political, and social policy studies" (Brookings Institution, 2011, ¶ 9). Their Task Force on Federal Elementary and Secondary Education Policy included "prominent leaders in higher education and public school administration" (Presseisen, 1985, p. 44). Like many other reports of the period, *Making the Grade* claimed to be motivated by "an unusual sense of urgency" and urged the creation of an adequate pool of "skilled and capable individuals without whom we cannot sustain a complex and competitive economy" (Peterson, 1983, p. 3). Although the report didn't utilize the nomenclature of standards per se, it did urge the development of literacy in spoken and written English, as well as higher order skills like "reasoning, critical analysis" and facility with "complex ideas," all of which can be said to impose an implicit set of standards (Peterson, 1983, p. 11). *Making the Grade* saw an enhanced federal role to carry this out, one as important as "national leadership in health, agriculture, the physical sciences, and weaponry" (Peterson, 1983, p. 18).

Shortly after *A Nation at Risk* and the United States Chamber of Commerce and Twentieth Century Fund reports, the floodgates opened. Much of the literature that followed continued in the same vein, although dissenters arose early. For example, Albrecht noted that "the fascination of the public and the media with *A Nation at Risk* has created another problem: it has blunted and obscured the carefully researched, thoughtful, and imaginative reports of Ernest Boyer, John Goodlad, and TheodoreSizer" (1984, p. 684). Furthermore, "the nationalistic

rhetoric of the report makes deliberate and thoughtful consideration of its recommendations seem somehow unpatriotic” (Albrecht, 1984, p. 684). It also urged a cautionary note regarding the incessant call to action present in *A Nation at Risk*.

“History is not kind to idlers,” the commissioners tell us. Yet it seems to me that a more accurate reading of history clearly suggests that history is not kind to the impetuous, the irresponsible, and the unthinking. But action is what we're getting, though much of it, particularly from political bodies, is unquestionably harmful (Albrecht, 1984, p. 684)

Aronowitz and Giroux published *Education Under Siege* in 1985. In their revised edition of 1993, they opined that

In the current debate around the crisis of education and the role that federal policy should play in resolving it, U.S. society may be facing a dilemma that calls into question its very foundation as a democratic nation. There are hints of the magnitude of the crisis in the language of recent reports on public education and in the current assault on public education that has been waged by the Reagan/Bush administrations (Aronowitz and Giroux, 1993, p. 213).

In spite of these cautionary notes, the many reports issued from 1983 onward reiterated remarkably consistent themes. To some extent, this homogeneity was encouraged and cultivated by President Reagan. He called 1983-1984 the “National Year of Partnerships in Education” between “business, government agencies and communities” which would be coordinated, tellingly, by his “special assistant for private sector initiatives,” not the Department of Education (McKenzie and Cromer, 1984, p. 133). Other early documents included those from the Business-Higher Education Forum, the Education Commission of the States’ Task Force on Education for Economic Growth, and the College Board. More would follow throughout the decade.

The Business-Higher Education Forum was “a group representing corporate and university chief executives” (Rich and Devitis, 1992, pp. 60). At the behest of President Reagan (Slaughter, 1985, p. 219), they charged themselves in 1982 with exploring “ways in which our national competitive position could be further strengthened through increased innovation and productivity” (Anderson and Saxon, 1983, p. vii). The report they generated, *America’s Competitive Challenge*, was funded in part by the Andrew W. Mellon and National Science Foundations (Slaughter, 1985, p. 219). It urged the formulation of a coordinated national strategy to improve education, ongoing technical innovation, the wise use of capital, and enhanced

cooperation between business and the academy as the cornerstones of renewed American economic competitiveness (Passow, 1984, p. 679). Signatories to the report including such leading lights of business and academia as

John F. Burlingame of General Electric, Philip Caldwell of Ford, Robert Anderson of Rockwell International, James E. Olson of AT&T...Derek Bok of Harvard, David Saxon of the University of California, Richard Cyert of Carnegie-Mellon, and Matina Horner of Radcliffe (Slaughter, 1985, p. 220).

As might be expected from an organization led by captains of industry, they adopted rhetoric comparable to the Powell memo. They demanded fealty to the economy above all other sectors of society, as well as ongoing perception management to cultivate this disposition among the general population.

As a nation, we must develop a consensus that industrial competitiveness is crucial to our social and economic well being. Such a consensus will require a shift in public attitudes about national priorities, as well as changes in public perceptions about the nature of our economic malaise (Anderson and Saxon, 1983, p. 2).

They even went further than most reports of the period in their defense of the free enterprise system. They argued strongly against “protectionism, national economic planning, income redistribution and plant closing restrictions” as “counterproductive and un-American” (Slaughter, 1985, p. 221). Certainly, plant closings due to management decisions to outsource labor on the part of big business were precisely those actions that contributed to a withering of the American manufacturing base. These corporate decisions gave the lie to the supposed imperative of these reports, that of fostering high skill jobs for the high tech economy.

The Education Commission of the States was an entity created by state governments to help them engage in educational policy advocacy at the national level. Their Task Force on Education for Economic Growth was composed of a “range of leaders: governors, legislators, corporate chief executives, state and local school board members, educators, leaders of labor, the scientific community, and many others” (Hunt, 1983a, p. 14). Under the leadership of North Carolina Governor James Hunt, the task force drafted *Action for Excellence*.

After an opening paean to America’s supposed infatuation with “newness” and “progress,” the report raised the usual specters of economic competition from abroad, particularly Japan and West Germany, who may soon “outstrip us in inventiveness and productivity,” a development

that “is suddenly troubling Americans” because of its ominous implications for “economic competition in a global arena” which “will be even more intense tomorrow” (Hunt, 1983b, p. 14-15).

Hunt’s task force urged the Education Commission of the States to help foster the creation of similar task forces at the state and local levels to conduct needs assessments, facilitate school improvement, and encourage “close partnerships between education, business, and government” (Rich and Devitis, 1992, pp. 60). “A real emergency is upon us; a conviction that we must act now, individually and together, and a passionate optimistic conviction that action, soon enough and in the right direction, can succeed” (Hunt, 1983b, p. 14).

Elsewhere, the rhetoric was similarly urgent: “There are few national efforts that can legitimately be called crucial to our national survival. Improving education in America – improving it sufficiently and improving it now – is such an effort” (Hunt, 1984, p. 11). Hunt underscored the imperative for concrete action: “We have had an abundance of research, a plentiful supply of analysis and an impressive piling up of reports. Public concern is rising. What we need now is action: action for excellence” (Hunt, 1984, p. 11).

Hunt’s task force was funded “by 15 leading corporations and foundations, including Aetna Life & Casualty Insurance Foundation, AT&T, Control Data, Dow Chemical, Xerox, Texas Instruments, RCA, Ford Motor Company, and IBM” (Spring, 1998, p. 151). With such backing, it may not be surprising that the report urged business to take a more active role in “setting goals for education in America. If the business community gets more involved in both the design and delivery of education, we are going to become more competitive as an economy” (Hunt, 1983b, p. 18).

The College Board is a membership organization which then consisted “of more than 2,500 colleges, schools, school systems and educational organizations” and was “concerned about the vast number of high school graduates inadequately prepared for college” (College Board, 1983, p. 1). As a result of this concern, they drafted a report entitled *Academic Preparation for College: What Students Need to Know and Be Able to Do* which, among other things, “provided a framework for curricula that outlines, and provides justification for, the knowledge and skills students need to get the most out of college education” (College Board, 1983, p.1). This type of terminology and these types of objectives foreshadowed standards-based education. It also referred to the need for balance between quality and equality, demonstrating a

lingering attachment to the traditional value of equity so prevalent during the 1960s and 1970s, slowly being supplanted by a heightened emphasis on quality (College Board, 1983, p. 2).

The report also recommended “Basic Academic Competencies” in the “Basic Academic Subjects” of “English, Arts, Mathematics, Science, Social Studies, and Foreign Language” (College Board, 1983, p. 3). These competencies for the college-ready student were formatted as a list of approximately 5-10 skills. Objectives listed under “basic academic subjects” resemble what would later come to be known as “content” standards; what a student should know. For example, the mathematic recommendations were as follows.

The Basic Academic Subjects

Mathematics

- ◆ The ability to apply mathematical techniques in the solution of real-life problems and to recognize when to apply those techniques.
- ◆ Familiarity with the language, notation, and deductive nature of mathematics and the ability to express quantitative ideas with precision.
- ◆ The ability to use computers and calculators.
- ◆ Familiarity with the basic concepts of statistics and statistical reasoning.
- ◆ Knowledge in considerable depth and detail of algebra, geometry, and functions.
- ◆ More specifically, college entrants will need the following preparation in mathematics.

Similarly, the objectives listed under “Basic Academic Competencies” resemble what would later come to be known as “performance” standards; what demonstrates adequate mastery.

Again, for mathematics, these are:

Basic Mathematics-Related Academic Competencies

Mathematics

- ◆ The ability to perform, with reasonable accuracy, the computations of addition, subtraction, multiplication, and division using natural numbers, fractions, decimals, and integers.
- ◆ The ability to make and use measurements in both traditional and metric units.
- ◆ The ability to use effectively the mathematics of: integers, fractions, and decimals; ratios, proportions, and percentages; roots and powers; algebra; geometry.
- ◆ The ability to make estimates and approximations, and to judge the reasonableness of a result.

- ♦ The ability to formulate and solve a problem in mathematical terms.
- ♦ The ability to select and use appropriate approaches and tools in solving problems (mental computation, trial and error, paper-and-pencil techniques, calculator, and computer).
- ♦ The ability to use elementary concepts of probability and statistics (College Board, 1983, pp. 3-4)

Other business groups released comparable reports in the years that followed, in which one can see the contours of standards-based education emerging. The Committee for Economic Development, that beacon of the Keynesian accommodation between big business, government, and organized labor in the post-war era, that entity which overshadowed the American Enterprise Association for decades, issued *Investing in Our Children: Business and the Public School* in 1985. It was the result of “an investment of hundreds of thousands of dollars” and two years of effort by “the nation's most prominent business leaders and university presidents” (Doyle and Levine, 1985, p. 114). These included

Owen Butler, chairman of Procter & Gamble...Ralph Lazarus, head of Federated Department Stores; Ronald Davenport, head of Sheridan Broadcasting; James W McKee, Jr., head of CPC International Corporation; and Donna Shalala, president of Hunter College. The presidents of Johns Hopkins University, Spelman College, the Florida State University System, and the New York University System all served on the subcommittee. Corporate involvement was no less distinguished; IBM, Lucky Stores, CBS, ARA Services, 3M, Whitney Communications, Phillips Petroleum, Bankers Trust, and R. J. Reynolds were all represented (Doyle and Levine, 1985, p. 114).

Similarly, it was funded by

the Ford Foundation, the Edna McConnell Clark Foundation, the Exxon Education Foundation, the Procter & Gamble Fund, Metropolitan Life, the William and Flora Hewlett Foundation, R. J. Reynolds Industries, Inc., the John M. Olin Foundation, Inc., the Atlantic Richfield Foundation, Northrop Corporation, the Pfizer Foundation, Inc., Standard Oil Company (Ohio), the Phillips Petroleum Foundation, Inc., and the Hospital Corporation of America (Doyle and Levine, 1985, p. 118).

The finished product was by and large the work by David Doyle (director of educational policy studies at the American Enterprise Institute) and Marsha Levine (a consultant there), who had

“co-directed the Committee for Economic Development's study of business and the schools” for two years (Doyle and Levine, 1983, p. 113). The study was publicized by “widespread media reports and an aggressive dissemination program” which made it “known to most U.S. educators” (Doyle and Levine, 1983, p. 113). The report asserted that “economic productivity and the quality of education cannot be separated” (Doyle and Levine, 1983, p. 114). It also asserted that “education has a direct impact on employment, productivity, and growth, and on the nation's ability to compete in the world economy. Therefore, we cannot fail to respond” (Are we there yet, 2002, ¶ 4).

Four of the reports issued during the 1980s focused on teacher training, certification, and professionalization. Three of these were from Carnegie foundations: *A Nation Prepared: Teachers for the 21st Century* (Carnegie Forum on Education and the Economy, 1986), *A National Board for Teaching? In Search of a Bold Standard* (Shulman and Sykes, 1986), and *The Condition of Teaching: A State Analysis* (Carnegie Foundation for the Advancement of Teaching, 1988). The other major teacher training policy brief of the period was *Tomorrow's Teachers: A Report of the Holmes Group* (1986). Much of the findings of these four reports were predicated on notions similar to standards: creating hierarchical structures better able to utilize the technocratic tweaks of experts, even as they claimed to be flattening out hierarchies in the middle and lower levels of management (Popkewitz, 1991, p. 146). They largely promoted an ideology of guild craft modeled after law and medicine.

These reports were peppered with the same gloomy assessments that had become the norm. *A Nation Prepared* said that graduates couldn't do the “increasingly complex work required of them” (Carnegie Forum on Education and the Economy, 1986, p. 15). *A Nation Prepared* also reiterated a theme common to many of the reports of the 1980s, coping with the enhanced use of technology in the workplace.

A heavily technology-based economy will be unable to invest vast sums to maintain people who cannot contribute to the nation's productivity. American businesses already spend billions of dollars a year retraining people who arrive at the workplace with inadequate education (Carnegie Forum on Education and the Economy, 1986, p. 20).

Throughout much of the 19th century, men were well represented in the teaching profession. With the rise of academic schools of education and the differentiation of school administration as an occupation distinct from teaching around the turn of the 20th century the

teaching corps soon became primarily female. By the 1960s and 1970s, academically well-prepared women, the pool from which teachers had traditionally been drawn from for much of the 20th century, were beginning to enter more remunerative professions like business, law, and medicine in ever greater numbers. This left academically less prepared women to fill teaching positions, making teaching during much of the 1970s and 1980s what some have called “the profession of last resort.” This made it vulnerable to calls for “professionalization,” especially when these initiatives also had the support of both major teacher unions, the American Federation of Teachers and National Education Association.

The Carnegie Foundation for Education and the Economy even went so far as to establish a National Board for Professional Teaching Standards in 1988. It was composed of “63 members including teachers (the majority), school administrators, local board members, governors (past and present), teacher educators, children's advocates, and business leaders,” with the foundation committed to funding it to the tune of \$5 million over five years (National Governors' Association, 1988a, p. 1; National Governors' Association, 1988b). Standards were beginning to be applied to the teaching profession as well as to academic subjects. The National Board for Professional Teaching Standards continues to exist, offering a rigorous and well-respected national certification for excellence in teaching practice. Many states have programs that subsidize teachers' participation in this program. Hawai'i, a state whose experience with standards-based education will be examined closely as a case study in a later chapter, is one such state.

Most of the studies in the 1980s which revolved around reform of the teaching corps used the professions of law and medicine as their templates, especially around the concepts of guild certification and guild control. Many of these studies also urged greater autonomy for teachers, albeit to reach educational goals set by technocrats outside of and above the classroom. This is the essence of an industrial management technique which might be termed “control from a distance,” a notion which would later become central to standards-based education, an “industrial metaphor” which “has several associated beliefs:”

that people are lazy by nature and need specific direction, close management, and material incentives to work most efficiently; that teachers are just like other workers; that schools are just like any other plant or work place that need to be organized for maximum efficiency; that school administration should be hierarchical and patriarchic; that

administrators should be separate from, and superior in authority to, teachers; and that the outcomes of school can be measured, and the measures could be used to compare schools and teachers. The achievement products could thus be related in straightforward ways to costs, and therefore to efficiency (Smith, Miller-Kahn, Heinecke, & Jarvis, 2004, p. 195).

Business associations and business-oriented think tanks closed out the decade with a large number of reports. These included the Hudson Institute's *Workforce 2000: Work and Workers for the Twenty-First Century* (1987), National Center for Education and the Economy's *America's Choice, High Skills or Low Wages* (1990), Educational Testing Service's *From School to Work, Policy Information Report* (Barton, 1990), National Alliance of Business' *A Blueprint for Business on Restructuring Education* (1989) and *Education: The Next Battleground for Corporate Survival, An Urgent Message from Twenty-One Harvard Business School Students* (1990), Business Roundtable's *The Role of Business in Education Reform: Blueprint for Action; Report of the Business Roundtable Ad Hoc Committee on Education* (1988), *Essential Components of a Successful Education System: The Business Roundtable Education Public Policy Agenda* (1989a), *Business Means Business About Education. A Synopsis of the Business Roundtable Companies' Education Partnerships* (1989b), and *The Business Role in State Education Reform* (Fosler, 1990) a National Alliance of Business-Business Roundtable collaboration, *The Business Roundtable Participation Guide* (1991), Heritage Foundation's *A Businessman's Guide to the Education Reform Debate* (1990), and Conference Board's *Business Leadership: The Third Wave of Education Reform* (1989) and *Corporate Support of National Education Goals, Report No. 978*. (Berenbeim, 1991).

Many of these reports can be characterized as "how to" manuals to help top corporate executives engage with the educational policy reform process, typically at the state and local levels, both logistically and in arming them with the appropriate rhetoric. Or, in the case of an entire special edition of *Fortune* dedicated to corporate involvement in education reform, mass media mythologizations of this engagement in process (Fortune, 1990; Morrison, 1990).

Although these reports covered a variety of topics, methods, and rhetoric, almost all mentioned curriculum reform at some point, an injunction that would soon morph into standards-based education. After the National Alliance of Business released their reports mentioned above, from then on they let the Business Roundtable take the lead as the main source of formal,

collective business engagement in education reform during this crucial period when the contours of standards-based education began to emerge.

“In 1987, Hudson’s landmark study *Workforce 2000* accurately forecasted the changes the American workforce would encounter with the new millennium” (*Hudson Institute history*, 2010, para. 4) and became a significant influence on the many “school-to-work” and “workforce development” initiatives that soon began to proliferate at local, state, and federal levels in the years to come.

America’s Choice, High Skills or Low Wages contained the usual doom-and-gloom rhetoric that had become commonplace. “America is headed toward an economic cliff” because so much of the economic growth in America during the 1970s and 1980s was generated by a larger percentage of American adults who were working, most notably the large amounts of women who had recently entered the workforce (National Center for Education and the Economy, 1990, p. 21). The authors of the report felt that this percentage had probably peaked. Therefore, future economic growth and global economic competitiveness would largely be dependent upon enhanced productivity. “The key to maintaining, to say nothing of improving, our standard of living is productivity – more products and services from every member of the workforce” (National Center for Education and the Economy, 1990, p. 14).

To generate this enhanced productivity, the report recommended improving what may be called the “worst school-to-work transition system of any advanced industrial country” by embracing “the third industrial revolution now taking place in the world,” one based on “the advent of the computer, high speed communication and universal education,” by creating a “national system capable of setting high academic standards” and assessment centered around the attainment of a “Certificate of Initial Mastery” by “age 16, or shortly thereafter” (National Center for Education and the Economy, 1990, pp. 14-15, 17-18). Attainment of this certificate would then track students towards college, work, or further technical or professional training (National Center for Education and the Economy, 1990, p. 18). Ideally, this new system would facilitate the creation of “high performance work organizations,” supposedly a key feature of the third industrial revolution.

The Educational Testing Service’s report *From School to Work, Policy Information Report* (Barton, 1990), like many released during this period under the auspices of big business, was less concerned with standards per se than with enhancing linkages between what was taught

in schools and the job performance employers allegedly required from their employees. They also focused on prognostications regarding “shortages of skilled workers,” diverging “quality of life, income, and life prospects,” among various subgroups within America, and an increasingly “culturally diverse work force” (Atwater et al, 1991, p. 1). In suggesting what schools should teach, however, they foreshadowed language similar to what we would later find in content standards.

A Businessman’s Guide to the Education Reform Debate was one of the Heritage Foundation “backgrounders” their media- and politically-savvy president Edwin Feulner was so fond of, policy briefs that passed what he called the “briefcase test,” reports short and simple enough for a busy executive to be able to throw into their briefcase and read later (Rogalsky, 2007, para. 19). *A Businessman’s Guide to the Education Reform Debate* phrased its arguments in the “no nonsense” rhetoric so beloved by corporate executives.

American business understands well that the nation’s public schools are like a money-losing industrial giant that cannot produce a product that satisfies its customers. Leaders of America’s major companies understand too that the nation’s schools must improve if the United States is to remain competitive in world markets (Allen and McLaughlin, 1990, p. 2).

The Conference Board “is a global, independent business membership and research association working in the public interest” (*About Us*, 2010, para. 1). Their report *Business Leadership: The Third Wave of Education* summarized the proceedings of their 1989 meeting, a conclave featuring “talks by 16 leaders in business and education” and focused on “(1) the effect of institutionalization of educational policy and corporate organization on involvement in educational reform; and (2) the effect of business leadership in selected cities on education coalitions” (Ashwell and Caropreso, 1989, p. 1).

In addition to sponsoring the creation of influential reports, the engagement of business with education prospered at the local level as well. This can be seen in a number of collaborative, comprehensive, multi-party school-to-work initiatives, with the Boston Compact (announced during September 1982) being perhaps the most prominent (Ferrar and Cippollone, 1988).

Business influence was also growing at the federal level as well. Prominent federal government reports on education were strongly wedded to human capital theory, global competitiveness ideology, and crisis rhetoric (United States Department of Education, 1986,

1987; Department of Labor, 1989). Particularly influential was the report of the Secretary of Labor's Commission on Achieving Necessary Skills, the so-called SCANS report (Department of Labor, 1991), which many of the states used as their initial template in developing the first iterations of actual standards beginning in the 1990s.

The Commission said they wrote "as concerned representatives of the nation's schools, businesses, unions, and government" (United States Department of Labor, 1991, p. i). The number of executives from top American corporations, however, was striking. The global competitiveness ideology is established front and center, in the preface, the "letter to parents, employers, and educators."

For most of this century, as this nation took its goods and know-how to the world, America did not have to worry about competition from abroad... Today, the demands on business and workers are different. Firms must meet world class standards and so must workers (United States Department of Labor, 1991, p. i).

They also made some major assumptions about the nature of "a productive, full and satisfying life." Basically, in the judgment of the commission, this comes from salaried employment in a rapidly globalizing economy. "All American high school students must develop a new set of competencies and foundation skills if they are to enjoy a productive, full, and satisfying life" (United States Department of Labor, 1991, p. i). These "competencies and foundation skills" were what became so influential in subsequent years for the technical development of actual state standards documents, especially the focus on the "basic skills" of "reading, writing, arithmetic/mathematics, listening, and speaking," and in how closely they already aligned with traditional academic subject matters (United States Department of Labor, 1991, p. xi). This is not to imply a kind of classical Greek "seven arts" approach to learning, however. No. These and many other criteria were proposed to facilitate the adaptation of the student to the changing economy, a point the SCANS report was very consistent about. In fact, its general orientation was so closely oriented toward salaried work that its impact is as powerful in the history of the "school-to-work" model (arguably culminating in the School-to-Work Opportunities Act of 1994) as it is in the "standards-based education" model.

Numerous states used the SCANS report as a model document from which to develop their own state standards. Some states mentioned their debt to the SCANS report explicitly. Others may not have mentioned the report by name, but reiterated how they used the "basic

skills” and other organizing concepts found in the SCANS report. A Heritage Foundation backgrounder on the report identified a number of the states that found the report helpful: Florida, Texas, Michigan, New Hampshire, New Jersey, and Alaska (Miller, 2001, pp. 3-4)

Another example of business influence at the federal level was the privileged access to the White House’s Task Force on Regulatory Relief enjoyed by the Business Roundtable. This task force was one of the first entities created by President Reagan upon taking office. It was chaired by Bush since its inception in 1981. In one 1987 communication, the roundtable sent Bush a report suggesting the “EPA back off on restrictions to the disposal of nuclear waste, OSHA cease asking for regulations compelling construction firms to notify workers of exposure to hazardous substances, and Congress repeal fuel economy standards for cars,” all in the name of eliminating “major obstacles to international competitiveness” (Borman, Castanell and Gallagher, 1994, p. 73).

At first glance these requests may not seem to apply to education. Upon further reflection, however, their focus on “competitiveness” dovetails with the most important theme resounding throughout all of the many educational policy reform reports issued during the Reagan-Bush years. They also exemplify how “the corporation is an externalizing machine, in the same way that a shark is a killing machine” (Achbar and Abbott, 2004). The legal roots of this imperative can be seen in the landmark Michigan Supreme Court case *Dodge v. Ford Motor Company* (1919):

A business corporation is organized and carried on primarily for the profit of the stockholders. The powers of the directors are to be employed for that end. The discretion of directors is to be exercised in the choice of means to attain that end, and does not extend to a change in the end itself, to the reduction of profits, or to the nondistribution of profits among stockholders in order to devote them to other purposes” (1919, p. 8).

By the 1980s, this was a settled and central part of American corporate law. Any account of corporate involvement in education reform must be considered in this light, not merely as a means of externalizing their training costs, but as part of a larger agenda of externalizing as many different costs as possible.

In addition to work at the local and federal levels, the business community became proactive at the state level as well, most notably in Minnesota, California, and Hawai‘i. In all of these states, efforts were led by the state incarnations of the Business Roundtable and a

remarkably successful consulting firm, Berman Weiler Associates, which drafted all of the major reports in these states. A collaboration between “Roundtable CEOs” and “the reform movement” secured passage of a “major education bill, SB-813” in California in 1983 (Berman, 1988a, p. i). “Since then, student test scores have shown some improvement, standards have been raised, and morale in the schools appears to be stronger” (Berman, 1988a, p. i).

Building on these accomplishments, the California Business Roundtable rehired the same consulting firm they worked with on the legislative effort, Berman Weiler Associates (Berman, 1983). This time, the consultants were tasked with conducting a “gap analysis” of California educational needs, interviewing “a diverse array of stakeholder groups,” visiting schools, and distilling this data into a 296 page report entitled *Restructuring California Education: A Design for Public Education in the Twenty-First Century*. It was intended to “stimulate discussion and serve as one basis for Californians to agree on an agenda for change” and included all of the requisite references to “shifts to the information age and global competition” in “the passage to the 21st century” which will be “challenging, a time of both opportunities and difficulties” and require significant adaptation by the K-12 public education system (Berman, 1988a, p. i). In one of their key findings, they recommended reforms that contained salient aspects of standards-based education.

Rather than prescribing the educational process, the state should set performance goals for the system, measure how well schools are meeting those goals, [and] institute ways to hold schools accountable for performance (Berman, 1988a, p. ix).

In 1989, President Bush, who had campaigned wanting to be the “education president,” challenged the Business Roundtable to develop a coherent agenda for public education. Accepting this charge, the roundtable devoted their entire 1989 annual meeting to the topic. Building on the California and Minnesota reports from Berman Weiler Associates (sponsored by the California and Minnesota Business Roundtables), the national organization developed the first iteration of what would come to be known in many of their subsequent reports as the “essential components of a successful education system” (Business Roundtable, 1989a; Emery and Ohanian, 2004, p. 141, 148).

They centered around outcome-based accountability systems, a hallmark of standards-based education. They also codified the national Business Roundtable’s approach of urging state branches to use local contractors to study education reform and develop proposals for state

government. This was later distilled into a pamphlet entitled *The Role of Business in Education Reform: Blueprint for Action* (California Business Roundtable, 1988). At the 1989 meeting of the Business Roundtable, they agreed to a sustained, ten-year engagement with education reform (Emery and Ohanian, 2004, p. 35).

In their accommodation with America's long tradition of local control of education, the Business Roundtable made common cause with a powerful ally: the National Governors Association. Like the Business Roundtable, the National Governors Association had recently held an annual meeting dedicated exclusively to education, in 1986 at Hilton Head, South Carolina. There, they arrived at positions that foreshadowed the Business Roundtable's essential components of a successful education system (Borman, Castanell and Gallagher, 1994, p. 73).

South Carolina Governor Richard Riley played a central role in the deliberations of the National Governors Association (Riley, 1986). Later, as chairman of the "Commission for Educational Quality of the Southern Regional Education Board" he worked "to develop a set of 12 education goals" which predated the national education goals announced at the Charlottesville summit "by several months" (Lewis, 1993, p. 428). The National Governors Association also appointed Governors Bill Clinton and Carroll Campbell of Arkansas and South Carolina to co-chair a committee on education goals at this time.

The Business Roundtable and the National Governors Association also shared something else in common: ready access to President George H.W. Bush, who charged both to develop a coherent educational policy. The efforts of both organizations came to fruition with the famous Charlottesville summit. Perhaps sensing an opportune political climate, leading business organizations like

the Business Roundtable, the U.S. Chamber of Commerce, and the National Association of Manufacturers, established the Business Coalition for Education Reform to lobby for national achievement standards, improvements in the teaching profession, fairness in educational funding and other reforms (Borman, Castanell and Gallagher, 1994, p. 78). In addition to this partnership, the Business Roundtable also continued along their efforts, which proved to be more enduring and influential than those of the Business Coalition for Education Reform.

President Bush asked the National Governors Association to join him for an education summit at the University of Virginia in Charlottesville on September 27–28, 1989. The federal role in

education, usually relatively minor owing to a centuries-long tradition of local control, had been growing since the National Defense Education Act of 1958 and the other federal laws that followed. With the summit, the federal role was poised to grow much larger.

The summit was the first meeting called by a president with the governors for any purpose and was decidedly bipartisan. The National Governors Association's education task force co-chairs came from both major parties, as did the summit's working group, co-chaired by Republican and Democratic governors. The Democrats in Congress, however, were reluctant to cede their traditional leadership on the issue to the Republicans, the executive branch, and the governors. Their leadership may have also been miffed at being excluded from the summit. Days before the Charlottesville summit, Senate majority leader George Mitchell (D-ME) and House majority leader Richard Gephardt (D-MO) announced their own set of national education goals (Miller, 1989, para. 4). Among the proposed goals was

improving the performance of American students in mathematics, science, and foreign languages until it exceeds that of students from other industrialized nations, a clear commitment to subject matters usually considered crucial to global economic competitiveness (Miller, 1989, para. 15).

They also called for a broad-based conference to follow up on the work of the summit. Even for the Democratic Congressional leadership, business leaders would be among the key stakeholders at the conference (Miller, 1989, para. 11). By the end of the event, President George H.W. Bush and the nation's governors had agreed to set six national educational goals and create a bipartisan body to monitor progress in attaining them, the National Educational Goals Panel. "Astonishingly, no teachers, professional educators, cognitive scientists, or learning experts" were invited to help develop them (Ansary, 2007, para. 27).

As chair of the Education Commission of the States, co-chair of the National Governors Association education committee, and as governor in his own state of Arkansas, Bill Clinton played a leading role in the development of these policies (Ravitch, 2000, p. 432).

President George H.W. Bush and the Governors issued a joint statement, *A Jeffersonian Compact*, on September 28 1989. It called for national educational goals as a prerequisite for continued international economic competitiveness (Bush and the National Governors Association, 1989). Jefferson was such an avowed proponent of decentralized political power that he wondered:

what country can preserve its liberties, if its rulers are not warned from time to time, that this

people preserve the spirit of resistance? Let them take arms. The remedy is to set them right as to the facts, pardon and pacify them. What signify a few lives lost in a century or two? The tree of liberty must be refreshed from time to time, with the blood of patriots and tyrants. It is its natural manure (Jefferson, 1787, pp. 268-269).

Judging by such sentiments, he might not have appreciated an attempt to increase federal power in his name. A *Jeffersonian Compact* stated that

The President and the nation's Governors agree that a better educated citizenry is the key to the continued growth and prosperity of the United States...And as a Nation we must have an educated workforce, second to none, in order to succeed in an increasingly competitive world economy...We believe that the time has come, for the first time in U.S. history, to establish clear, national goals, goals that will make us internationally competitive (Bush and National Governors Association, 1989, para. 2-3).

"Successful restructuring efforts" would require "active, sustained parental, business, and community involvement" (Bush and National Governors Association, 1989, para. 27). The document also repeatedly mentioned the need for "accountability" as well. A few months later, President Bush announced these goals during his 1990 *State of the Union address*.

By the year 2000, every child must start ready to learn. The United States must increase the high school graduation rate to no less than 90 percent. And we are going to make sure our schools' diplomas mean something. In critical subjects, at fourth, eighth, and 12th grades, we must assess our students' performance. By the year 2000, U.S. students must be the first in the world in math and science achievement. Every adult must be a skilled, literate worker, and citizen. Every school must offer the kind of disciplined environment that makes it possible for our kids to learn. And every school in America must be drug free (Bush, 1990, para. 23-28).

The Conference Board, "an organization formed in 1916 to improve the business enterprise system and to enhance the contribution of business to society," surveyed 1,600 American businesses regarding their attitudes towards education reform, particularly their opinion of the six educational goals promulgated by the National Governors Association in 1990 (Walker, 1990) and what kind of commitments they might be willing to make to see them through (Borman, Castanell and Gallagher, 1994, p. 79). The 176 respondents were strongly in favor of workforce skills development and global economic competitiveness, with the latter being more important to larger firms with more than 50,000 employees (Borman, Castanell and

Gallagher, 1994, p. 79).

A Nation at Risk referenced many of the social benefits routinely ascribed to American education. It allows people to “participate fully in our national life” which is “essential to a free, democratic society,” and fosters “a common culture” (National Commission on Excellence in Education, 1983, para. 9). In fact, the authors say that the concern of the commission “goes well beyond matters such as industry and commerce. It also includes the intellectual, moral, and spiritual strengths of our people” (National Commission on Excellence in Education, 1983, para. 9). To address these concerns requires finding the right balance between “the twin goals of equity and high quality schooling” (National Commission on Excellence in Education, 1983, para. 26).

In spite of these allusions, a content analysis of the main body of the report (excluding the introduction, findings, and recommendations) can help the reader infer which goals the commission valued the most. For example, variations on the word “competition” (in the economic sense) are repeated five times. Comparably, “excellence” (not counting its usage in the proper name of the commission) is mentioned nine times. “Equity” and “equitable” are only mentioned one time each.

In the long-standing values debate between equity and quality, *A Nation at Risk* comes down firmly on the side of quality. It further alleges that “quality” education (mentioned three times) has been undermined by the

often conflicting demands we have placed on our Nation’s schools and colleges.

They are routinely called upon to provide solutions to personal, social, and political problems that the home and other institutions either will not or cannot resolve (National Commission on Excellence in Education, 1983, p. 8).

Considering the provenance of the report, with a conservative Republican administration that campaigned heavily on a limited role for the federal government, such a statement suggests the commissioners might be using the pursuit of “quality” as a means of dissolving the civil rights and social justice agenda that had become an embedded component of the “equity” and “equality” arguments. These assumptions had largely defined the debate since the 1954 Supreme Court decision of *Brown v. Board of Education of Topeka*.

The high public profile of the report and its preponderance of references to competition, excellence, and quality provided a lever that business was ready, willing, and able to take hold of

to use to shift the policy debate towards their interests, defining quality in terms advantageous to their fiscal bottom lines. The central purpose of this shift was allegedly to maintain America's global economic competitiveness in a rapidly changing world economy, an imperative which dominated the many reports that followed. Nevertheless, macro-structural economic changes solidified under the Reagan-Bush regime belie this claim and suggest other motivations might have been at work.

For example, much of the talk of global economic competitiveness centered around calls to renew America's global industrial competitiveness specifically. To be sure, throughout much of the post-war era, it had been possible for a single wage-earner in the manufacturing sector (often without a college degree) to provide his or her family with a middle-class lifestyle. On the other hand, manufacturing as a percentage of GDP peaked shortly after World War II and the service sector had come to dominate the economy since then.

Another key component of global economic competitiveness ideology involved workforce development for the "high skill, high wage" jobs of the "new economy" in the information age. Examined empirically, these jobs were never abundant and certainly never enough to base a national economy the size of America's on. The few such jobs that existed were decidedly scarcer after the technology bubble, which began in 1995 and crashed in 2000. Furthermore, many of these jobs were outsourced abroad (particularly to India) soon after they were created.

Throughout the Reagan-Bush years, the major national business organizations, the governors, and the executive branch collaborated on a reform agenda that was starting to resemble standards-based education as we know it today. The key agenda setters concurred: big business should set the agenda and frame the debate, according to their needs and based on the crisis rhetoric found in a decade of reports they themselves largely commissioned.

These reports often played upon middle class fears, ambitions, and norms: competition, individualism, acquisition, and "standards of living." In return for honoring these types of goals, the children of the middle class were told they would be among those selected for greater rewards in the vast sort and select mechanism that is American K-12 education (Spring, 1988). The travails of those unable or unwilling to subscribe to these standards was not considered, as this might question the legitimacy of the economic and educational systems (Slaughter, 1985, p. 222). This was to be avoided at all costs.

This chapter assessed the impact of *A Nation at Risk* and other influential reports issued during the 1980s and early 1990s by national business organizations such as the U.S. Chamber of Commerce, National Association of Manufacturers, Business Roundtable, and others. It also looked into how the rhetoric and actions of key governors and dynamic members of the national corporate elite helped pave the way for standards-based education to emerge as one of the leading K-12 education reform ideas in America.

CHAPTER 7 – FEDERAL EDUCATION POLICY CONFLICTS OVER STANDARDS-BASED EDUCATION DURING THE BUSH AND CLINTON YEARS (1988-2000)

How did standards-based education as we recognize it today come to be such an accepted and integral part of federal education policy, and what obstacles had to be overcome for this to occur? In this chapter, I will look at the role specific corporate leaders, governors, teacher union leaders, and others played in shepherding bills like *America 2000* (Bush, 1990, 1991; Chira, 1992; Kolb, 1998; Miller, 1991a,b,c,d; Miller, 1992a,b,c,d; National Council on Education, Standards, and Testing, 1993; Stedman, 1991; Stedman and Riddle, 1992; Tirozzi, 1991; United States Congress, 1991a; United States Department of Education 1991; Winfield and Woodward, 1992) and *Goals 2000* (A Goals 2000; Berlak, 1995; Clinton, 1993; Purpel, 1995; United States Congress, 1994a,b; United States Department of Education, 2005) through the legislative process, as well as the social and political contexts of this effort (Diegenmueller, 1995; Firestone, 1997; Jennings, 1998; Kosar, 2005; Resnick and Nolan, 1995; Standards: Struggling, 1995; Starr, 1998; Stoskopf, 2000; Thompson, 1999; Vinovskis, 1999a,b). In this chapter, I will also examine the “standards wars.” These controversies erupted after the initial promulgation of voluntary model national standards, especially in history (Cheney, 1994; Johnson and Diegenmueller, 1995; Morrison, 1996), language arts (International Reading Association, 1999; National Committee for Teaching English and International Reading Association, 1996), and mathematics. Paradoxically, at its moment of seeming triumph, the model was also at its most vulnerable, under heavy threat from parents, rank and file teachers, conservatives, and the religious right. Finally, I will investigate how proponents weathered this resistance so that by the time Clinton secured reauthorization of the Elementary and Secondary Education Act in 1996 (the *Improving America’s Schools Act*), standards had become an integral part of federal educational policy, with significant practical ramifications at the state and local levels.

The overall education reform policy talk of this period was often highly partisan. The “right” (Bennett, 1994; Doyle, 1991, 1993; Finn, 1993; Hirsch, 1996; Ravitch, 1995a,b) was wedded to the crisis rhetoric (Barnhardt, 2000; Wilson, 2005) in American education. Their design specifications for improvement were typically based on the assumptions of the bipartisan human capital literature of the period (Dertouzos, 1990; Lafer, 2002; Marshall and Tucker, 1992; Reich, 1991; Thurow, 1992). Some on the so-called left might not embrace such partisan labels.

They might instead assert they are merely correcting the misleading use of data by the “right.” The “left” camp argued that the crisis was largely manufactured. They also yearned for education to get back to its progressive roots by serving a diverse set of intellectual, affective, and social goals (Dewey, 1966; Berliner and Biddle, 1996; Bracey, 2000, 2004, 2007a,b; Schrag, 1997). As an example of the tension between these two camps, the “right” even referred to the “left” as “revisionists” (Stedman, 1994).

The case of the 1991 Sandia report, which saw no major crisis in American education, in many ways exemplifies this “left revisionist” perspective (Ansary, 2007; Bracey, 2007a,b; Huelskamp, 1993a,b; Miller, 1991e, 1992e; Project Censored, 1994; Ravitch, 2007; Schneider and Houston, 1993; United States Congress, 1991b). I will discuss this intriguing counterfactual at greater length later in the chapter.

The numerous national education summits led by specific corporate leaders (IBM’s Louis Gerstner in particular) often brought together the president and governors again. It has its own literature as well, often highlighting the efforts of particular top corporate executives (Archer and Walsh, 1996; Business Roundtable, 1992a,b, 1993, 1995, 1996, 1998, 1999, 2000a,b,c, 2001; Gerstner, 1994; Gerstner, Semerad and Doyle, 1995; Hammonds, 1999; Hill and Warner, 1994; Jossey-Bass, 2001; Mickelson, 1999, 2000; Otterbourg, 1997; PBS Frontline; Text of policy statement, 1996). Collectively, these efforts were instrumental in getting the wobbly reform model back on a firm footing.

When the National Governors Association convened on February 25, 1990 shortly after Bush’s State of Union address, they adopted a modified version of the six national education goals mentioned in his speech. They also called for 21 additional new objectives. Many of these dealt with the resources needed to achieve the original six goals, what were often called “opportunity-to-learn” standards. The modified version, later codified in law by *Goals 2000* stated that

1. All children in America will start school ready to learn.
2. The high school graduation rate will increase to at least 90 percent.
3. American students will leave grades four, eight, and twelve having demonstrated competency in challenging subject matter, including English, mathematics, science, history, and geography; and every school in America will ensure that all students learn to use their minds well, so they may be prepared for responsible citizenship, further learning, and productive employment in our modern economy.

4. U.S. students will be the first in the world in science and mathematics achievement.

5. Every adult American will be literate and will possess knowledge and skills necessary to compete in a global economy and exercise the rights and responsibilities of citizenship.

6. Every school in America will be free of drugs and violence and will offer a disciplined environment conducive to learning (Harnischfeger, 1995, p. 107).

In July 1990, the President and the National Governors Association established the National Education Goals Panel to create annual report cards on progress made towards the achievement of these goals, chaired by Governor Roy Romer of Colorado (National Education Goals Panel, 1993, 1996, 1997, 1998, 1999a, 1999b, 1999c). When speaking to the panel in 1991, President Bush said. “There are only a few moments in our lives when we are called upon to join a crusade, and I honestly believe this is one of them. We have a crisis in American education, and we’ve simply got to do something about it” (Bush, 1991, para. 4). Although national standards and assessments had not yet been established, they were anticipated by grades 4, 8, and 12 assessments of “critical subjects” President Bush called for and endorsed by the National Governors Association, particularly goal three with its call for “demonstrated competency” in “challenging subject matter, including English, mathematics, science, history and geography” (Bush, 1990. Para. 23-28; Harnischfeger, 1995, p. 107).

The work done at the Charlottesville education summit of 1989 and the National Governors Association meeting of 1990 laid the groundwork for an ambitious education improvement plan drafted by Bush’s secretary of education Lamar Alexander and the deputy secretary of education and former CEO of Xerox, David Kearns. The prominent right-wing education reform advocate, Chester Finn Jr., was also involved (Miller, 1991b, para. 3; Kolb, 1998, p.142; Finn, 1993, pp. 247–256, 263–266). This legislation was announced by President Bush on April 18, 1991 (United States Department of Education, 1991, p. 49). Called *America 2000*, it consisted of four main components:

[1] reform of existing schools through such initiatives as expanded school choice, voluntary national examinations, report cards on educational performance at all levels, and development of new standards for student performance;

[2] development with business sector support of New American Schools, which would be model schools created without concern for the current constraints that affect the structure and content of schooling;

[3] establishment of skill standards for the workforce and administration of diagnostic assessments to enhance workers' current skills; and

[4] designation of at least 535 communities as America 2000 Communities, selected because they embrace the education strategy and commit themselves to supporting a New American School (Stedman, 1991, p 4).

America 2000 called for the president and governors, in conjunction with the National Education Goals Panel, to set "New World Standards to be achieved in five core subject areas," and assess, report on, and incentivize progress towards these standards (Stedman, 1991, p. 7, 14). Under this plan, standards would be voluntary and drawn up by some entity other than the federal government. States and school districts could then utilize them as model documents to craft their own. Although it was unclear as to who would draft the initial standards, in announcing the new initiative President Bush suggested the governors would have a prominent role (United States Department of Education, 1991, p. 51).

Implementation of this ambitious plan - which President Bush called "a revolution more than a program" - quickly ran into political trouble. The right was more interested in school choice, and the left was still frustrated by conservative Republican moves that killed their preferred education reform bill in October 1990, the *Equity and Excellence in Education Implementation Act* (Kosar, 2005, p. 94). After *America 2000* was announced, Democrats offered a new education bill, S 2, which incorporated many of the elements of the previous *Equity and Excellence in Education Implementation Act*. What *America 2000* and S 2 shared was a codification of the six national education goals. S 2 and its counterpart in the House of Representatives, HR 3320 both failed to include education standards or incorporate much of *America 2000*. House hearings repeated the mainstream Democratic position that educational achievement was primarily a matter of the socio-economic status of students' families and the amount of resources available to schools, the long shadow of the Coleman Report being cast still (1966). This reiterated the old tension between equity and excellence that dominated much of the reform debate in the 1980s. For the Democrats, enhancing student achievement was primarily a matter of getting more money to schools.

Sensing an unfavorable political climate in Congress, the Bush administration tried to implement *America 2000* without legislation. They worked closely with the business community, who were asked to invest \$200 million in a "New American Schools Development Corporation." This attempt to circumvent Congress set up a turf battle between Congress and the executive branch. House Education

and Labor committee members testified to an appropriations committee that congressional approval would be needed to enact *America 2000* (Miller, 1991a, para. 1). Several months later, Congress put language in an education bill prohibiting the administration from using any funding to enact *America 2000's* proposals. As Secretary Alexander contended, "To be blunt about it, some members of Congress are afraid of a national exam" (Miller, 1991c, para. 11). The struggle for power continued in a different form with dueling proposals for the creation of a national education advisory group. Secretary Alexander had been attempting to establish such a group under the auspices of the National Education Goals Panel, one that would focus on national standards and assessments. House Democrats responded with legislation that would create a similar entity, albeit one with a higher proportion of Democratic representation and considerably less sympathetic to standards and testing.

The two branches of government were able to come to an understanding. On June 27, 1991, the Education Council Act was passed, creating the National Council on Education Standards and Testing, although Congressional Democrats remained suspicious of the very concept of standards. The act asked the council to examine "the desirability and feasibility of establishing national standards and testing in education," with a report due on December 31, 1991 (United States Congress, 1991a, pp. 2–3).

This compromise did not resolve the partisan debate. House hearings continued to document Democratic distaste for the substance of *America 2000*, in spite of support for the initiative from traditional Democratic allies like teacher unions heads Albert Shanker of the American Federation of Teachers and Keith Geiger of the National Education Association.

Since *A Nation At Risk* was released in 1983, there had been a clamor from government and business creating a sense of crisis in keeping with the crisis-response-solution dialectic. This succeeded in motivating a number of school reforms. Many states set up commissions similar to the National Commission on Excellence in Education, often with a strong business influence, such as the one set up in Texas in 1984 led by Ross Perot. Numerous governors made education a top gubernatorial priority, such as Bill Clinton of Arkansas, Lamar Alexander of Tennessee, Richard Riley of South Carolina, and Roy Rohmer of Colorado. Several state judiciaries penned rulings calling for more equitable local funding (notably Texas, New Jersey, and Kentucky). Site-based decision making became fashionable as well, in Hawai'i among other places (Bell, 1993, pp. 593, 595).

The crisis rhetoric sold well politically to be sure. Reagan Education Secretary Terrel Bell said it helped Reagan steal "the election issue from Walter Mondale" during the 1984

campaign “and it cost us nothing” (Ansary, 2007, para. 16). Ironically, Reagan, who campaigned on abolishing the Department of Education, wound up fostering a dramatically enhanced federal interest in education. This is a big part of what enabled George H.W. Bush to campaign as wanting to be the “education president”

Part of the political appeal was that fostering a sense of crisis had repercussions beyond education. Hammering on this theme, Bush Sr. and prominent Reagan era conservatives like Bill Bennett, Chester Finn, and Lamar Alexander aided by

business leaders like IBM chairman Lou Gerstner...gradually managed to convert not only the issue of economic equity but a whole range of liberally oriented children's issues - healthcare, welfare, nutrition, preschools, daycare, decent housing, recreational opportunities, inner-city youth and job programs - into a debate focused almost exclusively on tougher education standards and an emphasis on outcomes over resources (Schrag, 2000a, para. 5).

With Bush displaying a lackluster record in education when the election year of 1992 rolled around, having failed to pass *America 2000*, it allowed Clinton to campaign as a potentially more effective education president (Bell, 1993, p. 595).

To demonstrate how this crisis rhetoric was decisive in the consolidation of standards-based education, I would like to make a brief aside to focus on a little known report from the Sandia Laboratory in New Mexico. This is a compelling drama that even made Project Censored's number 3 slot in 1994 in their annual review of the top 25 items of “news that didn't make the news” in 1994 (Project Censored, 1994). Bush's Secretary of Energy, Admiral James Watkins, urged the federal scientific research laboratories “to become more involved in education” (Huelskamp, 1993a, p. 718). Long concerned with science, technology, engineering, and mathematics education, researchers at the Sandia laboratory took up Admiral Watkins' challenge after the 1989 Charlottesville summit and attempted “to provide an objective, outsider's look at U.S. education” (Huelskamp, 1993b, p. 4).

“The New Initiatives Department of Sandia's Strategic Studies Center [was] asked to conduct a wide-ranging analysis of local, state, and national education systems to determine where Sandia could make its most effective contribution” (Huelskamp, 1993a, p. 719). To their “surprise, on nearly every measure, [they] found steady or slightly improving trends,” albeit with important caveats.

First, it is not clear that all measures analyzed are appropriate barometers of performance for the education system; some may be irrelevant. Second, even if a measure is appropriate, steady or slightly improving performance may not be adequate to meet future societal requirements. Finally, on some appropriate measures, performance of the U.S. education system is clearly deficient (Huelskamp, 1993a, p. 719).

Their main findings were as follows: high school graduation rates had “remained steady for 20 years, hovering somewhere between 75% and 80%” (Huelskamp, 1993a, p. 719). When dropouts reentering the system and completing high school were accounted for, the rate for young adults rose to “85%,” a rate “still improving and among the world’s best,” although minority and urban youth non-completion rates remained high (Huelskamp, 1993a, p. 719). National Assessment of Educational Progress scores held steady or even improved. While average Scholastic Aptitude Test scores had “dropped since the 1960s,” this was due a massive influx of minority test takers, not “decreasing student performance” (Huelskamp, 1993a, p. 719). Still, “nearly 60% of today's young people pursue postsecondary studies at accredited institutions” and 25% of young people persist to a bachelors degree, the highest rate in the world (Huelskamp, 1993a, p. 719). Per pupil K-12 education spending had risen by 30% over the last 15 years, although here “special education and fixed costs such as insurance and retirement funds” were the primary drivers (Huelskamp, 1993a, p. 719). Per pupil spending rates were “about average” compared to the rest of the world (Huelskamp, 1993a, p. 719). The number of students earning natural science and engineering bachelors had reached approximately 200,000 per year, up drastically from 20 years ago and holding at approximately 4-5% of all bachelors earned. Foreign-born students were earning a substantial percentage of technical doctorates to be sure (50% in engineering and 25% in science) (Huelskamp, 1993a, p. 719). A little over half of them chose to remain in America. They “found little credible data” that supported negative international comparisons in student performance and degree attainment (Huelskamp, 1993a, p. 719). The U.S. led the world in the number of technical and non-technical degrees attained by women and minorities. “The overall technical degree attainment by the workforce is unparalleled in the world” (Huelskamp, 1993a, pp. 719-720).

-Between 1975 and 1988, average SAT scores went up or held steady for every student subgroup.

-Between 1977 and 1988, math proficiency among seventeen-year-olds improved slightly for whites, notably for minorities.

-Between 1971 and 1988, reading skills among all student subgroups held steady or improved.

-Between 1977 and 1988, in science, the number of seventeen-year-olds at or above basic competency levels stayed the same or improved slightly.

-Between 1970 and 1988, the number of twenty-two-year-old Americans with bachelor degrees increased every year; the United States led all developed nations in 1988 (Ansary, 2007, para. 47).

The Sandia report also contradicted the alleged “skills gap,” a major component in the general theme of declining international competitiveness.

Of late, much debate in education has focused on the system's inability to produce students with adequate "skills" for the work force. According to many, this deficiency is a primary cause for a decline in U.S. international economic competitiveness. However, our review of the limited research on the education and training practices of business found that very few companies offer training that is intended to compensate for inadequate academic preparation of new employees. Rather, the training focuses on such social "skills" as punctuality and personal appearance (Huelskamp, 1993a, p. 720).

As damning as these empirical findings were to the elite perception management program of the national business community and the national bipartisan political consensus which took its cues from them, even more so were the straightforward conclusions the researchers drew.

Implementation of a wide variety of initiatives

without proper coordination or a clear understanding of desired outcomes could result in little or no gain. American society has not clearly articulated the changes required to meet its future goals. In fact, we assert that forming a consensus on required changes may be the greatest challenge facing education today. However, national consensus is itself debatable. The U.S. education system was built on a combination of local control, state influence, and federal interest. The existence of over 15,000 independent school districts nationwide attests to this (Huelskamp, 1993a, p. 720).

The *Education Week* account drew a similar conclusion from the report. “Unfortunately, much of the current reform agenda, though well intentioned, is misguided...Based on a ‘crisis’ mentality, many proposed reforms do not properly focus on actual problems” (Miller, 1991e, para. 3).

This was not what the Bush administration wanted to hear, especially in the midst of a contentious battle with Congress over the passage of *America 2000* and under strong pressure from the far right pass some sort of national school voucher program. What happened next is open to debate and makes a fascinating case study of what can happen when so-called expertise-driven, pure, unbiased, and empirical research meets the politicized realm of actual policy-making.

The lead researcher of the Sandia report claimed that they put their preliminary findings out to peer review in early 1991 with “the U.S. Department of Education, the National Science Foundation, and other researchers (most notably Gerald Bracey)” (Huelskamp, 1993a, p. 719). Within weeks, they found themselves “swept up in the national debate on the status of education” (Huelskamp, 1993a, p. 719). Congressional Democrats knew the draft report was circulating on Capital Hill. Rumors of its suppression were rampant. The Democrats arranged for Huelskamp to testify before the Subcommittee on Elementary, Secondary, and Vocational Education of the Committee on Education and Labor of the House of Representatives on July 18, 1991 (Huelskamp, 1993a, p. 718). “We knew it was only a matter of time before their chain was jerked,” one Democratic committee aide said, “so we wanted to get them on record while we could” (Miller, 1991e, para. 26).

Diane Ravitch, then a key member of the conservative educational establishment and a long time proponent of standards-based education, had been appointed Assistant Secretary of Research for the U.S. Department of Education about six weeks before she first heard of the report. In spite of the dissatisfaction with it, the Department of Energy submitted it to the Department of Education. While she claims she had “no role in the evaluation,” her department’s “top professional research staff” found “the use of the data inadequate and unprofessional” (Ravitch, 2007, para. 5). After it became clear the Department of Energy had no intention of publishing the report, its authors spoke to a senator from their state of New Mexico, Republican Pete Dominici.

Dominici called for a meeting on September 24, 1991 (Miller, 1991e, para. 27) “and invited half a dozen other senior Republican senators” (Ravitch, 2007, para. 6). Ravitch attended

with “Deputy Secretary David Kearns, the former CEO of the Xerox Corporation, [who] had joined the U.S. Department of Education a few months earlier” (Ravitch, 2007, para. 6). Peggy Dufour, “the chief education adviser to Secretary of Energy James T. Watkins” was also in attendance (Miller, 1991e, para. 6, 27).

In a 2007 back-and-forth in the *Huffington Post*, Bracey and Ravitch offered dueling accounts of what transpired at that meeting. Bracey said Kearns told Huelskamp “You bury this or I’ll bury you” (Bracey, 2007a, para. 5). Ravitch denied it, saying Kearns was “probably the most civil person I have ever met” who never threatened anyone (Ravitch, 2007, para. 10). *Education Week* said “administration officials, particularly Mr. Kearns, reacted angrily at the meeting” (Miller, 1991e, para. 28).

In September 24, 1991, the *Albuquerque Journal* became the first daily newspaper organ to break the story in journalism. In a September 31 op-ed piece, Secretary of Energy Watkins excoriated the report (Miller, 1992d, para. 34). As more media attention was directed towards the saga, Ravitch took an increasingly active role in the media denouncing the report (Miller, 1992d, para. 35).

Peggy Dufour was outspoken in her criticism as well. She told *Education Week* in October 1991 that professional governmental reviews by the National Science Foundation and National Center for Education Statistics supported the Department of Energy’s position. In a particularly scathing assessment, National Science Foundation director of Policy Research and Analysis Peter W. House wrote that “the report rests on a partial and flawed analysis, which does not reflect a full understanding of relevant reported research; that the narrative does not constitute a cohesive analysis, and that the conclusions presented are not adequately supported” (Miller, 1991e, para. 21).

When asked to discuss it before a New Mexico legislative committee, Huelskamp declined. He wrote them to say that “due to recent events, my management has decided that my continued involvement in the educational arena is not in Sandia's best interest” (Miller, 1992d, para. 37).

Nevertheless, scholars continued to use the Sandia data. Both lead author Huelskamp and “Lee Bray, the Sandia vice president who had overseen the analysis” shared their material with Bracey (Bracey, 2007a, para. 3). Impressed, Bracey suggested to Huelskamp that they should publish the Sandia report and Bracey’s comparable research together in a single volume.

Huelskamp said “We can’t. We’ve got internal political problems” (Bracey, 2007a, para. 4). According to *Education Week*, “sources said the researchers had told them that they feared losing their federal funding if they spoke with reporters” (Miller, 1991e, para. 4). Other sources said the researchers “were told it would never see the light of day, that they had better be quiet. I fear for their careers” (Miller, 1991e, para. 9).

But academics continued to use it again and again. David Berliner cited it in a paper *Educational Reform in an Era of Disinformation* which “he presented at a meeting of the American Association of Colleges for Teacher Education in February, 1992” (Miller, 1992d, para. 29). Robert R. Rath, the executive director of the Northwest Regional Education Laboratory “used the report quite widely” in the area served by his organization, although he acknowledged “it’s clear that the political leadership in Washington doesn’t like this report and has tried to discredit it” (Miller, 1992d, para. 39). Joe Schneider, executive director of the Southwest Regional Research Laboratory, and Paul D. Houston, the superintendent of schools in Riverside, California claimed the Sandia report “inspired them to write a book making similar arguments” (Miller, 1992d, para. 33). Schneider “had presented the report at a Southwest Regional Research Laboratory board meeting and Houston had “invited him to present it at a back-to-school meeting for administrators and parent leaders” (Bracey, 2007b, para. 7).

Almost immediately after the invitations to this meeting were received, Dufour got on the phone to Houston to nix it with Schneider, implying his organization might jeopardize their federal funding if the meeting went forward (Bracey, 2007b, para. 8). The book, *Exploding The Myths: Another Round in the Education Debate* was published in February 1993 (Schneider and Houston, 1993). It included the Sandia report as an appendix.

The controversy had yet to subside by 1992. In July, the National Center for Education Statistics issued a statement referring to the Sandia report. “There continues to be a tendency to state conclusions or speculate about underlying patterns that are not supported by the data, or at least the data presented” (Miller, 1992d, para. 18-19). By September 1992, the administration began taking the offensive. Dufour admitted frankly that the Sandia researchers had “chosen to play this out in a political arena, and when you do that, the gloves come off” (Miller, 1992d, para. 35).

Bray later told Bracey after Bray's retirement that the report "was definitely suppressed" (Bracey, 2007a, para. 8). It was only published two years later in 1993 in a "small journal" for academic specialists, the *Journal of Educational Research* (Bracey, 2007a, para. 9).

Ravitch countered that "David Kearns knew, as did all the senators in that room, that there is no way that a report, an opinion, an essay, or any other expression of one's views can be suppressed," that the decision not to publish it through governmental channels "was based on evaluations of its quality by professional staff at the Departments of Energy and Education" (Ravitch, 2007, para. 10). Bracey replied that publication of the *Journal of Educational Research* "received zero media attention," far less than what important government reports often receive (Bracey, 2007b, para. 6).

Although Huelskamp stated "the draft report has been the subject of congressional testimony, editorials in the media, [and] an audit by the General Accounting Office" (Huelskamp, 1993a, p. 718), by the time Project Censored was on the case, it seemed he just wanted to move on. He told Project Censored "Sandia was not interested in replying to [their] questionnaire and that all further inquiries should be directed to a public information official" (Project Censored, 1994, para. 10). When Project Censored was finally able to get in touch with a second public information official willing to talk, the official said that "the study now has been published in the Kappan and that finished it" (Project Censored, 1994, para. 15).

The one academic critique of any substance agreed with all of the major findings of the Sandia report (Stedman, 1994, p. 145). Stedman further agreed with the report's finding of stable achievement levels. However, he argued while "performance generally has been stable, it remains at low levels" (Stedman, 1994, p. 145). Huelskamp preempted this line of criticism when he acknowledged early in the *Phi Delta Kappan* piece that "steady or slightly improving performance may not be adequate to meet future societal requirements" (Huelskamp, 1993a, p. 719). Stedman further opined that "few students achieve proficiency in the major academic areas; most have major gaps in their knowledge and skills" without describing what he meant by "knowledge and skills" and where he got the data to support his claims (Stedman, 1994, p. 145).

Although it is difficult to sift through all of the back-and-forth "he said, she said" accusations of this saga, an educated guess of what transpired can be made. A group of thorough, systematic, and intelligent researchers at Sandia Laboratory took seriously their department head's call to engage more with education. They completed a major longitudinal study on the

state of American education, benchmarked against international standards. Unfortunately, they arrived at empirical conclusions out of step with the political needs of the executive branch and the business sector.

This episode is a fascinating case study in the relationship between educational policy research and educational policy making. Because the Sandia report arrived at a conclusion at odds with the crisis rhetoric fueling *America 2000* and the march towards standards-based education, it also raises the notion that perhaps *America 2000* and standards-based education were not based on empirical data but ideologically motivated. As such, I am led to consider it in light of Smith, Miller-Kahn, Heinecke and Jarvis' (2004) typology of educational policies.

According to their scheme, there are four ideal types: instrumental ones, which “have effects consonant with the original intentions and ideals behind them”; symbolic ones, which “may have no effect at all because [they function] primarily as a symbol, without any substantive instrument that logically could be expected to further policy goals”; a third category is beyond scrutiny because, lacking “basic information, the public cannot possibly know the effects of a policy or participate intelligently in the debate over its values”; and a fourth category of policies whose “effects may be unintentionally deleterious” with the policy producing “unanticipated effects or costs, or effects contrary to the policy goals” (Smith, Miller-Kahn, Heinecke and Jarvis, 2004, pp. 8-10). Standards-based education seems to exhibit characteristics of all four typologies.

The tensions between equity and excellence, between federal and local control over education, simmered throughout 1991. At a June 1991 meeting of the National Education Goals Panel chaired by Governor Romer, members agreed on the need for higher standards but were divided as to who should develop and evaluate them. During this period, the traditional Democratic emphasis on equity emerged in discussion of opportunity-to-learn standards, which were benchmarks for resources (Kosar, 2005, p. 100). Issues of school choice, favored by the Bush administration as a sop to right-wing allies, proved divisive and interfered with efforts to arrive at a compromise bill (Miller, 1992a, para. 1). That year, the National Education Goals Panel released its first report. Although it advocated strongly for national standards, it failed to prod Congress to further action, in spite of the panel and the administration's efforts to broker a compromise (Stedman and Riddle, 1992, p. 4).

Meanwhile, the newly formed National Council on Education Standards and Testing was proceeding with its work as well. During a September 1991 meeting of that entity, their standards task

force chair, Marshall Smith, presented a paper proposing the establishment of content, performance, and delivery standards. The terminology and definitions of standards-based education were beginning to take shape.

Shortly after Smith's briefing, the National Council on Education Standards and Testing issued a highly anticipated report in support of national standards in January 1992. *Raising Standards for American Education* stated that

The council initially discussed standards and assessments as a way to help measure progress towards the National Education Goals but came to see the movement toward high standards as a means to help achieve the Goals. While mindful of the technical and political challenges, the Council concludes that national standards and a system of assessments are desirable and feasible mechanisms for raising expectations, revitalizing instruction, and rejuvenating educational reform efforts for all American schools and students. Thus, the National Council on Education Standards and Testing endorses the adoption of high national standards and the development of a system of assessments to measure attainment of those standards (National Council on Education Standards and Testing, 1993, p. 14).

According to the report, echoing *A Nation at Risk*, in the "absence of well-defined and demanding standards, education in the United States has gravitated toward de facto national minimum expectations" (National Council on Education Standards and Testing, 1993, p. 8). Therefore, the national standards proposed in the report were

critical to the nation in three primary ways: to promote educational equity, to preserve democracy and enhance the civic culture, and to improve economic competitiveness.

Further, national education standards would help to provide an increasingly diverse and mobile population with shared values and knowledge (National Council on Education Standards and Testing, 1993, p. 9).

To allay stubborn fears that standards might enhance federal control over education policy, the report stressed that the proposed national standards should be voluntary. It also proposed that a National Education Standards and Assessment Council be created to validate the work of states on standards and assessments. In keeping with the National Council on Education Standards and Testing's sense of itself as advisory, they did not want to engage in the controversial issue of who should draft the standards. They painted with a broad brush, merely saying: "a wide array of developers" should do the work (National Council on Education Standards and Testing, 1993, p. 11). Their report also noted a

“fundamental shift of perspective among educators, policymakers, and the public from examining inputs and elements of the educational process to examining outcomes and results” (National Council on Education Standards and Testing, 1993, p. 14). Although the report recommended delivery standards (another phrase for opportunity-to-learn standards) to assess resources and track equity, it was mute as to where this funding would come from.

The national testing component called for in the report came under immediate fire as a threat to equity and local control. “50 prominent educators and testing experts” issued a statement the same day the council’s report was released favoring such a national test (Chira, 1992, para. 1). Some feared national testing would reproduce “the caste-like status of non-European groups in American society,” in effect “blaming the victims” (Winfield and Woodard, 1992, para. 5). These attitudes carried forward into the Congressional debate in March 1992.

In its deliberations on the National Council on Education Standards and Testing report, the House Subcommittee on Elementary, Secondary, and Vocational Education focused their critique on the idea of national testing, the lack of emphasis on delivery standards, and leaving their formulation to the states most unable to provide adequate resources to schools. Some committee members cited a report from the Office of Technology Assessment which noted that “high-stakes tests caused negative, unintended consequences in the past” (Miller, 1992b, para. 17). For all the fanfare with which the report was released and in spite of significant initial support, it wound up doing little to forward the stalled agenda of *America 2000*. Furthermore, with a presidential election year looming, Democrats in Congress were ill inclined to negotiate further with the executive branch, especially when these efforts continued to be embroiled in school choice and voucher issues (Miller, 1992a, para. 1, 3).

Absent cooperation from Congress and with *America 2000* and the *Raising Standards for American Education* report seemingly dead in the water, President Bush threatened to veto any education legislation that reached his desk. Only a Republican Senate filibuster saved him from the potential political embarrassment of having to reject an education bill on the eve of an election. Few mourned its passing. As an aide for the House Education and Labor committee put it, “it’s no secret that nobody’s really enthusiastic about this bill” (Miller, 1992e, para. 13).

Towards the end of his administration, President Bush bypassed a recalcitrant Congress by awarding grants through the Department of Education, National Endowment for the Humanities, National Science Foundation, and various groups for the development of “voluntary national standards in seven school subjects (science, history, geography, the arts, civics, foreign languages, and English)”

(Ravitch, 2000, p. 432). These would “describe what children should be expected to learn in every major academic subject. These standards were intended to create a coherent framework of academic expectations that could be used by teacher educators, textbook publishers, and test developers” (Ravitch, 2000, p. 432).

Incoming president (and former chair of the National Governors Association when it played a leading role in conceptualizing national educational goals) Bill Clinton tried to re-energize standards-based education reform with three new initiatives. These plans, *Goals 2000*, the *Improving America's Schools Act*, and voluntary national tests - bore many similarities to *America 2000* (Kosar, 2005, p. 105).

Five weeks after Clinton took office, Congress began to move on his education agenda. The Senate Committee on Labor and Human Resources held a hearing on “the need to improve national education standards and job training opportunities,” inviting testimony exclusively from the Secretaries of Education and Labor, Richard Riley and Robert Reich (United States Congress, Senate, Committee on Labor and Human Resources, 1993, p. 2). The secretaries spoke of the need to adapt American education to a globalizing economy ever more dependent on technology and information, and in favor of occupational and educational standards. This was yet another milestone on the way to an ever-increasingly intertwined relationship between standards-based education, business, global economic competitiveness ideology, workforce development, and school-to-work. Riley also discussed a proposal from Clinton for a voluntary program that would fund states to create their own standards. These would in turn be certified by a new federal council. Clinton's proposal would have also created an “Opportunity-to-Learn Commission.” This commission would be charged with the development of

voluntary standards to address such issues as: the capability of teachers to provide quality instruction to their areas; the extent to which teachers and administrators have continuing and ready access to the best knowledge about teaching and learning and how to make needed school changes, and the quality and availability of challenging curricula geared to meet world class standards (United States Congress, Senate, Committee on Labor and Human Resources, 1993, p. 14).

As Clinton and his officials began protracted negotiations with Congress, the traditional battle lines of equity versus quality remained in place. Congress argued for equity and resources through opportunity-to-learn standards and the administration argued in favor of voluntary content and

performance standards. After months of back and forth, President Clinton transmitted the *Goals 2000: Educate America Act* to Congress on April 21, 1993 (Clinton, 1993, para. 1). In summary, the bill was to do the following:

- [1] Set into law the six National Education Goals and establish a bipartisan National Education Goals Panel to report on progress toward achieving the goals;
- [2] Develop voluntary academic standards and assessments that are meaningful, challenging, and appropriate for all students through the National Education Standards and Improvement Council;
- [3] Identify the conditions of learning and teaching necessary to ensure that all students have the opportunity to meet high standards;
- [4] Establish a National Skill Standards Board to promote the development and adoption of occupational standards to ensure that American workers are among the best trained in the world;
- [5] Help States and local communities involve public officials, teachers, parents, students, and business leaders in designing and reforming schools; and
- [6] Increase flexibility for States and school districts by waiving regulations and other requirements that might impede reforms (Clinton, 1993, para. 5–10).

By May 1993, both chambers had begun hearings on the measure, although they focused more on the job training component than on standards. Reauthorization of Title I of the *Elementary and Secondary Education Act* was a bigger priority than standards to Representative William Ford, chair of the House Subcommittee on Elementary, Secondary, and Vocational Education. After Clinton called for “tough world-class academic and occupational standards for all our children” in his *1994 State of the Union address* (1994, para. 23), Congress finally sent a bill to conference committee in March 1994.

The most contentious issues were opportunity-to-learn standards and abiding fears that the measure might enhance federal control over education. In spite of these concerns, *Goals 2000* was signed into law on March 31, 1994 (United States Department of Education, 2005, para. 11). In the process of reconciling so many disparate and conflicting viewpoints, “a very confused piece of legislation” was created (Kosar, 2005, p. 132). Many of its most significant provisions were left voluntary to the states.

Among the eight goals it articulated were a number of which reiterated global economic competitiveness ideology, particularly goals 3, 5, and 6.

(3) By the year 2000, all students will leave grades 4, 8, and 12 having demonstrated competency over challenging subject matter including English, mathematics, science, foreign languages, civics and government, economics, arts, history, and geography, and every school in America will ensure that all students learn to use their minds well, so they may be prepared for responsible citizenship, further learning, and productive employment in our Nation's modern economy.

(5) By the year 2000, United States students will be first in the world in mathematics and science achievement.

(6) By the year 2000, every adult American will be literate and will possess the knowledge and skills necessary to compete in a global economy and exercise the rights and responsibilities of citizenship (United States Congress 1994b, para.3, 5-6).

By the mid-1990s, the standards-based education reform model seemed to be gaining momentum. It was entering state and federal law. National disciplinary organizations had completed or were in the process of drafting voluntary national standards. Some states had drafted their own individual standards. The concept seemed to have the support of influential education leaders as well as a bipartisan group of policymakers and key aides. Paradoxically, however, at this moment when critical mass seemed to be in sight, the movement also began to falter (Diegmueller, 1995; Firestone 1997).

The “Republican Revolution” of 1994, when control over Congress shifted from the Democrats to the Republicans, made the always politically contentious debates between “equity,” “equality,” “quality,” and “accountability” even more so. Some of the voluntary national standards drafted by the national disciplinary organizations had controversial receptions. The state standards were inconsistent in terms of quality and design. Debates over the proper balance between the local/state and federal roles in education seemed intractable. The entire reform idea looked like it was about to disintegrate.

Even though *America 2000* passed into law on March 31, 1994, business leaders continued sounding the alarm about global economic competitiveness. A month after a *New York Times* headline exclaimed *The American Economy: Back on Top*, Gerstner published in op-ed in

the same newspaper entitled *Our Schools Are Failing: Do We Care?* (1994). In it he repeated the familiar litany. “It is a deeply dangerous situation. We cannot transform business and the economy without a labor force that is prepared to solve problems and compete on the global level” (Gerstner, 1994, p. A11).

Gerstner’s piece went on to claim that American business was spending \$30 billion on worker training and losing \$25-30 billion “each year as a result of poor literacy among workers. We can’t squander \$60 billion and remain competitive” (Gerstner, 1994, p. A11). “The future is even bleaker,” he said, going on to cite a National Association of Manufacturers survey which claimed “30% of companies cannot reorganize work activities because employers can’t learn new jobs, and 25% can’t upgrade their products because their employees can’t learn the necessary skills” (Gerstner, 1994, p. A11). Among the remedies offered were what would eventually become the essential aspects of standards-based education: “a greater emphasis on outcomes, the specific tasks that graduates are prepared to do” (Gerstner, 1994, p. A11).

A year later, Gerstner went on to publish a book elaborating on his call for outcomes-based education, enhanced by the business management technique of total quality management (Gerstner, Semerad and Doyle, 1995).

It was also during the mid-1990s that business began switching gears, from merely sounding the alarm to trying to shape the contours of standards-based education. The Business Roundtable took the lead (Business Roundtable, 1992a,b, 1993, 1995, 1996, 1998, 1999, 2000a,b,c, 2001)

Given the laxity in quality control in *Goals 2000* regarding standards, it is not surprising that by mid-1995, 47 states applied for funding under the measure and none were refused, even though “few developed adequate standards and assessments” (Kosar, 2005, p. 133). In a concession designed to placate those who feared the National Education Standards and Improvement Council might become a mechanism of control by the federal government, the pre-existing National Education Goals Panel was given considerable authority over the council. The panel would also nominate members to the council, and evaluate, approve, and disapprove “criteria for the certification of State content standards, State student performance standards, State assessments, and State opportunity-to-learn standards,” as well as the “voluntary national content standards, voluntary national student performance standards, and voluntary national opportunity-to-learn standards” (United States Congress, 1994a, para. 1). Since 12 of the panel’s 16 members were state officials (8 governors and 4 state legislators), they had little incentive

to make certification standards so difficult they might be setting up their states to fail (Kosar, 2005, p. 134). In this way, practical politics further diluted the “standards of standards.”

The new law prohibited use of the National Education Standards and Improvement Council certification for high-stakes testing, such as “graduation, grade promotion, or retention of students for a period of four years from the date of the Act,” although they would be free to do so after that (United States Congress, 1994a). The status of opportunity-to-learn standards in the Act was contradictory, in an effort to appease opposing liberal and anti-statist factions in Congress, which led to an ongoing confusion and ambiguity about the status of these standards as well. The curious compromise in the implementation of the act was that every participating state wound up submitting “plans clarifying how they would raise standards and fashion opportunity-to-learn standards, but never to seek NESIC approval for those standards” (Kosar, 2005, p. 135).

In the autumn of 1994, two events further exposed the dramatic challenges facing the emerging standards-based reform idea. The first was the October 20, 1994 op-ed piece Lynne Cheney in the *Wall Street Journal* entitled *The End of History* (Cheney, 1994, p. A22). Her article precipitated a major controversy. Significant media attention was given to the history standards which had just been released by the National Center for History in the Schools at the University of California at Los Angeles, one of the many disciplinary organizations the Department of Education and others had contracted with to draft standards in core curricular areas in the waning months of the Bush administration. The history standards reflected a position similar to the multicultural movement. They highlighted previously neglected women and people of color instead of continuing to valorize the traditional roster of pale dead males. They also gave prominence to what many perceive as shortcomings in the mainstream conventional wisdom about how American history is portrayed in school materials and the mainstream media. This perspective often gives short shrift to such matters as genocide, land theft, slavery, misogyny, and imperialism. These topics are rarely discussed in school civics, social studies, and history classes.

The Senate even joined in the debate, voting 99 to 1 to condemn the history standards (Johnston and Diegmueller, 1995, para. 1).

This “negative” view of America was an attractive target for the politicians who came to power during the “Republican revolution” of November 1994. Many of them campaigned on “culture war” issues. Cheney’s article gave emboldened Republican hard-liners additional justification to attack the history standards and the rest of Clinton’s overall education initiative. The Republican critique centered

largely on the perceived over-involvement of the federal government in local and state education.

Despite persistent threats to abolish the Department of Education, by the time the Congress passed its next round of education measures in the Appropriations Act of 1996 in April, the department was funded at the same level as the previous year (United States Congress, 1996, pp. 230–238). The legislation also modified *Goals 2000* by deleting opportunity-to-learn standards and abolishing the NESIC before any members had even been appointed.

Opportunity-to-learn standards, system delivery standards, and other similarly named standards were an important part of the policy debate in the early years of this concept. They basically involved making explicit the amount of financial resources that would be necessary to implement the other types of standards. After only a few years, these types of standards fell to the wayside, never to be heard from again.

Republican antipathy to a perceived over-involvement of the federal government in education can also be seen in their two year delay of a vote on the appointment of Marshall Smith, the former chair of the standards task force of the National Council on Education Standards and Testing, to Deputy Secretary of the Department of Education. This was likely in part because of his association with standards. For their conservative base, standards remained a Trojan horse, a ploy for the federalization of education. So abiding was their distrust that one right-wing policy analyst called it “an Orwellian exercise in government-approved truth” (Morrison, 1996, para. 8).

Since the NESIC was abolished, “there was no organization to evaluate the drafts prepared by the groups that had been funded to write voluntary national standards, nor was there any other formal public review process” (Ravitch, 2000, p. 432). Any sense of a rigorous national standard for evaluation of standards collapsed.

The first set of voluntary national standards to emerge were the math standards, created by the National Council of Teachers of Mathematics without any federal resources. These standards grew out of the 1983 report by the Commission on Precollege Education in Mathematics, Science and Technology. Subsequent discussion of the matter at various conferences led the council to convene a Commission on Standards for School Mathematics in 1986 to begin drafting standards. These were released in March 1989 as *Curriculum and Evaluation Standards for School Mathematics* (National Council of Teachers of Mathematics, 1989)

They were well received initially, especially as a welcome and definitive break from the discredited “new math.” Upon further scrutiny and with an accumulation of experience as to how they

played out in the classroom, many, especially parents, began to chafe. Their de-emphasis on correct answers, basic computational skills, and perceived over-reliance on calculators seemed to many an assault on basic numeracy. Frustrated parents in California “led by mathematicians and engineers” organized themselves under the name Mathematically Correct, using “the Internet to find like-minded mathematicians, teachers, and parents” beginning in 1995 (Ravitch, 2000, p. 440).

Other curricular areas did benefit from federal funding. These included the following (and their date of release and who drafted them): the arts (March 1994; Consortium of National Arts Education Associations), civics and government (November 1994; Center for Civic Education), science (November 1995; National Research Council of the National Academy of Sciences, National Academy of Engineering, and Institute of Medicine), foreign languages (January 1996; consortium of the American Council on the Teaching of Foreign Languages and disciplinary associations), and English language arts (March 1996; National Council of Teachers of English and International Reading Association).

Curricular areas that issued standards without the aid of federal resources included health (May 1995; Joint Committee on National Health Education Standards), physical education (June 1995; National Association for Sport and Physical Education), and economics (January 1997; consortium of the National Council on Economic Education and disciplinary associations) (Watt, 2000, pp. 7–11). Among these, however, few received nearly as much publicity as the history, mathematics, and English language arts standards.

The English language arts standards have been called “an unmitigated disaster” lacking rigor, substance, “content and actual standards” (Ravitch, 2000, p. 437). In 1994, the Department of Education ceased funding the project. In spite of the loss of federal funding, the National Council of Teachers of English and International Reading Association continued their work on language arts standards (in conjunction with the Council of Chief State School Officers). They were released in March 1996 (Watt, 2000, p. 7). One primary complaint that emerged against the standards was made against their call for students to “develop an understanding of and respect for diversity in language use, patterns, and dialects” (National Council of Teachers of English and International Reading Association, 1996, para. 11). In Ravitch’s own words, the standards “essentially says we should not hold students to any standards!” (Watt, 2000, p. 438). Others considered them more of a pedagogy than standards per se (Watt, 2000, p. 441).

Another major piece of education legislation passed during the Clinton administration was the *Improving America's School Act*, signed into law during October 1994. It “required each state to

develop state content and performance standards for mathematics and reading by the 1997–1998 school year and assessments by the 2000–2001 school year appropriate for all students, including the disadvantaged” (Watt, 2000, p. 13).

This stage in the development of standards-based education was marked by some curious contradictions. On the one hand, it was the culmination of a process that began as far back as 1983 with the release of *A Nation at Risk*. The federal government’s Department of Education had invested over \$24 million in “the development of curriculum frameworks and content standards in 30 states” (Olson, 1995, para. 9). Standards enjoyed the support of Democratic and Republican presidential administrations a bipartisan group of governors, and key elements of the federal bureaucracy (Standards, 1995, para. 4).

Furthermore, a wide variety of disciplinary organizations had either completed or were hard at work drafting subject matter standards, as were the states themselves. As Olson says, “forty-six states have applied for federal grants under the *Goals 2000: Educate America Act*...to develop content standards and a related system of assessments” (Olson, 1995, para. 7). In spite of this support, questions were beginning to emerge as well.

Who should set standards and who has the right to say whether they are good enough? Are the proposed standards really for all children, from the gifted and talented to those with special needs? Will all students have access to the instruction and resources needed to achieve the standards? Will the standards dictate a national curriculum in a country that has a strong tradition of local control in education? What role, if any, should the federal government have played in developing standards? And are the emerging documents both politically balanced and academically rigorous? (Standards, 1995, para. 6).

Perhaps some drafters underestimated the difficulties inherent in crafting documents as complex as standards. It was also unclear as yet how the educational systems could utilize them. The voluntary national standards drafted by the national disciplinary organizations themselves were under political attack from the right and left. States and districts chafed at what they saw as attempts to undermine long traditions of local control. The link between standards and “better assessments, teacher training, new textbooks, and other resources to help students achieve the standards” was often absent or weak (Standards, 1995, para. 2). The definition of “standards,” nomenclature for comparable activities, and links (or lack thereof) “to statewide tests, professional development, and graduation requirements” varied widely among the states (Olson, 1995, para. 18).

The challenges facing this burgeoning reform notion were so pervasive that *Education Week* saw fit to devote its April 12, 1995 issue to the subject. In spite of these challenges, the movement pressed forward, aided by a number of events. These events included the second National Education Summit convened in March 1996, the re-election of President Clinton in November 1996, the *State of the Union address* in February 1997, the third National Education Summit held in September 1999 and the fourth National Education Summit called in October 2001 (Watt, 2000, p. 12).

The second National Education Summit was held at IBM's Pacific Palisade Conference Center and hosted by Louis Gerstner, CEO of IBM. CEOs of blue chip American companies, the National Governors Association, and leading conservative education thinkers were all involved (Horn, 2004, p. 23). Emerging from the summit was a preference for state- and locally-generated standards and enhanced consideration of workforce development issues in drafting them. CEOs represented by the Business Roundtable kept up the pressure for workplace readiness.

Another impetus for the survival of standards-based education came with the multi-pronged efforts of Mid-continent Research for Education and Learning (McREL) to calibrate, reconcile, and consolidate widely varying state and local standards. As a part of this initiative, they examined "4,100 benchmarks distributed among 256 standards" to create an online database (Kendall and Marzano, 1996, para. 41; Mid-Continent Research for Education and Learning, 2009). Next, they engaged in a study designed to boil down the subject matter content standards to key essentials. As a follow-up, they also "convened a National Dialogue on Standards-Based Education in April 2001 to give stakeholders a mechanism for meeting face-to-face and online to continue refining the dialogue regarding standards" (Watt 2000, p. 12).

Other organizations contributed to the ongoing refinement. The Council for Basic Education published "a book presenting condensed, edited and commonly-formatted versions of the national standards" (Watt, 2000, p. 21). Business and the governors continued their long-standing support for standards by collaborating to establish another database of standards, as well as a methodology for their evaluation, through the Achieve Resource Center on Standards, Assessment, Accountability and Technology. Achieve, Inc. assumed much of the traditional role played by the Business Roundtable in educational policy reform efforts

There were other initiatives as well. For example, the Coalition for Goals 2000 tasked itself with "developing a set of self-guiding tools which school districts can use to develop their own academic standards based on national and state benchmarks" (Starr, 1998, para. 24), and "collaborated

with the Education Leaders Council to create a results card for analyzing the impact of state standards” (Watt, 2000, p. 12).

The Department of Education conducted a review in 2000 to evaluate “the alignment of each state’s assessment system with its content and performance standards to ensure they met requirements for funding Title 1 programs” (Watt, 2000, p. 13). After passage of Bush’s hallmark education legislation *No Child Left Behind* in 2002, his education secretary Rod Paige convened a committee to revamp standards and assessments and receive public feedback. At the conclusion of this process, his department promulgated new regulations on the matter.

Among the most ambitious standards and assessment initiatives of the 1980s and 1990s was the New Standards Project. This national coalition teamed up “approximately 17 states and seven urban school districts, co-directed by Lauren Resnick of the Learning, Research, and Development Center of the University of Pittsburgh and Marc Tucker of the National Center on Education and the Economy in Washington, D.C.” (Spalding, 2000, p. 2) It strove to create a unified system of standards and performance assessment. Their initial portfolio- based assessment initiative proved too difficult to grade on a mass, standardized basis, although it had the unintended and positive impact of enhancing teacher professionalism in the process.

This chapter explored how President Bush, his Secretary of Education Lamar Alexander, and others worked to pass Bush’s signature piece of education legislation, *America 2000*. Because it ran into political difficulties from the right on matters of school choice and the left on matters of equity, ultimately, it failed to pass. Sensing he didn’t have the Congressional support to pass *America 2000*, Bush enacted portions of it by executive authority, primarily by underwriting the drafting of model national standards that state and local jurisdictions could look to as guides. This chapter also examined the impact of these voluntary national standards in fomenting the standards wars during the tenure of the next president, Clinton, who had been instrumental earlier, at the Charlottesville summit and other venues, in crafting education policy during this period. When Clinton assumed the presidency, he reintroduced *America 2000* to Congress as *Goals 2000* substantially unchanged and, this time, it passed. This success was not unqualified. President Clinton and a variety of other business leaders, researchers, and governors fought back against resistance to standards-based education from a wide variety of quarters. Their successful defense helped make the concept a settled part of state and federal education

policy with the *Improving America's Schools Act* of 1996. As the 1990s drew to a close, every state except Iowa had drafted standards.

CHAPTER 8 – HAWAI‘I, A CASE STUDY (1991 – PRESENT)

One of the motivations for engaging in this overall study is that there is presently no single volume tracing the history of standards-based education in the United States, even though it is arguably one of the most influential education reform models during the last several decades, except perhaps for Hamilton, Stecher and Yuan (2008). As there has been no single comprehensive study of this idea, neither has there been a study of its evolution over time in a single state, except for perhaps Horn and Kincheloe (2001) on Texas. This chapter seeks to address that lacuna. In this chapter I will sketch the political context that made Hawai‘i one of the early adopters of this model, a context which also guided successive iterations of standards by Hawai‘i in the years that followed. Finally, I will summarize the literature evaluating Hawai‘i’s standards by external experts.

Hawai‘i engaged with the standards-based education reform model earlier than most states. To sketch the political and educational context for Hawai‘i’s early adoption of standards-based education, we must examine a number of local initiatives undertaken during the late 1980s and early 1990s. These include 1) the *Hawai‘i Report* drafted by Berman Weiler Associates (1988), 2) Senate Bill 1870, which created school-community based management (1989), 3) the Department of Education’s Project Ke Au Ho during Charles Toguchi’s tenure as Superintendent (1991 onward), 4) a task force on educational governance headed by then Lt. Governor Ben Cayetano (early 1990s), 5) Act 334 which created the Hawai‘i Commission on Performance Standards (Session Laws of Hawai‘i, 1991), 6) the Department of Education, University of Hawai‘i College of Education, and Kamehameha Schools collaboration on assessment and accountability (1992-1993), and 7) the establishment of the Hawai‘i Performance Standards Review Commission and subsequent committees in 1994 in Hawai‘i Revised Statutes 302A-201, subsequently repealed in 2009.

After having already drafted two influential policy reports for Minnesota and California, the Hawai‘i Business Roundtable commissioned Berman Weiler Associates to draft a similar brief on educational policy reform in Hawai‘i. This was released in 1988. While it did not advocate for standards-based education per se – understandably, as the idea had not yet fully emerged - it did use global competitiveness ideology as one of the ideological drivers for the reforms it suggested. For example,

while Hawai‘i public education strives to close the present gap, other states will be taking steps to prepare their citizens for a challenging future in an increasingly competitive and rapidly changing world (Berman, 1988b, p. 6).

Comparably, the report also stated that

Hawai‘i public schools must enable all students, without exception, to learn to their potential and to master the knowledge, skills and values needed for social and economic success in the 21st century” (Berman, 1988b, p. 6).

While the *Hawai‘i Report* may not have advocated for standards-based education per se, it did use rhetoric that anticipated it in a number of ways. For example, it called for the Board of Education to “establish core competencies and mastery examinations at grade six and ten that schools would gradually revise and focus the curriculum to enable all students to master core competencies” (Berman, 1988b, p. 26). It also used the word “standards” in the everyday sense of “high expectations,” although it was precisely during this period of the late 1980s and early 1990s that we witnessed a collective shift of the use of the word in policy talk from this everyday sense towards the more technical sense of the word that we are familiar with today. “High standards expected for all students. All students would be expected to master the same core competencies to prepare them for the transition to education and/or work” (Berman, 1988b, p. 39). Or, similarly, “there can be no more important change in schooling than raising the expectations for each and every young person. Although teachers are ultimately most responsible for setting high expectations” (Berman, 1988b, p. 40).

Ultimately, however, the most influential impact of the report on public K-12 education in Hawai‘i was to be found in its call for decentralization. The report noted “the BOE mandated School Community Councils In 1978. However, these councils have little authority. Consequently, most are either ineffectual or defunct” (Berman, 1988b, p. 20). Nevertheless, the report recommended giving the idea another try, modeled on the burgeoning reform idea of school/community-based management (SCBM). As Hawai‘i has the only state-wide education district in the United States and anti-bureaucratic sentiment was pervasive during this time, the call for decentralization resonated among policy makers.

“In December 1988, one month after the release of the Hawai‘i Plan, DOE Superintendent Charles Toguchi and DOE staff conducted a site visit to the Dade County Florida schools” to see the SCBM idea in action (Berman, 1988b, p. 23). Perhaps in response to

Toguchi's findings during this trip, "then-Governor John Waihee urged the Legislature to pass legislation allowing SCBM schools" during the Legislature's opening day in 1989 (Erbes, 2003, p. 22). The Legislature responded by passing Senate Bill 1870 in April 1989, which the Governor signed into law during June of that year. Passage had been made possible in part by "the support of business and community leaders" (Erbes, 2003, p. 22). Other key stakeholders quickly followed suit as well. In July 1989

the Hawai'i State Teachers Association signed a "Memorandum of Understanding" with the BOE supporting SCBM. In November 1989 the BOE adopted SCBM policy and implementation guidelines, and in January 1990 Waialae Elementary submitted a "Letter of Intent" to become the first SCBM (Erbes, 2003, p. 22).

Waialae Elementary later went on to become one of the first charter schools in the state as well, shortly after enabling legislation passed in 2000.

To support this decentralization initiative, the Superintendent of Education Charles Toguchi "launched Project Ke Au Hou ("A New Era") to "enhance greater school-level decisionmaking" and "reconceptualize and transform the state and district offices to become primarily support-providers to schools" (Hawai'i Department of Education, 1991a, p. 1).

The vision of Project Ke Au Hou was developed with "widespread input from school, district, and state levels within the Department of Education (DOE), as well as input from community organizations and others" and

shifting authority and positions from district and state levels to the school level to ensure that decisions affecting students and the learning environment are directly responsive to individual classroom and pupil needs (Hawai'i Department of Education, 1991b, p. 1).

As Toguchi initiated this project in early 1991, this mandate for "shifting authority" and "responsiveness" reverberated with consistent calls throughout the *Hawai'i Report* for "accountability."

Another impetus for decentralization was a task force on educational governance led by then Lt. Governor Ben Cayetano during the early 1990s.

In 1991, the Hawai'i State Legislature passed Act 334 (Session Laws of Hawai'i, 1991). This created an 11-member Hawai'i Commission on Performance Standards, which was approved by Governor John Waihee on July 8, 1991. The findings section of Act 334 noted "one of the unresolved issues in Hawai'i's educational system is accountability" (Hawai'i State

Legislature, 1991, p. 1045). Absent such accountability, it would be “difficult to determine the success or failure of the system in meeting the central goals of education as stated in the Hawai‘i Goals for Education dated September 29, 1990” (Hawai‘i State Commission on Performance Standards, 1994, p. 5).

The Act further asserted that standards could “insure that students in Hawai‘i’s public school system are able to master basic skills and essential competencies necessary to succeed in life” (Hawai‘i State Legislature, 1991, p. 1045). The charge to the newly-created commission was to “set the performance standards of achievement expected of students in public schools and the means to assess educational achievement.” The session law mandated an interim report by June 30, 1992, and a final report due shortly before the 1993 regular session (p. 1045).

As the Hawai‘i Commission on Performance Standards and Project Ke Au Hou began their work on standards and decentralization, a group of professors from the University of Hawai‘i College of Education’s Department of Curriculum and Instruction launched a critique on a related subject, the shortfalls of the Department of Education’s exclusive reliance on standardized Stanford Achievement Tests, preferring instead what was then referred to as “authentic assessments.”

When David Ericson was chair of the Department of Curriculum and Instruction in the fall of 1992, he and a number of colleagues from the department penned a letter on the matter. It was supposed to be sent to the Superintendent Toguchi first and then to the two major local daily newspapers later but the department secretary accidentally reversed the order and sent it to the newspapers first and Toguchi second. This sparked a front page headline in one of the papers saying something to the effect that “University of Hawai‘i Professors Blast Department of Education.” While Toguchi was not pleased with this adverse publicity, he convened a collaborative effort between the University of Hawai‘i, Department of Education, and Kamehameha Schools to address the issue of authentic assessments. He also urged the committee to focus on the additional topic of accountability as well. Approximately 80 people from these three entities worked for about a year to develop a *Hawai‘i State Framework for Student Assessment and Accountability* (Ericson, 2011).

In its findings, we see a Hawai‘i an example of the linkages between standards, curriculum, instruction, and assessment that were becoming commonplace on the mainland United States as this model evolved.

The state framework for student assessment and accountability is an interactive system. In this system, state standards are primary and provide the focal point and foundation for a student assessment and accountability system. These standards include content domain standards, performance standards and system delivery standards which can be linked with similar standards developed at the national level. The model illustrates that curriculum, instruction and assessment are based on educational standards, standards that represent what is valued and what is considered important for our students to know and be able to do (Hawai‘i School University Partnership, 1994, p. 3).

What was unique about the interpretation of standards in the *Hawai‘i State Framework for Student Assessment and Accountability*, however, was that “curricular and instructional efforts should be driven by standards of excellence embedded in the various content domains for understanding experience” in order to “inform our vision of a fully educated person” (Hawai‘i School University Partnership, 1994, p. 4). This notion of anchoring standards-based education in a “vision of a fully educated person” was never typical of the model. Certainly, today, it has fallen to the wayside in favor of a more instrumental approach that focuses more narrowly on what students should supposedly know in each subject matter during each grade.

The Hawai‘i State Commission on Performance Standards started out on its work by reviewing the local and national literature, with particular attention paid to the work done by Colorado, Kentucky, Idaho, and California, by the national professional organizations, and by the influential Secretary of Labor’s *Secretary’s Commission on Achieving Necessary Skills Report*. Then, over 100 local subject matter experts were consulted for their input on “what students should know, be able to do and care about by the time they leave 12th grade” (Hawai‘i State Commission on Performance Standards, 1994, p. 4). This feedback was distilled into a draft document then taken to the people of Hawai‘i for their comments in “ten public forums . . . held on six different islands” (Hawai‘i State Commission on Performance Standards, 1994, p. 4). This feedback was incorporated into a revision of the draft document, in conjunction with model standards documents, under the general guidance of Pacific Resources for Education and Learning (PREL) staff.

Finally, PREL convened meetings of the commission to solicit their feedback and eventual approval of the draft standards. At this time, the commission also “decided to establish content standards” as a “prerequisite to performance standards” (Hawai‘i State Commission on

Performance Standards, 1994, p. 6). Although they clearly specified that they did not want to link the draft standards with “any specific assessment procedure,” they did discuss key criteria that should guide the state’s assessment efforts and they recommended participation in both the development of the Center for Research on Evaluation, Standards, and Student Testing’s (CRESST) history assessment instrument and the New Standards Project (Hawai‘i State Commission on Performance Standards, 1993, p. 137). The bulk of the December 1993 *Preliminary Final Report* of the commission was composed of their draft standards (Hawai‘i State Commission on Performance Standards, 1993).

The commission’s June 1994 *Final Report* was far more voluminous and divided the more thoroughly elaborated “content and performance standards” into two sections: “by content area (i.e. in all grade levels in language arts, math, science, etc) [and] by grade level sections (i.e. all content areas sectioned K-3, 4-6, 7-8, 9-12)” (Hawai‘i State Commission on Performance Standards, 1994, p. v). Another salient difference between the preliminary report and the final report was the latter’s more intensive focus on the establishment of an assessment system coordinated with the standards, guided by six criteria and three recommendations (Hawai‘i State Commission on Performance Standards, 1994, pp. 364-367). Furthermore, a model cited as a promising one for implementing standards-based education in Hawai‘i was the relationship between teaching and research inherent in the University of Hawai‘i’s Curriculum Research & Development Group’s partnership with the University Laboratory School (Hawai‘i State Commission on Performance Standards, 1994, pp. 375-376).

The work of the commission was published in 1994 as the *Hawai‘i Content and Performance Standards* (HCPS). Commonly known as the “Blue Book,” it provided “standards for students completing the final year in each of four sets of grades—K-3 (primary), 4-6 (elementary), 7-8 (middle school), and 9-12 (high school)” (Hawai‘i State Performance Standards Review Commission 1999, p. 7). These standards were adopted by the Board of Education (BOE) in October, 1994 (Standards: setting, 1995).

They were voluminous: 1,544 standards in all including “495 . . . in language arts, 119 in mathematics, 418 in science, 133 in social studies, 113 in health and fitness, 89 in fine arts, 101 in home and work skills, and 76 in world languages” (Hawai‘i State Performance Standards Review Commission 1999, p. 8).

During the 1994 session, the Hawai‘i State Legislature passed a law that would become Section 302A-201, Hawai‘i Revised Statutes. This statute called upon the BOE to appoint a “performance standards review commission, to be convened at the beginning of the 1997–1998 school year, and every four years thereafter” composed of various education stakeholders and professionals (Hawai‘i State Legislature, 1994). In addition to the representatives of the Hawai‘i State Parent Teacher Student Association, the Hawai‘i State Student Council, the State Superintendent of Education, the Dean of the University of Hawai‘i College of Education, and the professional education committee seats required by statute, the BOE also appointed “a principal, a School Renewal Specialist, an intermediate school teacher, a Title I teacher, a business community representative, and a representative of the community-at-large” (Hawai‘i State Performance Standards Review Commission, 1999, p. 9-10). The commission was charged to “review the implementation of the performance standards by the board and the schools to determine whether or not the standards should be modified” (Hawai‘i State Legislature, 1994).

Hawai‘i’s momentum and pioneering role were maintained at the national level when Hawai‘i became the first state to receive federal money to develop standards under President Clinton’s *Goals 2000* legislation in July 1994 (“A Goals,” 1998 para. 6).

The Performance Standards Review Commission (PSRC), created by Hawai‘i Revised Statutes 302A-201 in 1994, came together in 1998 to fulfill its duties. It convened public fora, received testimony, visited schools, gathered expert opinion, made presentations to key stakeholders, conducted an extensive review of “more than 50 standards documents,” and was briefed on “the significance of standards in regard to federally funded programs, particularly Goals 2000 and Title I” (Hawai‘i State Performance Standards Review Commission, 1999, pp. 1, 10).

Perhaps the most crucial finding of its January 1999 final report was that “standards-based education is an extremely effective way to improve student learning”; other key findings were that the “Blue Book” lacked performance standards, didn’t cover some academic areas, and wasn’t “user-friendly” (Hawai‘i State Performance Standards Review Commission 1999, p. 2). The lack of an “overarching vision” and “systematic implementation plan” hampered utilization of standards as well (Hawai‘i State Performance Standards Review Commission, 1999, p. 2). Furthermore, the report stated that “a statewide assessment system is lacking” and should be developed, in alignment with the standards (Hawai‘i State Performance Standards Review

Commission, 1999, p. 2). The report also contextualized Hawai‘i’s efforts by noting that “as of 1995, 48 states were engaged in developing academic standards.” (Hawai‘i State Performance Standards Review Commission, 1999, p. 5). To address one of these major concerns, the Hawai‘i Department of Education drafted a *Strategic Plan for Standards-Based Education* (1999a), followed up by a *Strategic Implementation Plan* in 2003.

In its discussion of the school community fora held by the commission, the report noted that public feedback indicated that there were too many standards, most of the performance standards are actually content-oriented, [and] many standards are duplicative and difficult to understand” (Hawai‘i State Performance Standards Review Commission, 1999, p. 13). A tremendous need for additional time, resources, and guidance in understanding and using the standards came up again and again as well (Hawai‘i State Performance Standards Review Commission, 1999, p. 15).

The Curriculum Research & Development Group at the University of Hawai‘i at Mānoa executed a Memorandum of Agreement to “organize, analyze, and summarize each school’s review of the standards and to study instructional modules or standards applications that have been developed by individual schools or several schools grouped in a complex” (Hawai‘i State Performance Standards Review Commission, 1999, p. 18). The ensuing report, *Hawai‘i Content and Performance Standards: Schools’ Review of Standards and Instructional Module Development* (Lai, 1998) was provided to the commission by principal investigator Dr. Morris Lai during a February 27, 1998 meeting. It proved to be “very useful to the Commission’s deliberations” and helped the commission to understand “that schools and complexes vary considerably both in their understanding of the assigned tasks and in the extent to which they tried to accomplish them” (Hawai‘i State Performance Standards Review Commission, 1999, p. 18).

In their literature review, the commission was especially interested in “criteria for judging standards,” which led them to give careful consideration to the work of “the American Federation of Teachers (AFT), Council for Basic Education, Mid-continent Regional Educational Laboratory (McREL), Southern California Comprehensive Assessment Center, U.S. Department of Education, and the state of California Academic Standards Commission” (Hawai‘i State Performance Standards Review Commission, 1999, pp. 18-19). They examined model programs for implementation as well, especially the National Center on Education and the Economy’s New Standards Project, which had already certified 15 trainers through the Department of Education’s (DOE) Office of Accountability and School Instructional Support. Model material from other

states was examined, “particularly Vermont, Delaware, Kentucky, and Virginia—states regularly lauded for their progress by such organizations as the Educational Commission of the States and cited for their programs by the U.S. Department of Education” (Hawai‘i State Performance Standards Review Commission, 1999, pp. 18-19).

In 1999, the DOE drafted “a comprehensive needs assessment of the public schools system” which “found that the ‘Blue Book’ did not adequately reflect some important dispositions, attitudes, and skills that students should achieve” (Hawai‘i State Auditor, 2001, p. 3).

In response to the 1999 Hawai‘i State Performance Standards Review Commission report and the DOE’s 1999 “comprehensive needs assessment,” the DOE promulgated the HCPS II, often referred to as the “rainbow series” after the differently colored booklets of standards for 10 academic subjects (Hawai‘i State Auditor, 2001, pp. 2-3). In August 1999, these were approved by the BOE (Hawai‘i State Performance Standards Review Commission, 2003, p. 20). This second round of standards not only covered a more comprehensive array of subject matter areas, but it also included true performance standards and reduced the number of standards considerably from 1,544 to 139, although these performance standards were not entirely complete upon publication (Hawai‘i State Auditor, 2001, p. 3). It also grouped them “into grade clusters, rather than grade levels” (Hawai‘i State Performance Standards Review Commission 2003, p. 20). In addition, the DOE also drafted the booklet *Making Sense of Standards, Moving From the Blue Book to HCPS II* in 1999 (Hawai‘i Department of Education, 1999b) to enhance the user friendliness of the standards, as suggested by the commission’s January 1999 report. The report noted that “placing standards at the core of the system unified curriculum, instruction, assessment/accountability, and staff development” (Hawai‘i State Performance Standards Review Commission, 1999, p. 6). It also reiterated the importance of General Learner Outcomes as an important set of goals for standard-based learning. These outcomes are as follows: “The ability to be responsible for one’s own learning; the understanding that it is essential for human beings to work together; the ability to be involved in complex thinking and problem solving; [and] the ability to recognize and produce quality performance and quality products” (Hawai‘i State Performance Standards Review Commission, 1999, p. 7).

An important national conference held in 1999 by the Council for Basic Education in collaboration with the Johnson Foundation with key stakeholders nationwide, the “Wingspread

Conference,” helped Hawai‘i change agents “identify the key issues related to the implementation of the Hawai‘i Content and Performance Standards in a standards-based system” (Hawai‘i Department of Education, 2005b, para. 7). Prominent among these key issues was a recognition of the need to enhance teacher support and improve alignment of assessments with standards.

In addition to participating in the conference, the DOE also consulted “guidelines developed for the U.S. Department of Education and the Council of Chief State School Officers” (Hawai‘i State Auditor, 2001, p. 3). All of this work culminated in the final drafting of revised content standards by June 1999, which were adopted by the BOE during August 1999. That same month, the DOE began writing performance standards (Hawai‘i State Auditor, 2001, p. 3).

During the 2000 session, the Hawai‘i State Legislature passed Senate Concurrent Resolution 57, which requested the Legislative Auditor “to review and assess the Department of Education’s development of educational standards for public schools statewide to ensure that Hawai‘i’s standards for competency in the basic educational skills are on par with the standards of other states” (Hawai‘i State Legislature, 2000, para. 5). The resolution also mentioned that a primary motivation for requesting this study was that “a national study on the development of educational standards by states, indicat[ed] that Hawai‘i’s overall grade was D-minus and ranked 44 in its English, History, Geography, Science, and Math standards” (Hawai‘i State Legislature, 2000, para. 3). The study referred to appears to be the 1999 edition of the *Education Week* annual national review, *Quality Counts*. The 1999 *Quality Counts* assessment gave the state a D- for standards and assessments in large part because “the state got a failing grade for the clarity and specificity of its standards from the American Federation of Teachers” (Education Week, 1999, para. 1).

The Hawai‘i State Auditor has a policy of not responding to single body resolutions requesting reports from the state Senate or House alone. It does, however, respond to concurrent resolutions that have passed both the House and Senate, as Senate Concurrent Resolution 57 did during the 2000 session. To facilitate its analysis, the Auditor contracted with a firm nationally-known in the field of standards, McREL. McREL was tasked to assess “each content standard for coherence, clarity, and comprehensiveness” (Hawai‘i State Auditor, 2001, summary section para. 3). The report summary defined their use of the terms as follows:

Coherence refers to how well each standards document is organized so that the material will make sense to the reader and will be easy to use. Clarity refers to how clearly the standards describe the concepts and skills that students should learn and can demonstrate. Comprehensiveness refers to whether the concepts and skills address significant concepts and skills for each subject area, whether the concepts and skills are presented at the appropriate level of difficulty, and whether the content and skills described are specific enough to be meaningful (Hawai‘i State Auditor, 2001, summary section para. 3).

The standards were determined to be generally “coherent and well organized” in the core academic areas of language arts, mathematics, science, and social studies, although “the level of specificity of some benchmarks is inconsistent” (Hawai‘i State Auditor, 2001, summary section para. 3). Improvement of the clarity of the standards was recommended. While the core subject matter area standards covered “significant concepts and skills,” it was noted that they could nevertheless “benefit from the inclusion of skills and concepts found in highly regarded state and national documents” (Hawai‘i State Auditor, 2001, summary section para. 6). Other more concrete, specific revisions were urged as well. Mathematics received special praise; “the job is nearly complete” (Hawai‘i State Auditor, 2001, p. 36).

The Auditor’s examination of the DOE’s strategic plan for the implementation of standards (Hawai‘i Department of Education, 1999a) also noted that they field tested standards-based “student assessments in reading, writing, and math” on 51,000 students in May 2000 for a statewide rollout during Spring 2001 (Hawai‘i State Auditor, 2001, p. 6). This instrument would be complemented “with a portion of the Stanford Achievement Tests, 9th edition” (Hawai‘i State Auditor, 2001, p. 6). As assessment would be linked to standards, so, too, would professional development and curricular support, according to Superintendent Paul Le Mahieu’s address at the Annual Leadership Conference in August 2000. The audit noted that concrete steps were beginning to be taken in this area.

In 2002, the Hawai‘i State Performance Standards Review Commission convened again under the mandate of Hawai‘i Revised Statutes 302A-201, assisted by “ample logistical and technical support” from Pacific Resources for Education and Learning (Hawai‘i State Performance Standards Review Commission, 2003, p. 6). They issued their final report in January 2003, which made a wide variety of findings and recommendations designed to support

the ongoing improvement of the reform model. Among the most salient was that “the DOE had made appropriate revisions suggested in the state audit of the HCPS II’s core content areas (language arts, mathematics, social studies, and science), conducted by the Mid-continent Research for Education and Learning” (Hawai‘i State Performance Standards Commission, 2003, p. 2). The commission also noted that “performance standards are in the final stages of development” (Hawai‘i State Performance Standards Commission, 2003, p. 2). Furthermore, the BOE and DOE came under criticism for failing to establish a system

to attend or respond to the seven recommendations of 1998 PSRC report. This has made it difficult for the current Commissioners to evaluate the quality of the BOE’s and DOE’s responses to the PSRC’s first recommendations” (Hawai‘i State Performance Standards Commission, 2003, p. 3).

In spite of a variety of concrete criticisms, the report did cite the Standards Implementation Design System and the Strategic Implementation Plan as valuable tools for establishing standards on a firmer footing (Hawai‘i State Performance Standards Review Commission, 2003, p. 49). Finally, the report issued in January 2003 continued to vigorously support the notion that standards-based education would “produce consistently high results for all children across Hawai‘i ” (Hawai‘i State Performance Standards Review Commission, 2003, p. 5). While the report was generally positive, it stated that HCPS II was still “a ‘work in progress’ when it came to direct linkages to the General Learner Outcomes, clear criteria or rubrics, samples of student work, and strategies to meet diverse learner needs” (Hawai‘i State Performance Standards Review Commission, 2003, pp. 21-22).

After working with the Auditor to identify shortcomings in HCPS II, McREL was contracted by the DOE to implement their findings by revising the standards to create HCPS III. Over the course of 2003–2005, McREL once again supported standards development in Hawai‘i by working with the DOE to develop “recommendations for revision of Hawai‘i state standards in English language arts, mathematics, science, social studies, the arts, educational technology, health, physical education, career and life skills, and world languages” with particular attention given to the development of performance standards (Mid-continent Research for Education and Learning, 2009, para. 6). In addition, “revisions included a consistent grain size for standards and benchmarks, the use of Marzano’s New Taxonomy to develop benchmarks, and alignment with

instructional time available in the classroom” (Hawai‘i State Performance Standards Review Commission, 2006, p. 15).

During this period, the DOE also moved to address the commission’s concern from their 2003 report for enhanced standards-based teacher training by developing a train-the-trainer model in which “state level staff train district/complex area cadre who then work with schools” (Hawai‘i Department of Education, 2006, p. 15). DOE also developed a “professional development series of modules, entitled Transforming Our Teaching and Learning (TOTAL)” (Hawai‘i State Performance Standards Review Commission, 2006, p. 16), and DOE produced a video shown on Olelo public access television and the Internet (Hawai‘i Department of Education, 2006, p. 15).

External policy developments during this period also impacted standards-based education. Most notably this is included Act 51, Session Laws of Hawai‘i 2004, which “replaced the Standards Implementation Design (SID) school improvement plan with the Academic and Financial Plan which required closer alignment of funds with student achievement of the HCPS” (Hawai‘i State Performance Standards Review Commission, 2006, p. 16). Recommendations for the ongoing improvement of the standards culminated in BOE approval between April and August 2005 of the Hawai‘i Content and Performance Standards III in nine content areas. These documents include K–12 content standards, grade level/course benchmarks, a sample performance assessment for each benchmark, and a rubric that enables teachers to judge the performance of students with respect to the expected level of rigor of the benchmark (Hawai‘i State Performance Standards Review Commission, 2006, p. 15).

Among the reasons for the transition from HCPS II to HCPS III were reports from teachers “that HCPS II lacked the specificity by grade level and courses, was unrealistic—due to the sheer number of standards—to teach and students to learn in one year, [and] lacked performance standards (measures of quality)” (Hawai‘i Department of Education, 2006, p. 2). Other key motivators for change included external reviews from nationally recognized experts, and the 2003 PSRC report.

Among the national experts whose opinions seemed to carry some weight were those of Dr. W. James Popham of the University of California at Los Angeles, who gave a presentation to Superintendent Patricia Hamamoto and staff in Honolulu on April 17, 2003. In this presentation, Dr. Popham (2003) urged adoption of what he termed “instructionally sensitive NCLB tests.”

These would “(1) measure only a modest number of super-significant curricular aims, (2) supply lucid teacher-palatable descriptions of what’s to be assessed, and (3) provide instructionally informative results so that a student’s mastery of each assessed curricular aim can be determined” (Popham, 2003, para. 1). Absent achievement of these objectives, Popham argued, states risk “failure to make adequate yearly progress on tests whose very nature makes such progress essentially unattainable.” The solution he suggests is the division of existing standards into those that are “desirable, very desirable, and essential” and to “focus on only the essential standards” (Popham, 2001, pp. 30-36).

In response to the feedback from all of these sources, the DOE’s Office of Curriculum, Instruction and Student Support (OCISS) developed several criteria that would be used to guide the transition from HCPS II to HCPS III. Presented to the Board of Education on March 14, 2006, these were to

- Provide specificity of expectations by grade level and courses . . .
- Communicate expectations for ALL students . . .
- Identif[y] grade level and course standards . . . implementable . . . within the instructional time frame.
- Be comparable to national and highly regarded state standards.
- Provide rubrics to assess student’s learning which are based on the taxonomic levels of thinking (rigor)

(Hawai‘i Department of Education, 2006, p. 7).

By 2006, it was again time for the Hawai‘i State Performance Standards Review Commission to reconvene, as per statute. As in 2003, they issued a thorough report (Hawai‘i State Performance Standards Review Commission, 2006) with numerous findings and recommendations. Perhaps the two most notable ones were that “the 2006 PSRC recommends that the Hawai‘i Content and Performance Standard III has undergone rigorous development and that it need not be modified at this time” (Hawai‘i State Performance Standards Review Commission, 2006, p. 5) and that “national organizations have found the HCPS to be valid and rigorous” (Hawai‘i State Performance Standards Review Commission, 2006, p. 4).

In the course of its three successive versions, the Hawai‘i Content and Performance Standards have indeed undergone extensive review by nationally-respected external entities for well over a decade. In 1995, one of the leading proponents of standards-based education, the

American Federation of Teachers led by then-president Albert Shanker, issued the first in an annual series of “comprehensive [analyses] of education standards in the states” (American Federation of Teachers, 1999, p. 2). This report, *Making Standards Matter*, would become an influential annual review of the state of standards in the states, one which continued through 2001 (American Federation of Teachers, 1996, 1997, 1998, 1999, 2001). *Making Standards Matter* sought to evaluate whether or not state standards in four core academic subjects (English, math, science, and social studies) were clear and rigorous, and to briefly examine their relationship to assessments, student incentives, and academic intervention. The report suffers from an inconsistent reporting format that changed over time, making a longitudinal comparison somewhat difficult. See Table 1 for the reports for Hawai‘i from 1995 through 2001.

Table 8.1

American Federation of Teachers' *Making Sense of Standards* Report Card for Hawai'i Standards

Year	English	Mathematics	Science	Social Studies
1995	borderline	between border-line and exemplary	between border-line and exemplary	Borderline
1996	borderline	between border-line and exemplary	between border-line and exemplary	Borderline
1997	borderline	between border-line and exemplary	between border-line and exemplary	Borderline
1998	"no reading basics or writing conventions" in elementary and middle; no writing conventions in high school; "vague reading comprehension" all levels	"vague content" except for middle level, which was "clear, specific, and grounded in content"	"unclear and vague content"	"no world history; vague U.S. history"
1999	standards not "clear and specific enough to meet AFT crite-			

	ria”; “has or will have an assessment system aligned with the standards”; standards not “given in the four core areas”; “standards not given in the four core areas at least once at each level”; no “documents describing the performance needed to meet the standards.”			
2000	data not available			
2001	“not clear or specific at any level”	“clear and specific at three levels”	“not clear or specific at any level”	“not clear or specific at any level”

Arguably the other most significant ongoing annual national review of the states’ educational standards has been that conducted by the national newspaper of record for K–12 education, *Education Week*. This review, *Quality Counts*, began in 1997 and continues to the present day. The initial 1997 edition mentioned that work on standards-based education began in Hawai‘i in 1994. It also quoted the chair of the state’s Goals 2000 Panel on Assessment, Teaching, and Learning, Lois-ellin Datta, that she felt “it is doubtful that many teachers know

about the new standards, have copies of them, and have done much to link specific curriculum elements and assessments to the framework” (Trotter, 1997, p. 96). Instead, the report stated that “the school system considers its most important recent reform to be the movement to school- and community-based management” (Trotter, 1997, p. 96). In 1998, it was noted that, while standards were in their third year, “there still is no funding to develop the accompanying assessment” and that “the standardized test used in math and reading is not aligned to state standards” (Manzo, 1998, p. 138). In 1999, the state’s grade from *Quality Counts* dropped considerably to a D- : “the state got a failing grade for the clarity and specificity of its standards from the American Federation of Teachers.” (Education Week, 1999, p. 140)

While the state’s grade improved only marginally in 2000, that year’s report did mention Superintendent LeMahieu’s concerted effort “to make Hawai‘i’s content and performance standards the centerpiece of the education system” (Jacobson, 2000, p. 112). That year’s assessment also made reference to the criticisms of the PSRC 1999 report: vagueness, lack of standards for certain content areas, and an absence of performance standards. Further noted was LaMahieu’s call for a system-wide needs assessment. Delivered in February 1999, it cited the “need to improve standards-based learning” in addition to five other core needs (Jacobson, 2000, p. 112). In conjunction with the commission’s report, the two documents were “being used to point the department in the direction of standards-based reform” (Jacobson, 2000, p. 112). Steps to come included the development of performance standards and piloting that year of the Hawai‘i Assessment Program of Outcomes.

By the 2001 edition of *Quality Counts*, Superintendent LeMahieu was able to claim that “we’re starting to gain some serious momentum” (Jacobson, 2001, p. 130). “Standards alliance teams” fanned out from the DOE to provide training in standards implementation at nearly half of the DOE schools by the time of the report (Jacobson, 2001, p. 130). Furthermore, that year each school was “expected to turn in its first ‘standards implementation design’, a standards-based document that replaces various other school-level planning activities” (Jacobson, 2001, p. 130). As had been the case since the inception of the *Quality Counts* review, Hawai‘i’s assessment practices remained an area in need of improvement, which was being addressed by “the development of a new program of criterion-referenced assessments aligned with the state standards” (Jacobson, 2001, p. 130).

Not until HCPS III was adopted by the BOE in 2005 did Hawai‘i’s score on the *Quality Counts* report rise above the C and D level, to a B+ for the years 2005 and 2006. However, since *Quality Counts* is typically issued in January of each year, and HCPS III was adopted by the BOE between April and August 2005, Hawai‘i’s much-improved grades from *Education Week* between 2003–2005 may have been an increasingly positive response to the performance standards that were released after HCPS II was approved by the BOE in August 1999.

Table 8.2

Education Week Quality Counts Hawai‘i Standards and Assessments Report Card

Year	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Grade	B	C	D-	D+	D	D-	D+	C+	B+	B+

Other important external reviews of Hawai‘i’s standards over the years have come from the Thomas Fordham Foundation, the American Federation of Teachers (distinct from its previous *Making Standards Matter* review), Achieve, Inc., and the Hoover Institution.

Like the American Federation of Teachers and *Education Week*, the Thomas Fordham Foundation has a relatively long history of analyzing state standards. This took the form of either analyzing specific subject matter areas across the country or examining a group of core academic subject matter areas across the country. For example, in 1997 Hawai‘i’s HCPS I English standards were reviewed. Their report was ambiguous. Fordham determined that the standards “do not express high academic standards” and yet elsewhere in the report called them “clear” and “demanding” (Stotsky, 1997, pp. 2, 5). In 1998, Fordham issued a number of reports on individual subject matter areas which were later consolidated into a single report. The 1998 report of the states’ history standards found that in Hawai‘i “no standards were available for review” (Saxe, 1998, p. 29). Similarly, geography was graded “incomplete.” What they could find about geography was “embedded in Hawai‘i’s social studies framework” and judged “neither comprehensive nor rigorous” (Munroe and Smith, 1998, para. 1). Mathematics standards in 1998, graded on “clarity, content, reason, and negative qualities,” were called “vague” and given no points at all in the categories of clarity and reason (Raimi and Braden, 1998, p. 30).

The bright spot was science. Even though Hawai‘i science standards were criticized for suffering “from the limitation of lists” and failure to emphasize “the connectedness that is so

essential to science,” they were still given an A grade and tied for second place in the nation (Lerner, 1998, pp. viii, 21). In the cumulative report issued later that year, Hawai‘i received a combined score of D+ for its F grades in English and Math and its A in Science (Finn, Petrilli, and Vanourek, 1998). In spite of such a low grade, however, Hawai‘i’s score was still slightly above the median, coming in at 21st place.

In Fordham’s second multi-disciplinary nationwide review, released in 2000, Hawai‘i did worse, coming in 44th place on a review of HCPS II. The report card yielded an F in English, geography, and history, a C in Math, a D in science, and a D- cumulatively. A common complaint was vagueness, too much breadth, and a lack of specifics. The drop in the science grade from an A to a D was a dramatic change, although the analysis commented positively that “a competent committee assigned to flesh out” the science standards might result in “one of the finest science standards in the nation” (Finn and Petrelli, 2000, pp. 49-50).

In 2003, U.S. history standards were examined by Fordham nationwide. As in 2000, Hawai‘i received an F. Fordham noted that Hawai‘i’s standards reflected “the outlook of ‘Meeting the Challenge: A Framework for Social Studies Restructuring’ published in 1992 by the National Council for the Social Studies,” a model that was apparently none too popular with Fordham. The report further criticized Hawai‘i’s U.S. history standards for an “ambivalent and almost anti-intellectual approach to historical knowledge” (Stern, Chesson, Klee and Spoehr, 2003, p. 36).

In 2005, Fordham’s analysts turned their attention to state math standards nationwide. Here, Hawai‘i’s math standards grade reverted from a C back to the F it had originally received in Fordham’s first national report on the subject in 1998. The 2005 Fordham math report blasted Hawai‘i’s standards saying, “There is little that can be salvaged in Hawai‘i’s mathematics standards” (Klein, Braams, Parker, Quirk, Schmid, Wilson, Finn, Torres, Braden and Raimi, 2005, p. 56). In math, as with U.S. history mentioned above, a portion of Fordham’s negative appraisal stemmed from their dissatisfaction with the models promulgated by the national disciplinary organizations. In a response defending their HCPS II math standards, the DOE noted that they were “modeled after National Council of Teachers of Mathematics (NCTM) Principles and Standards for School Mathematics (PSSM) 2000” (Hawai‘i Department of Education, 2005a, para. 2). States that built on this organization’s work were criticized by Fordham for an “unfortunate embrace of the advice of the National Council of Teachers of Mathematics” (Klein,

Braams, Parker, Quirk, Schmid, Wilson, Finn, Torres, Braden and Raimi, 2005, p. 7). In its further defense, the DOE noted that “while California received the Fordham Institute’s highest rating and Hawai‘i received one of its lowest, both states scored equally well on the 2003 NAEP mathematics assessment for grades 4 and 8” (Hawai‘i Department of Education, 2005a, para. 4).

In 2005, Fordham also looked at English and science standards. In science, Fordham’s earlier optimism that Hawai‘i’s science standards could be “among the finest in the nation” with a little improvement had apparently fallen by the wayside. Hawai‘i’s science standards were called “bloated,” “poorly organized,” “with a quality of writing . . . so weak that one wonders if there has even been a single proofreading” (Gross, Goodenough, Lerner, Haack, Schwartz, Schwartz and Finn, 2005, p. 35). Hawai‘i’s grade in that subject dropped from a D in 2000 to an F in 2005 (Gross, Goodenough, Lerner, Haack, Schwartz, Schwartz and Finn, 2005, p. 20). Unlike math, the grade for Hawai‘i’s English standards improved from 2000 to 2005, from a D to C. Furthermore, Fordham’s report said that, overall, the addition of performance standards to HCPS II “considerably strengthen[ed] understanding of the 1999 standards” (Stotsky and Finn, 2005, p. 39). Nevertheless, they were still judged in the main to be “vague, undemanding, and unmeasurable” (Stotsky and Finn, 2005, p. 39).

Fordham rated state world history standards in 2006. Hawai‘i did poorly yet again, earning an F for standards that were “truly weak” and presented in such a way so that “it is not clear that Hawai‘i’s students will learn anything about world history” (Mead, Finn and Davis, 2006, p. 43-44). Hawai‘i continued to rank poorly in Fordham’s 2006 nationwide assessment of standards in core academic subject areas, receiving an F and a ranking of 47, down from a grade and ranking of D- and 44 in the previous report in 2000, and a D+ and 21st place finish in 1998. Hawai‘i was given a C in English and an F in all other remaining subjects: math, science, U.S. history, and world history, although the report held out hope that “more specificity would go a long way” (Finn, Petrilli and Julian, 2006, p. 62).

The American Federation of Teachers quit publishing their annual *Making Standards Matter* series in 2001. In 2006, however, they revisited the issue of the alignment of state tests required under *No Child Left Behind* with state standards. They identified “strong” criteria for content standards in math and science but not reading. In Hawai‘i however, they didn’t see assessment aligned with standards in any of these subjects, making Hawai‘i one of only nine states to earn a 0% in this category (American Federation of Teachers, 2006, pp. 8, 13). This

judgment, however, was probably because American Federation of Teachers found that “there are no test documents available online that identify the standards to be assessed by the states,” not because such instruments didn’t exist (American Federation of Teachers, 2006, p. 1). In fact, contrary to their claims, the DOE had already rolled out standards-aligned tests for grades 3, 5, 8, and 10 in 2002 (Jacobson, 2003, p. 125).

In any event, this perception has perhaps been laid to rest by “new, grade-level specific tests that are closely aligned with the latest Hawai‘i Content and Performance Standards III. The new tests, developed and administered by American Institutes for Research (AIR), provide a better measure of how well students are learning what they are expected to learn in reading and mathematics in grades 3 through 8 and grade 10” (McClelland, 2007, para. 1-2).

Achieve, Inc. is a business-oriented education reform organization that focuses on helping states’ graduate high school students who are “college and work ready.” In the early 2000 decade, they offered the business community their primary vehicle to stay engaged consistently with their preferred vision of education reform. For example, in 2004, they compared “the graduation exams in six states - Florida, Maryland, Massachusetts, New Jersey, Ohio, and Texas” to assess the tests’ “content and rigor” and the appropriateness of their cut scores (Achieve, Inc., 2006, p. 1). The resulting report, *Do High School Graduation Exams Measure Up?*, drew the attention of the DOE as a means of evaluating one of their primary assessment instruments. In 2005, the DOE asked Achieve, Inc. to utilize the same methodology to compare Hawai‘i’s “grade 10 Hawai‘i State Assessment in reading and mathematics with the six states’ exams” (Achieve, Inc., 2006, p. 1). Their report on Hawai‘i concluded that “the reading test is generally less demanding than those of other states, [while] the mathematics test contains considerably more challenging content than tests from other states” although “neither assessment is overly rigorous” (Achieve, Inc., 2006, p. 1).

More specific findings included the sense that “Hawai‘i’s reading test puts a premium on comprehension of informational text” over literature, which Achieve claims is preferred by colleges and business. However, the expository prose given emphasis in the testing instrument tended to be of “relatively low cognitive complexity,” making it “among the least rigorous” of the states tests’ they examined (Achieve, Inc., 2006, p. 2). Cut scores for “meets proficiency” in reading were comparable to those of other states, although they opined that this was nevertheless

a relatively low bar, more comparable to ACT's test for 8th and 9th graders than ACT's test for college admissions (Achieve, Inc., 2006, p. 2).

In math, Hawai'i's test was considered "well balanced" and "rigorous"; in fact, "more rigorous than all but one of the states analyzed in Achieve's earlier study" (Achieve, Inc., 2006, p. 2). They gave special praise for Hawai'i's emphasis on advanced algebra, especially in light of their sense "that Algebra II is fast replacing Algebra I as the gatekeeper course for success in college and the high skills workplace" (Achieve, Inc., 2006, p. 2-3). They also found "the content demand" to be "higher than those in other states," while "the test items themselves are less cognitively demanding" (Achieve, Inc., 2006, p. 3). On balance, this put the cut scores for "meets proficiency" in math slightly above those of the other states they looked at. As with reading, however, a caveat was added: meeting proficiency in this test was equivalent to 8th grade math "in most other countries" (Achieve, Inc., 2006, p. 3).

Achieve recommended that "the overall rigor of the grade 10 reading test" be raised, the cut score of the reading test be raised over time, and "the level of performance demand of the mathematics items" be raised (Achieve, Inc., 2006, p. 3).

In another important external review of Hawai'i's standards made by the Hoover Institution in 2005 comparing the "strength of state proficiency standards," Hawai'i ranked 6th out of 40 states, receiving a B grade (Peterson and Hess, 2005, p. 53). As the study co-author Frederick M. Hess remarked, "We want to be sure that states that are really stepping up to the challenge like Hawai'i are being recognized" (Hess cited in Essoyan, 2005, para. 8).

"States such as California, Kentucky, Maryland, Massachusetts, North Carolina, and Texas had all begun to implement standards-based reform in the 1980s using their own funds" (Hamilton, Steecher and Yuan, 2008, p. 24). While not among these pioneers, Hawai'i does appear to have been ahead of the curve on standards-based education in the United States. Passage of Act 334, Session Laws of Hawai'i 1991, created the Hawai'i Commission on Performance Standards and set the state on the road to implementing this reform model prior to the passage of the federal *Goals 2000* legislation and well before most of the disciplinary organizations had even begun drafting model standards. Furthermore, Hawai'i was the first state to receive *Goals 2000* funding for work on standards (*A Goals*, 1998, para. 6). Under Superintendent Paul Le Mahieu's leadership, the DOE made a concerted effort "to make Hawai'i's content and performance standards the centerpiece of the education system"

(Jacobson, 2000, p. 112). Superintendent Patricia Hamamoto continued this commitment during her tenure. In spite of this early start, however, Hawai‘i has never been among those states consistently lauded by external reviewers as having exemplary standards across the board. One early bright spot was the initial reception of HCPS I science standards by the Fordham Institute in 1998.

Nevertheless, it should be noted that Hawai‘i’s efforts to continually refine the state standards documents have certainly born fruit. Since HCPS III was released in 2005, Hawai‘i has received consistent B+ ratings from the *Education Week Quality Counts* survey, with particular praise directed at English standards and middle and high school level social studies/history standards (Quality Counts, 2005, para. 3).

In fairness to Hawai‘i, many external reviewers were harsh judges of many other states’ efforts in the early years of the movement. For example, Hawai‘i’s overall grade of D+ from Fordham in 1998 was still good enough for a 21st place ranking (Finn, Petrilli, and Vanourek, 1998).

In this chapter I outlined the political context that made Hawai‘i one of the early adopters of standards-based education by examining a number of important local initiatives that took place during the late 1980s and early 1990s in the context of relevant and comparable initiatives occurring on the mainland United States. Having set the stage in this way, I was then able to closely examine the historical evolution of numerous iterations of standards in Hawai‘i. Finally, I summarized the local and national evaluation literature revolving around Hawai‘i’s standards, which gave Hawai‘i a mixed grade.

CHAPTER 9. CONCLUSION. PART 1

In this dissertation, I have attempted to answer three key research questions: 1) Why did policy makers and other interest groups come to embrace standards-based education as the key to educational reform efforts? 2) How did standards-based education become embedded in the curriculum, assessment, and accountability systems throughout the nation? 3) What has been its lasting impact, not only in education policy, but on society and the planet as a whole?

In chapters 2-4, I conducted an abbreviated literature review, laid out my methodology, and defined my key analytical terms. In chapters 5 through 8, the historical chapters, I attempted to answer the first two of my key research questions.

In chapter 5, I examined how elite business interests made common cause with the leading lights of what has been called the “new right” during the late 1960s and 1970s to create a coalition that, while their interests were sometimes in conflict, was nevertheless instrumental in the eventual creation of standards-based education. During this period, we also saw the beginning of a rightward shift in the Democratic party as well, a faction that would join the business-right coalition on education reform issues that would later coalesce into standards-based education, making these concerns more bipartisan than they are portrayed in such influential works as Berliner and Biddle (1996) and Apple (2006).

In chapter 6, I analyzed a flurry of reports on educational policy reform issued during the 1980s and early 1990s, as well as some ground-breaking concrete examples of reform in practice initiated during the same period, with a special focus on the incredibly influential *A Nation at Risk* report. I chose to focus on these reports because they established much of the rhetoric, proposals, and institutional linkages that would later become standards-based education. Or, more succinctly, “whoever decides what the game is about also decides who gets into the game” (Schattschneider cited in Callahan, 1999, para. 2). These reports decided what the game was all about.

In chapter 7, I provided a detailed history of federal law and policies regarding standards-based education during the George H.W. Bush and Clinton presidencies. Bush’s *America 2000* legislation failed to pass. Resurrected largely unchanged by Clinton as *Goals 2000*, it passed in 1994. With the passage of *Goals 2000* and the *Improving America’s Schools Act* (the Elementary and Secondary Education Act reauthorization) in 1994, standards-based education became a settled and integral part of local, state, and federal educational policy.

In chapter 8, I offered case study of how one state, Hawai‘i, assimilated standards-based education. I charted this from its beginning as an early adopter nation-wide to the present day. It sprang from numerous sources. One of which was the political clout of then Lt. Governor Ben Cayetano and Superintendent of Education Charles Toguchi (two of four people known informally at the time as the “four horsemen” for being outspoken state legislators, a group which also included Neil Abercrombie and Clayton Hee). Cayetano and Toguchi were able to make significant political capital out of the notions of “accountability” and decentralized, school-centered governance that were so popular at the time. Another major impetus was a 1988 report commissioned by the Hawai‘i Business Roundtable and written by Berman Weiler Associates, the same firm that had already written influential reports on Minnesota and California education reform. Many of these attempts at reform in Hawai‘i proved to be short-lived, especially the radical decentralization efforts of Toguchi’s *Project Ke Au Ho*. Nevertheless, you could also argue that school-community based management eventually led to charter schools in Hawai‘i, so that would be one enduring result. Another one would result from the process set in motion when the Hawai‘i State Commission on Performance Standards was established by law in 1991. That body had draft standards by 1993 and completed content and performance standards by 1994. These would be the first of three successive iterations of content and performance standards, a set of documents that continues to be a work in progress today.

In chapter 9, this conclusion, I shall attempt to answer my third key research question: What has the lasting impact of standards-based education been, not only in education policy, but on society and the planet as a whole? I hope to answer this question by dividing my answer into several parts in this conclusion.

After this introductory part, the remaining parts will be 2) a survey of the national evaluation literature (largely critical) of standards based education in America, 3) an analysis of recent developments like the Common Core State Standards Initiative, Achieve Inc’s America Diploma Project, and other initiatives which have been nationalizing the standards movement in recent years at a rapid pace with relatively little resistance, and 4) what I hope may be considered a novel perspective on standards-based education, one largely at variance with its many advocates. This final part of my conclusion will be anchored in an analysis of 1) disparities between notions of weak and strong nation-states in the ongoing debate within neoliberalism as they apply to education, 2) the complicity of standards-based education with mainstream

assumptions that resource-devouring, highly technologized, and urbanized societies can, should, and will continue indefinitely, and 3) the ultimate ends of education, which have become far more instrumental and economically oriented under standards-based education than they were under traditional holistic progressive views on the subject.

CHAPTER 9. CONCLUSION. PART 2. NATIONAL EVALUATION LITERATURE

The strengths and weaknesses of standards-based education have been debated for nearly two decades in the national evaluation literature. In this part of the conclusion I will argue that the model has been adopted in large part because states are under political and economic pressure to continually chase the slowly but significantly increasing federal share of state and local education budgets. I will also seek to clarify the model by reference to some of the simplest, most subtle, and most prominent definitions of standards-based education, including those from Diane Ravitch (Olson 1995), the National Academy of Education (McLaughlin, Shepard, and O'Day, 1995), and the National Council on Education Standards and Testing (Ravitch, 1995b). After providing these definitions, I will briefly examine the major shortcomings most often cited by critics of the model.

When standards-based education first started coming into being, the federal share of local education was 5.7% (1990-1991). By 2005, after it had become entrenched in federal law, it was still only 8.3%, and yet that money became a major driver of educational policy over the last two decades at the state and district levels as well (United States Department of Education, 2005, p. 2). This is what has been called the “revenue theory of costs; each institution raises all the money it can and then it spends all it raises in order to maximize its prestige and quality” (Lewis and Dunder, 2001, p. 138).

As the 1990s drew to a close, every state except Iowa had drafted standards. By the time President Bush signed the No Child Left Behind Act into law on January 8, 2002, even Iowa had promulgated standards and standards-based education became an even more settled and integral part of local, state, and federal educational policy than it had been under the Clinton administration.

Along with charter schools, school choice, and vouchers, standards-based education has been one of the leading and most enduring educational reform models in America over the last few decades. As “school delivery” and “opportunity-to-learn” standards regarding resources and equity fell to wayside, the focus shifted in to two elements that remain with us today, “content” and “performance” standards. Content standards came to mean what students should know in each academic topic in each grade, while performance standards came to indicate what constitute adequate mastery of the content standard.

By the mid-1990s, people and organizations began formulating important characterizations of what they felt constituted quality standards. Education historian and then prominent standards advocate Diane Ravitch saw three salient features: “they are clear and measurable; they focus on cognitive learning, not affective traits; and they are usually based on traditional academic disciplines” (Olson, 1995, para. 13).

In 1995, the National Academy of Education endorsed two guiding principles for standards:

[1] Because there is not one best way to organize subject matter in a given field of study, rigorous national standards should not be restricted to one set of standards per subject area.

[2] Content standards should embody a coherent, professionally defensible conception of how a field can be framed for purposes of instruction. They should not be an exhaustive, incoherent compendium of every group’s desired content (McLaughlin, Shepard, and O’Day, 1995, p. xviii).

The formal body created by statute to address the issue, the National Council on Education Standards and Testing, said that

[1] Standards must reflect high expectations, not expectations of minimal competency.

[2] Standards must provide focus and direction, not become a national curriculum.

[3] Standards must be national, not federal.

[4] Standards must be voluntary, not mandated by the federal government.

[5] Standards must be dynamic, not static (Ravitch, 1995b, p. 140).

Certainly, the model has never been short of critics. Some see it as shortchanging the traditional progressive means and ends of education (Kohn, 1999). Some see more value in a vibrant, resourceful, flexible, and democratic school culture (Meier, 2000). Some lambaste the “one-size-fits-all approach” (Ohanian, 1999). Some concede it may be seen as an “autocratic, regimented throw-back to factory-model approaches to school, where students are forced to regurgitate expert-prescribed sets of facts or face failure” (Thompson, S., 1999, p. 46).

A perceived lack of concern for gender, race, and class differences worries a number of analysts (Berlak, 1995; Marzano and Kendall, 1996; Purpel, 1995; White House Initiative on Educational Excellence for Hispanic Americans, 1999; Horn, 2004). Others took the opposite

tack and worried that the conventional stories and historic figures of America were unduly neglected by the new standards, echoing Lynn Cheney's critique of the initial history standards (Cheney, 1994). Given so many diverging viewpoints, many have urged standards developers to focus on common values and learning objectives (Darling-Hammond, 1997; Darling-Hammond and Falk, 1997b; Falk and Ort, 1998).

Furthermore, some see rigid, detailed, highly structured standards as a deskilling of teachers' intellectual work and professional practice in pursuit of "teacher-proof" learning environments (Rothstein, Jacobsen, and Wilder, 2008). It could be argued that standards are also part of a long-term business agenda to deskill intellectual and physical labor generally in Fordist and post-Fordist economies. This is especially deleterious in teaching because most great teaching is as much art, improvisation, and guild craft as science, and relies heavily on improvisation and rapid adaptation to the often tacit cues given off by students in the moment.

Some focus their attention on enhanced expectations of students (Hirsch, 1996), while others focus on enhanced standards-based learning (Kohn, 1999), perhaps through professional development (Alvarado, 1998), assessment (Darling-Hammond and Falk, 1997a, 1997b; Spalding, 2000), leadership (O'Neil and Tell, 1999; Resnick and Hall, 1998), or curriculum (Resnick and Resnick, 1991). For standards to be truly effective, they need to be considered as a part of a holistically designed system of teacher training, classroom instruction, professional development, assessment, and curriculum. Few states have succeeded in fully accomplishing this yet; perhaps none. Aligning standards with assessments is especially important and especially weak.

Although testing and accountability are an integral part of the standards-based education reform model (Tucker and Coddington, 2002), several aspects of it have come under fire. For example, the expense and technical challenges posed by creating valid and reliable tests often intimidate states and districts. Too often, they assess student achievement under standards regimes with previously existing testing instruments, even if these instruments are not entirely appropriate for the new standards. This can undermine public trust in the reform concept, especially when the tests have high stakes consequences, such as grade promotion or graduation (Falk, 2000, pp. 90-91).

Another big concern is the harm that may be caused by privileging high stakes testing, particularly for grade promotion, over multiple, diverse, and robust means of assessment

(International Reading Association, 1999; Koretz and Linn, 1996; National Council on Education Standards, and Testing, 1993; Darling-Hammond and Falk, 1997b). In fact, approximately half of the large urban school districts that link testing to grade promotion offer summer remedial classes. As Falk states “In many of them (Chicago, Houston, Oakland, Denver, Washington, DC, and New York City, to name just a few) attendance” is mandatory (2000, p. 92). Students are not alone in feeling the pressure against low test scores. Depending on the performance of their schools, teachers and administrators can enjoy bonuses—or face sanctions or even dismissal. In some jurisdictions, schools can even be shut down or privatized.

In light of the personal and professional stress and potential disruption to educational systems when standards are linked to high stakes testing, it is not surprising that states with milder consequences for low test scores (like Maryland and Maine) often note more positive benefits from their standards than do states and districts which take a more punitive approach (Clotfeller and Ladd, 1996; Elmore and Fuhrmann, 1996; Elmore, Abelman and Fuhrman, 1996; Firestone, Mayrowetz and Fairman, 1997; Murnane and Levy, 1996).

One of the most common complaints is the potential risk posed to holistic, individualized, multi-faceted, student-centered learning that can come from pressures to “teach to the test.” For example, an analysis of the assessment system in Kentucky (often seen as a leader in standards) found it hard for teachers to resist focusing “on whatever is thought to raise test scores rather than on instruction aimed at addressing individual student needs” (Jones and Whitford, 1997, p. 277).

In the perennially tough battle for resources, administrators are not always able to resist the temptation “to manipulate test results by changing the school’s student population or keeping certain students out of the testing pool” (Falk, 2000, p. 93; Clotfeller and Ladd 1996; Darling-Hammond, 1997; Smith and Rottenberg, 1991). In some cases, this can even rise to the level of potentially criminal activity (Hoff, 1999, para. 30). President George W. Bush’s education secretary Rod Paige came under scrutiny over these types of allegations related to his tenure as Houston schools chief.

Other oft-cited critiques of high stakes tests include their perceived unfairness to those with limited English proficiency, their tendency to commandeer the entire curriculum, and their tendency to foster investment in testing over learning (Falk 2000, pp. 93–99). These critiques

have led stakeholders in some states (such as Texas, Ohio, and Massachusetts) to try and abolish their high stakes tests (Hoff, 1999).

Some have argued that the participation of business in the development of standards has helped them socialize job training costs for the dominant service-clerical sector into public education (Horn, 2004, p. 28). Efforts to promote equity in school financing continue to be a struggle. While many have sought redress in the courts with some success, the record is not always a rosy one. In fact, with the forces of reaction going strong in the beginning of the 21st century, much progress is being lost. For example, in June 2002, the Appellate Division of the New York State Supreme Court ruled 4-to-1 to overturn a landmark decision from Manhattan Supreme Court Justice Leland De Grasse, which had been a major step forward in equity of funding for New York City schools (Ohanian, 2003, p. 736). In his opinion, Justice Alfred Lerner contradicted much of what business had been trying to say to the standards-based education movement for the previous 20 years:

According to Lerner, the state's responsibility is to provide sufficient education for pupils to “function productively as civic participants,” in things such as voting and serving on juries. The evidence at trial, he said, “established that the skills required to enable a person to obtain employment, vote, and serve on a jury, are imparted between grades 8 and 9.” He conceded that so little education might qualify a person for only a low-paying job. But he added, “society needs workers in all levels of jobs, the majority of which may very well be low-level” (cited in Gonzalez, 2002, para. 9-11).

As Ohanian has written, the “global economy needs these dropouts. If schools are successful in turning out swarms of well-educated youngsters, who’s going to flip our burgers and clean our toilets at minimum wage?” (Ohanian, 2003, p. 737). Standards, high-stakes testing, and accountability regimens have also helped fill the burgeoning school-to-prison pipeline as well, with America’s soaring incarceration rates. Since most of the states’ standards have a grade or grade span progression, they assume that all children develop at the same pace. This is contradicted by much of the literature in child psychology (Klein, 1984, 2002; Matthews, 1980; Piaget and Enhelder, 2000). While there may arguably be general developmental phrases, it seems doubtful that all children pass through them at exactly the same age. Even the progressive educational ideal of moving “from the simple to the complex” in relatively graduated steps, so

central to standards-based education, may not be in accordance with how many students learn either.

In the time since standards emerged, a cottage industry of think tanks, service providers, non-profits, and the like emerged to serve the model. There is even a sizable coterie of what one might call policy entrepreneurs who have spent much of their careers as technocrats or publicists in favor of standards-based education and other closely related ideas in educational policy reform. Plausible candidates for inclusion in this group might include Marc Tucker, Denis Doyle, Marsha Levine, Robert Marzano, Lauren Resnick, the early Diane Ravitch, Paul Peterson, Terry Moe, John Chubb, Chester Finn, Jr., and William Bennett, to name just a few of the more prominent ones. When all of these developments are considered collectively, an institutional inertia can be ascertained, one that is in favor of what already exists and how the policy elite hope to gradually improve upon it with technocratic tweaks – but never a wholesale rejection of the idea.

Support for national standards and assessment is strong today and pervades much of the bipartisan mainstream educational establishment. Early proponents began advocating for it many years ago (Tucker and Coddling, 1998; Kendall and Marzano, 1996; Barth, 2003). In fact, support for national standards and assessments was especially strong if proponents felt they could also be benchmarked against other strong-performing countries (Ravitch, 1995a; Achieve, Inc. 2007; Schmidt, Houang, and Shakrani, 2009).

Internationally cross-referenced data, like that collected by *Trends in International Mathematics and Science Study* (TIMSS) began in 1995, and international partnerships fostered by such initiatives as *Project to Increase Mastery of Mathematics and Science* (PIMMS), began at Wesleyan in 1979, also helped to foster an enhanced sense of the international repercussions of standards-based education among its many proponents in America. The beginnings of this trend can be seen as early as 1991, with the passage of a Senate bill approving national annual tests (Alvarez, 2001, para. 1).

Many prominent academics opposed national standards and assessments over this period too, however (Darling-Hammond, 1994; Resnick and Nolan, 1995), or demonstrated that nationally prominent textbooks (Apple, 1995) or the prestige of prominent national teacher education accreditation organizations implied de facto national standards. Such observations, however, were unable to stem the tide in favor of national standards. James Harvey, a member of

the commission that produced *A Nation at Risk*, recently expressed concern regarding the direction school reform has taken. Harvey noted that

educational decisions have been moved as far as possible from the classroom. Federal officials are now in a position to make decisions that would have been unimaginable even two years ago. They've established the criteria for disciplining schools, removing principals and teachers, and even defining appropriate curriculum for American classrooms (Ansary, 2007, para. 35).

CHAPTER 9. CONCLUSION. PART 3. THE MOVE TO NATIONAL STANDARDS

In spite of these concerns, many politicians and leading educational policy experts persist in their arguments for common national standards and even, eventually, national assessment. Haycock sounded the clarion call in 2003 when he wrote, “It’s a new century. It’s time to set aside our Industrial Age curriculum and agree on a common core curriculum for the Information Age” (Haycock, 2003, p. 2). In 2008, the National Research Council issued a report in favor of the idea as well, *Common Standards for K-12 Education? Considering the Evidence*.

Recently, Jane Hathaway, director of the Education Policy Center at the Urban Institute, has taken a close look at states’ standards and found them wanting: “too voluminous, superficial, and repetitive,” offering “little coherent direction for instruction” (Viadero, 2008, p. 11). To help address these perceived shortcomings, the National Academy of Education recommended the “federal government, in coordination with partnerships among state, universities, groups of teachers, scholars, and the private sector redesign . . . content standards—and the curricula, professional development that go with them—to present clear progressions for teaching and learning” (National Academy of Education, 2008, para. 7). In the interim between Obama’s election and inauguration, the National Academy of Education began encouraging a “national renaissance” to recover “the promise in standards-based education,” particularly by examining standards holistically in conjunction with assessments, professional development, and teacher training (Viadero, 2008, p. 11).

As Achieve, Inc. started taking on much of the work the Business Roundtable had been performing in educational policy reform efforts, they would go on to deepen business’ traditional support for standards and testing by co-sponsoring the National Education Summit on High Schools in 2005. Forty-five governors were in attendance, as well as numerous CEOs and K-12 educational leaders. A consensus emerged that schools were

not adequately preparing students for college and 21st century jobs. As a result of the Summit, 29 states joined with Achieve to form the American Diploma Project Network—a coalition of states committed to aligning high school standards, assessments, graduation requirements and accountability systems with the demands of college and the workplace (Achieve, Inc., 2007, p. 2).

As of 2007, Achieve, Inc. reported that 12 states had aligned their high school standards with “college and workplace expectations,” 27 states were in the process of doing so, 5 states planned to do so, and 6

states did not plan to do so (Achieve Inc., 2007, p. 9).

Over the last decade, building on such initiatives as the American Diploma Project of Achieve, Inc. and the Common Core State Standards Initiative, the full weight of the bipartisan education establishment has fallen in line behind national standards, perhaps with national curriculum and assessments to follow, possibly benchmarked against high performing countries. Members of this establishment include President Obama, Secretary of Education Duncan, National Governors Association, National Academy of Education, National Research Council, Council of Chief State School Officers, the National School Board Association, all 50 states (as members of the Common Core State Standards Initiative), many prominent academics, and key charitable foundations.

The Common Core State Standards Initiative, led by the National Governors Association and the Council of Chief State School Officers, has been particularly influential in the development of national standards of late (Common Core State Standards Initiative, 2010). On June 2, 2010, they released model K-12 “English-language arts and mathematics standards” which they “developed in collaboration with a variety of stakeholders including content experts, states, teachers, school administrators and parents,” which established “clear and consistent goals for learning that will prepare America's children for success in college and work” and urged their nation-wide adoption (National Governors Association, 2010, para. 1). Not surprisingly, one of the rationales was global competitiveness ideology. According to comments made by Georgia Governor Sonny Perdue in the press release accompanying the issuance of the new standards,

American competitiveness relies on an education system that can adequately prepare our youth for college and the workforce. When American students have the skills and knowledge needed in today's jobs, our communities will be positioned to compete successfully in the global economy (National Governors Association, 2010, para. 5).

As a symptom of how much momentum has gathered behind the movement for national standards, let us consider the case of the final state in America to adopt state standards: Iowa. On July 29, 2010 the Iowa State Board of Education “voted to adopt the Common Core State Standards as part of the Iowa Core,” again in large part because of global competitiveness ideology. In another press release announcing Iowa’s decision, the Iowa Board of Education president said

We want our students to not only be competitive in our own state, but in the nation and

the world. There is a sense of urgency in our state to address this new environment and enhance education to ensure our students are successful in college and the workforce. This is the right step toward making that happen (Iowa State Department of Education, 2010, para. 1).

Given the institutional stature of these proponents, many thoughtful observers think national standards and assessments are a distinct possibility in the near future. If this comes to pass, it will represent a profound change in the centuries-long tradition of local control over education in America.

CHAPTER 9. CONCLUSION. PART 4. THE LASTING IMPACT OF STANDARDS BASED EDUCATION

In this dissertation, I defined what I meant by “business,” “corporate leaders,” and related terms and also sketched the major ideological drivers of the historical period under review, by analyzing globalization, neoliberalism, and related terms. In the historical chapters, I accomplished a number of other objectives. I looked at how movement conservatives and the corporate elite combined with fundamentalist Christians and nascent corporatist democrats beginning with the Carter era to create the nucleus of interest groups that would later prove instrumental in coordinating an even wider variety of interest groups pressing forward with standards-based education reforms. From the start, these key change agents and the “movement” itself were far more bipartisan than they are typically portrayed in leading histories of education policy.

From there, I examined a decade of reports that provided much of the rhetoric and institutional linkages that, again, would lead towards standards-based education. Then, I examined the federal political and legal battles that eventually lead to the enshrinement of standards-based education in federal law during the Bush Sr. and Clinton years. With a brief aside to look at Hawai‘i as a case study of these forces in microcosm, I arrived at my conclusion. Initially, this conclusion focused on the national evaluation literature of standards-based education, as well as Common Core State Standards and other recent initiatives that have facilitated the increasing nationalization of not only standards, but teacher training, curriculum, and assessment as well. This is a major departure from 400 years of American traditions of local control over education.

Standards-based education has clearly become an integral and settled part of local, state, and federal education policy. Furthermore, recent momentum for national standards is pervasive, sustained, and growing. In spite of the active support of major components of the mainstream education establishment in the United States, other researchers have noted numerous criticisms, which I discussed in part two of my conclusion. Nevertheless, neither the supporters nor the detractors have, in my opinion, satisfactorily answered my third and final research question: “what has the lasting impact of standards-based education been, not only in education policy, but on society and the planet as a whole?”

The preponderance of business influence and global economic competitiveness ideology on standards-based education over the last several decades makes three major assumptions. These assumptions are that: 1) the globalized economy can and will continue indefinitely; 2) wage-based participation in the globalized economy is the main socially legitimated avenue to personal happiness, fulfillment, and development in most parts of the world; and 3) extrinsically motivated attainment of credentialing, provided by education, is the primary means for advancement within this globalized economy.

An extended discussion of these assumptions, hidden within the policy debate and rarely discussed, is vitally important because it can help explicate clear, distinct, and important characterizations of the 1) disparity between the neoliberal ideology of weakening nation-states so often professed by their ideologues and the practical reality of strong states their technocrats strive to create and utilize, 2) future, and 3) ends of education. This first point, in particular, carries within its train significant geopolitical, environmental, and economic implications, which I will discuss at greater length in subsequent pages.

Moving from the personal and microstructural to the public and macrostructural, Gabbard's conception of a market-driven conscience predicated on education successively conceived of as a requirement, an opportunity, and then a right also allows us to see the emerging contours of the strong state neoliberals crave, as opposed to the weak one they profess to predict.

The archetypical expression of the weakening of the nation-state under globalization can be found in Friedman's *The World is Flat* (2005). In that volume, Friedman opined that advances in computing and telecommunications, lower cost international travel, the proliferation of international brands, and other related trends have combined to create a global culture and global market where traditional historical, geographical, and cultural divisions have become increasingly irrelevant. While similar analyses could be provided, this example sums up the ideology adequately enough.

One of the most overt ways in which neoliberals utilize a strong state instead of a weak one is in the very imposition of neoliberal economic policies themselves. As Klein demonstrated in *The Shock Doctrine* (2007), Klein offers numerous case studies of how the mavens of international neoliberal economics and politics use their control over the levers of their nation-state to impose neoliberalism on their countries. Or, often, international multilateral

organizations (such as the International Monetary Fund) controlled by a select number of strong states dictate the terms of this imposition. In both cases, according to Klein's notion of "disaster capitalism," this consolidation of wealth and power often takes place during or shortly after man-made or natural disasters, with the power of nation-state often creating these disasters, or at least being used to act decisively enough to radically change a country's economic regime after (or during) one.

One important neoliberal use of the strong state was in the recent reconception of anti-trust law during the same period as the decades-long rise of standards-based education by American government officials and prominent jurists. These individuals, notably Robert Bork (1978), redefined the potential injury of monopoly as that of higher prices for consumers rather than concentrated ownership of the means of production. This not only led to significant outsourcing abroad but also inaugurated a startlingly powerful and largely unacknowledged re-monopolization of American business. This re-monopolization was of a peculiar sort, however, one with profound implications for the structure of the American economy and employment. American

monopolists increasingly don't run companies that make anything. Instead, they use banks to run trading companies, built to retail products that are manufactured abroad, built to arbitrage among suppliers, communities, and workers (Lynn, 2010, p. 15)

Obviously, this has had a tremendous impact on America's share of global manufacturing exports, which remained at approximately 13% from 1980 to 2001 (Joel Popkin and Company, 2003, p. 10), even though manufacturing jobs as a percentage of nonfarm payroll has been declining steadily since World War II – and even gross manufacturing employment figures have been declining since approximately 1979, as indicated by the figures in chapter three. According to the latest data from the U.S. Commerce Department, "U.S. multinational corporations, the big brand-name companies that employ a fifth of all American workers" may have added 4.4 million jobs in the United States during the 1990s, but they also increased overseas employment by 2.4 million as well. In the 2000s, this trend got significantly worse. While domestic employment was cut by 2.9 million jobs, employment abroad increased by 2.4 million (Wessel, 2011, ¶ 1-2). There are even some contemporary media reports that indicate China's share of global manufacturing may have just exceeded America's for first place.

Ironically, this outsourcing was used to lambaste the American educational system again and again for not producing workers competitive enough in the global economy, even though economic competitiveness is not caused primarily by schools, but by governmental policies and corporate decision-making, “at worst a crass effort to direct attention away from those truly responsible for doing something about competitiveness and to lay the burden instead on the schools” (Cremin, 1990, p. 103).

For example, when Toyota, BMW, and other high-quality automotive manufacturers choose to establish operations in the United States, they often locate in states with low-labor costs and low-educational achievement levels, and yet they still manufacture competitive, world-class products. Conversely, when American corporate executives relocate American manufacturing abroad, they do not typically send these operations to countries whose educational systems routinely rank near the top major international benchmarks, but rather to companies in China and other low-wage countries whose employees often do not even have a high school diploma.

At this point, it is difficult to argue that America has not become a corporatized plutocracy, arguably a kleptocracy, certainly a prime example of corporate socialism that uses a strong nation state to socialize the costs and privatize the benefits. Even elite insiders like Nobel prize-winning economist Joseph Stiglitz (2011), “democratic” national security maven Zbigniew Brzezinski (2007), Citigroup analysts (Kapur, Macleod and Singh, 2005), and National Academy member Niall Ferguson (2004) increasingly take this as a given. Among the most striking characteristics of this transition have been the rollback of the social contract and the concentration of wealth among the elite to levels not seen since before the Progressive Era in the United States in the early part of the 20th century.

The influence required to bring this state of affairs to fruition was not achieved by the powers of moral suasion alone. It required significant influence over the monetary, economic, foreign, and educational policy-making apparatus over time.

If the U.S. manufacturing base continues to shrink at its present rate and the critical mass is lost, the manufacturing innovation process will shift to other global centers. Once that happens, a decline in U.S. living standards in the future is virtually assured. (Joel Popkin and Company, 2003, p. 3).

So, ironically, the captains of industry engineer dramatic changes in the American economy to enhance their corporate profits (even when they are often not even taxed in America) and then blame these changes on an “uncompetitive” American education system. As Parenti (2001) has noted, when

U.S. governmental and corporate leaders talk about “our global leadership,” “national security,” “free markets,” and “globalization,” what they mean is “All Power to the Transnationals” (Parenti, 2001, para. 21).

Or, as Wallerstein puts it “the ideological celebration of so-called globalization is in reality the swan song of our historical system” (1998, pp. 32-33).

In considering what the lasting impact of standards-based education has been, we must concede that it has helped consolidate the corporation at the center of American life and culture, socialized job training costs, and helped big business’ mania for quantification colonize much of K-12 education. Its biggest impact, however, may have been in locking America into a role as “the model and gatekeeper” of neoliberal economics (Chomsky, 2001, track one, 1:00), guided by an extraordinary fealty to Dator’s “continuation” vision of the future, one that may be bringing us closer to his “collapse” scenario (2006).

Neoliberalism is usually characterized as the dismantling of the Keynesian accommodation between big business and big labor that was in effect in the core states of global capitalism since the Great Depression, typically associated with a strong governmental presence in the economy and extensive social welfare policies. When these are severely attenuated, and we add observations like those of Freidman above, that “advances” in telecommunications, computing, and travel have done much in recent decades to homogenize and “shrink” the world, it is not hard to hear the arguments that neoliberals have created weaker nation-states than existed before.

However, I would argue that, paradoxically, it is precisely these developments that strengthened the grip of the power elite on the levers of state power and dramatically enhanced their ability to socialize the costs and privatize the benefits, consolidating global wealth and power into their hands at levels unseen since the Robber Baron era of the late 19th century. In this sense, this makes a strong nation-state more important than ever - at least to the class to which the vast majority of benefits accrue.

Prominent futurist and University of Hawai‘i professor Jim Dator has developed a typology of four potential futures: 1) continuation, 2) collapse, 3) disciplined society, and 4) transformational society (Dator, 2006, para. 8-11). The first one, continuation, is essentially the official ideology espoused by much of the media, government, academia, and other key agenda setters. It posits that society (and the underlying economy) can, should, and will continue to operate indefinitely in the future as it has in the past. (Dator, 2006, para. 8). The collapse scenario says “that continued economic growth is inherently destructive - whether from a social, cultural, environmental, or economic standpoint” and that “collapse today, unlike in the past, may be global instead of simply local” (Dator, 2006, para. 9). The disciplined society sees a type of continuation, albeit one that focuses beyond “static and passive notion of sustainability” (Dator, 2006, para. 10). Transformational society anticipates technological and/or spiritual breakthroughs, from as yet largely unknown sources, which will significantly alter the present condition of society (Dator, 2006, para. 11).

In stressing the importance of the educational system in training people for the global economy, "global economic competitiveness" ideology takes Dator’s continuation typology as its bedrock assumption. The globalized economy can, should, and will continue. This powerful assumption is not empirically very well grounded. It assumes that an ever-increasing population using an ever-increasing amount of finite natural resources in the context of a rapidly degenerating planetary ecosystem can somehow continue indefinitely (Koetke, 2007, p. 94). Barring some nearly miraculous technological breakthrough, this is mathematically impossible - yet we continue to organize society, our economy, and personal lives as though it were true.

Scientists critical of the “continuation” concept often draw attention to what they see as the earth’s sustainable human carrying capacity. Some think we began “overshooting” when we left the Neolithic age and entered into urban sedentary civilization approximately 5,000-10,000 years ago (Catton, 1982). This long historical process was rapidly accelerated by the industrial revolution and its concomitant utilization of hydrocarbon fuels, a use of energy far in excess of that previously available to us by our finite annual solar energy budget.

Other analysts have put forward the concept of “Hubbert’s peak” or “peak oil,” building on the work of petroleum geologist M. King Hubbert (Deffeyes, 2008). Hubbert predicted that each major oil-production field in the world would eventually reach a point when half of the oil present will have been extracted. This is the “peak” in peak oil. After that, oil will become more

expensive to extract until a point is finally reached when it will require more energy to extract a barrel of oil from the ground than is present in it, making it unfeasible to continue. Others have extrapolated from this to consider the many other resources so vital to our “modern standard of living” (so often discussed in the rhetoric of global competitiveness ideology and standards-based education). This has led these skeptics to the similar but even more daunting concept of “peak everything” (Heinberg, 2010).

Peak everything is an important part of the collapse literature, a literature that is substantial, growing, and steadily gaining in mainstream intellectual credibility with each passing year. If the ideas it puts forward are even partially correct, then the continuation typology (the absolute, non-negotiable, bedrock assumption of the global economic competitiveness ideology underpinning standards-based reform) is likely to lead to an increasingly traumatic series of interrelated and convulsive environmental, economic, and geopolitical shocks that may gradually bring much of modern industrial civilization as we know it to a grinding halt.

The ends of education have been debated for millennia and it does not appear this question will be settled anytime in the near future. Most observers would probably say this is a good thing. A vibrant debate on this topic is an integral part of trying to imagine what constitutes a good society, a well-lived life, and proper stewardship of the earth. Answers to these types of questions must be reevaluated constantly to adapt to the ever-changing conditions of society.

Global competitiveness ideology assumes that participation in the globalized economy as a wage laborer is the major avenue to personal happiness, fulfillment, and development, certainly the most socially accredited one. In America, the ends of education are often considered in the continuum of ideas established by the *Committee of Ten* and *Cardinal Principles* reports (National Education Association, 1893; 1918).

The Committee of Ten was a group of university presidents and schoolmasters headed by Harvard president Charles Eliot and convened by the National Education Association to make recommendations regarding the nation’s primary and secondary school systems (Rothstein, Jacobsen and Wilder, 2008, p. 19). During this period, immigration, urbanization, and compulsory mass schooling brought many new people into the rapidly burgeoning American K-12 education system. Combined with the rise of the American research universities modeled after the German example, this also started making the articulation of subject matter preparedness between the nascent K-12 system and the colleges and universities more important. To address

these changes, the Committee of Ten recommended an academically rigorous college prep-type curriculum for all students. For many, this remains a valuable ideal to strive for. It can be an important means of achieving a holistic education that combines an integrated cultivation of intellect, affect, and moral sensibilities. This ideal also reiterates the vision of “a fully educated person” identified in the 1993-1994 collaboration between the University of Hawai‘i, Department of Education, and Kamehameha Schools which resulting in the *Hawai‘i State Framework for Student Assessment and Accountability* (Hawai‘i School University Partnership, 1994, p. 4).

Twenty-three years after the Committee of Ten report, the National Education Association released a report in 1918 that took a decidedly more utilitarian, instrumental approach to education. Instead of demanding high academic standards for all, the emphasis shifted to using the schools to teach job skills, “Americanize” new immigrants from southern and eastern Europe, and codify a two-tiered system of elite curriculum for the few and vocational training for the many. At its worst, this approach can solidify a system of tracking, sorting, and selecting that reproduces many of the essential aspects of the pre-existing class structure. Then again, many learners thrive in these more hands-on conditions. The current popularity of “project-based learning” is a testament to this, learning that teaches a variety of traditionally “academic” subjects in an interdisciplinary way (often through group work) on specific, concrete projects.

Beyond academic preparation and vocational training, there are many more ends of education that should be considered. Rothstein, Jacobsen, and Wilder have done an admirable job of capturing this diversity (2008, p. 43). Their content analysis of leading 20th century education policy documents and contemporary “survey findings and recommendations of policy makers,” led them to develop a typology of “eight broad goal areas for public education” in America that enjoy general consensus, as well as a quantitative determination of their relative importance (Rothstein, Jacobsen, and Wilder, 2008, p. 43).

Table 9.1

Eight Broad Goal Areas for Public Education in America during the 20th Century, according to Rothstein, Jacobsen, and Wilder (2008, p. 43).

Goal	Relative importance
Basic academic skills	21%
Critical thinking	16%
Socials skills and work ethic	13%
Citizenship	13%
The arts and literature	10%
Preparation for skilled work	10%
Physical health	9%
Emotional health	8%

Whatever pedagogy or goal for education one may prefer, it seems hard to deny that global competitiveness ideology presupposes personal happiness, fulfillment, and development is achieved primarily through wage labor in the globalized economy, as the three following quotes from different phases of globalization attest. The first is a quote from the seminal *A Nation at Risk* report at the beginning of modern globalization.

Knowledge, learning, information, and skilled intelligence are the new raw materials of international commerce and are today spreading throughout the world as vigorously as miracle drugs, synthetic fertilizers, and blue jeans did earlier. If only to keep and improve on the slim competitive edge we still retain in world markets, we must dedicate ourselves to the reform of our educational system for the benefit of all - old and young alike, affluent and poor, majority and minority. Learning is the indispensable investment required for success in the "information age" we are entering (National Commission on Excellence in Education, 1983, para. 6-7).

The second is from *The Jeffersonian Compact*, a joint statement issued by President Bush and the National Governors Association after the Charlottesville Education Summit, with significant input from a sitting president (Bush) and his immediate successor (Clinton), as well as the

governors. This was issued in 1989, just as modern globalization was getting underway in earnest.

The President and the nation's Governors agree that a better educated citizenry is the key to the continued growth and prosperity of the United States...As a nation we must have an educated work force, second to none, in order to succeed in an increasingly competitive world economy. Education has always been important, but never this important because the stakes have changed: Our competitors for opportunity are also working to educate their people. As they continue to improve, they make the future a moving target. We believe that the time has come, for the first time in U.S. history, to establish clear, national performance goals, goals that will make us internationally competitive (Bush and the National Governors Association, 1989, para. 2)

The third is from the education section of the present-day website of the Obama administration.

Our nation's economic competitiveness and the path to the American Dream depend on providing every child with an education that will enable them to succeed in a global economy that is predicated on knowledge and innovation (Obama, 2010, para. 3).

While these quotes come from governmental or quasi-governmental sources, their sentiments can easily be replicated from other interest groups as well. Detractors, however, have different ideas.

As Gabbard says, "across its history, compulsory schooling has provided the state with an increasingly vital ritual for enforcing the market as the only permissible pattern of social organization" (2003, p. 61). Lynn's (2010) recent work on the evolution of American monopoly law under neoliberalism characterizes this valorization of the "free market" even further.

A generation ago a highly sophisticated political movement appeared in the United States. This movement was dedicated to taking apart the entire institutional structure that we had put into place, beginning in the mid-1930s, to govern our political economy by distributing power and responsibility among all the people. The goal of this movement was to enable the few, once again, to consolidate power entirely in their own hands (Lynn, 2010, p. xvi)

How did the "rich and powerful" accomplish this? By combining the two words, "free market," in a way that

finally enabled themselves to transform the most brutal acts of men using corporations and massed capital, into the whims of a distant, blind, even vaguely just divinity.

America's lords, in perhaps the single most brilliant bit of linguistic legerdemain ever perpetuated in our nation, figured out how to transmute the scrim behind which they disguise their predations into the religion of the American people (Lynn, 2010, p. 141). This "linguistic legerdemain" also reifies compulsory mass schooling as "a ritual" that incorporates

individuals into a market society, providing them with the means for cultivating their use-value in order that they might be able to find their own individual salvation in the market while contributing to the broader salvation that the market bestows upon the society as a whole (Gabbard, 2003, p. 65).

This "ritual" is predicated around credentials and the supposed use-value they certify, a perquisite for salaried employment in a globalized economy (Gabbard, 2003, p. 65-66). As education gradually transmogrified from a "requirement," to an "opportunity," to a "right" (Gabbard, 2003, p. 66), this fostered the creation of a "market-driven conscience" that led people to judge their self-worth based on "the degree to which they meet [the] demands [of the market], abide by its laws, and conform to its norms by their patterns of consumption" (Gabbard, 2003, p. 67). This is a particularly arid conception of the ends of education, one that teaches that "the most essential lessons for learning to 'thrive' within a market society is to eschew the search for meaning" (Gabbard, 2003, p. 73).

Education (as distinct from schooling) might have created curious, powerful thinkers in self-possession of their own minds. As Nietzsche has written:

In addition, if the future gave us no hope for anything - our own existence now must encourage us most strongly to live according to our own laws and standards: it is an inexplicable fact that we live precisely today, and had an infinite time to develop - nevertheless, we possess only a short-lived today to show why and to what end we evolved. We have only ourselves to answer for our existence; consequently we want to be the real helmsman of this existence and not permit our existence to be a thoughtless accident (Nietzsche, 1876, para. 3).

Traditional progressive images of the educated person that gives a wide latitude for self-creation and self-possession according to Nietzsche's conception of "laws and standards." These have gone largely A.W.O.L. in government educational policy. For example,

the case for what's called "authentic assessment," open-ended essay tests and portfolios as measures of achievement, hands-on curriculums and experiential learning, the de-emphasis of test-based achievement in favor of "the love of learning," all of which many educators still embrace - is largely missing from the political arena (Schrag, 2000b, para. 5).

This image of the educated person in the western world implies an ideal that goes back to Plato and the philosophers walking together in the groves of ancient Athens. While this is often still held up to us as a vision to aspire to, it can be difficult to achieve under regimes of standards-based education. This is because most state standards documents are so imbued with narrow, utilitarian, and instrumental notions of the knowledge, skills, and dispositions needed in each subject in each grade that a Nietzschean, anarchist, or libertarian self-possessed, self-actualized person has little room to develop.

If it could be allowed to develop, then perhaps the educational system might create people ready, willing and able to use autonomous critical rationality, creativity, and empathetic spiritual intuition. This might have also helped enable us to see through the hypocrisies in modern society, create a just and sane social world, and take seriously our sacred roles as custodians of our posterity and our only spaceship.

Instead, in the corporation, we have let an immortal psychopath structure almost every significant aspect of economic, political, and cultural life on the planet. This characterization is not meant as hyperbole but as an attempt at a clinical diagnosis right out of the DSM IV, via Bakan's outstanding book *The Corporation* (2004) and, especially, the documentary of the same name (Achbar and Abbott, 2003). The DSM IV lists these symptoms for a diagnosis of psychopathology.

1) Callous unconcern for the feelings of others. 2) Incapacity to maintain enduring relationships. 3) Reckless disregard for the safety of others. 4) Deceitfulness; repeated lying and conning others for profit. 5) Incapacity to experience guilt. 6) Failure to conform to social norms with respect to lawful behaviors (cited in Achbar and Abbott, 2003).

All of these fit the "immortal person" of the corporation to a "T." We are receptive to this assault because the profound emptiness of mainstream, secular, scientific, materialist conceptions of the universe have enabled the extraordinary psychological sophistication of

marketing and advertising of consumerist ontologies to define us and our desires, infantilizing us in the process.

The “enduring contradiction” of liberal democracy is its “theoretical universalism” and historical viciousness (Singh, 2006, p. 81), a viciousness predicated on the ongoing use of the state’s alleged “monopoly on legitimate violence” (Weber, 1958, p. 77-128) against the working and middle classes at home and broad swathes of humanity abroad.

Technology, according to Max Frisch in his 1957 novel *Homo Faber*, “is the knack of so arranging the world so that we need not experience it” (p. 178). What we have never experienced, we are unlikely to love. What we do not love, we are unlikely to defend. Amplified of late by the extraordinary sophistication of modern advertisements’ appeal to the subconscious, this trend has been a long time coming. As many commentators have noted, the word “civilization” comes from the root Latin word “civitas,” city or town. As participants in civilization, inhabiting socio-economic roles that rely on incredibly minute subdivisions of labor, few of us comprehend what we are doing to the planet in the normal course of our everyday lives. Unable to see beyond the social system to the natural system that makes the social system possible, we have brought our species and the planet to a moment of grave crisis.

Ironically, the most vaunted ideals of western civilization may in fact be the very lies that keep us in chains. As the aphorism commonly attributed to Goethe goes: “none are more hopelessly enslaved than those who falsely believe they are free.” Yet the dialectic of the enlightenment contains the cure as well as the disease. We can only hope this former impulse will succeed. As Jefferson puts it

I know no safe depository of the ultimate powers of the society but the people themselves; and if we think them not enlightened enough to exercise their control with a wholesome discretion, the remedy is not to take it from them, but to inform their discretion by education (1820, para. 1).

This was the goal set for us by the Enlightenment (Kant, 1784). Even some interpretations of globalization today seem to promise us hope of moving beyond the realm of necessity into the realm of freedom, with the ability to choose meaningful goals based on autonomous rationality, informed leisure, and notions of the perfectibility of “man” and “society.” Yet what goals do we typically pursue in practice when provided with a modicum of affluence? All too often, we pursue those goals that satisfy our most primordial urges, carefully

triggered by an omnipresent, finely-tuned, and scientifically-honed marketing establishment developed over the last century, now available to the highest bidders in business, the government, and military.

Instead of using “man's emergence from his self-imposed immaturity,” we wallow in our “inability to use understanding without guidance from another” (Kant, 1784, para. 1-2). This immaturity is self-imposed when it lies not in a lack of understanding, but in a lack of resolve to use it. “*Sapere Aude!* [dare to know] "Have the courage to use your own understanding!" - that is the motto of enlightenment (Kant, 1784, para. 1-2).

The notion of enlightened self-interest (let alone any sense of thinking seven generations forward as good stewards of the earth, as some native American traditions would have it) has been under assault for a century by highly sophisticated appeals to our emotions by the marketing establishment. Yet there are those who tirelessly carry the banner for reason and education: “indeed, if there is an anarchist vanguard, it is a vanguard of teachers - and not the cadre of a secret army” (Ehrlich, 1996b, p. 333).

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