# Takeovers of School Districts

*AEFP Live Handbook*
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## Introduction

A "takeover" of a K–12 public school district in the U.S. is a shift in governance authority, typically away from a locally elected school board. More specifically, "state takeovers" shift decision-making authority to the state and can result in a variety of governance arrangements, including state appointment of board members, superintendents, or both. "Mayoral control," sometimes called a "mayoral takeover," also shifts power away from an elected school board, typically by giving the mayor the authority to appoint the majority of (or all) school board members. A mayoral takeover could be the result of a state takeover or could happen in the absence of one. State takeovers and mayoral control are distinct from school-level takeovers in that they impact the governance of an entire school district.

State takeovers have increased over time but are still relatively rare events, typically reserved as a measure of last resort. Between the late 1980s, when the first takeovers took place, and 2024, takeovers have occurred 143 times. However, takeovers have impacted millions of students, given that they have occurred in several large districts, including New York City, Chicago, Philadelphia, Detroit, Cleveland, Houston, and Newark. At least 28 states have laws explicitly authorizing state takeovers of districts. Some state laws allow more aggressive interventions than others; for example, state leaders are permitted to override collective bargaining agreements in some cases. The two most common reasons that states give for taking over districts are (1) fiscal challenges and (2) low academic performance. Takeovers that are undertaken to remedy low achievement are considered "turnaround" efforts, although district turnaround can also occur in the absence of takeover. States also vary in their requirements for a return to local control after a state takeover.

Proponents of state takeover argue that it is states that are constitutionally responsible for school systems—although they often delegate this responsibility to districts—and that they therefore have an obligation to intervene when performance suffers over a long period of time. Arguments for takeover largely stem from critiques of school board governance that suggest that states have greater resources and capacity for system improvement than local leaders elected in low-information, low-turnout elections. Takeovers may help district leaders bypass local political dynamics that create barriers to reform and shift decision-making to a forum where teachers' unions may have less influence. Critics of takeovers argue that they usurp transparent, local, democratic decision-making and self-determination. They point to the potential political or racialized motivations for takeover and argue that it is especially problematic when there are racial or partisan differences between state and local leaders. State leaders may be too removed from local contexts to effectively tailor reforms, or they may simply lack capacity. Finally, critics worry that takeovers cause harmful disruptions for both children and adults, particularly when they involve high levels of staff turnover.

Proponents of mayoral control argue that this arrangement can increase accountability given that voter turnout is higher in mayoral elections than in school board races. It can also raise the profile of education issues, increase opportunities for coordinating child and family services across city agencies, and provide

an opportunity for mayors to appoint school board members with relevant expertise. In contrast, opponents of mayoral control worry that it weakens accountability if education becomes overshadowed by other issues in mayoral races and that it limits community input, accountability, and transparency and empowers leaders lacking expertise in education. It is also possible that mayors are as much at risk of political capture by interest groups as school boards—or even more so.

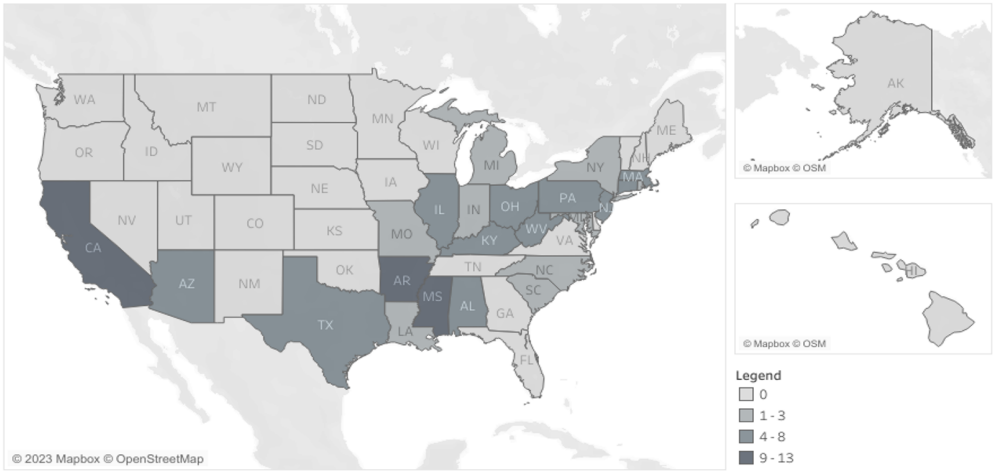



Figure 1. Number of districts taken over by states from 1988 to 2018

# Key findings

**Key finding #1:** *State takeovers have not benefited student standardized test scores, on average.*

Nationally, test scores in math and English language arts (ELA) have not improved for the average takeover district after the takeover relative to the change in test scores for school districts not taken over during the same period. There is some evidence that takeovers can disrupt student achievement in ELA in the early years of takeover implementation. The findings summarized here are based on the best available evidence on state takeovers. Although no randomized controlled trials of state takeovers are available, the research literature on takeovers uses up-to-date, high-quality, quasi-experimental research methods, providing confidence in the estimates of the causal effects of state takeover. In contrast, current research on the impact of mayoral control is less conclusive than the evidence on state takeovers.

**Key finding #2:** *The impact of state takeovers on academic outcomes has varied substantially across districts.*

Although there are no positive impacts of state takeovers on test scores, on average, there is considerable variation in the effects of takeovers from district to district. In some districts, takeover has led to substantial improvements in test scores; in other districts, it has substantially harmed test scores; and in still other districts, it has had no impact in either direction. This is the case even within states, suggesting that district-level rather than state-level factors explain a takeover's success. Districts that were higher performing prior to takeover, relative to the national performance distribution, experienced more negative takeover impacts. The impacts of takeover on test scores do not appear to vary based on the rationale for takeover (academic vs. nonacademic). There is limited evidence on the impact of takeovers on other nontest academic outcomes beyond a small number of case studies of takeovers

that show positive effects on high-school graduation and positive or neutral effects on postsecondary outcomes.

**Key finding #3:** *State takeovers are more likely to occur in districts with certain characteristics.*

Low-income students and students of color are overrepresented in takeover contexts. Takeover districts are also more likely to have below-average test scores than nontakeover districts. However, even after their academic achievement levels are accounted for, districts that serve a greater concentration of Black students are more likely to be taken over than those that serve majority-White populations. Compared to districts that have not been taken over, takeover districts are also likelier to have a higher share of their funding come from state sources, to be in urban contexts, and to be in states where Republicans have unified control of state government.

**Key finding #4:** *State takeovers increase spending and improve some measures of fiscal health, on average.*

Nationally, per-pupil spending increases for the average student in a takeover district after the district is taken over relative to the change in spending in districts not taken over during the same period. The new funds come primarily from state revenues and are mostly used to cover districts' legacy costs, such as debt and employee benefit commitments. Takeover also improves some measures of fiscal health for takeover districts, on average. The increases in spending are larger when the takeovers are undertaken for nonfiscal reasons (e.g., academic or other nonfiscal reasons only).

**Key finding #5:** *State takeovers have political implications.*

Takeovers often generate substantial public resistance from within the targeted communities. Public opinion research suggests that opposition to a takeover is highest among those most likely to lose political or economic power as a result of the takeover. Takeovers can impact local descriptive representation, i.e., the extent to which elected officials demographically reflect the communities they serve. Case study evidence suggests that takeovers can lead to significant teacher replacements and turnover among school staff members, which may at least partly explain why takeovers can face significant opposition.

**Key finding #6:** *State takeover effects vary depending on the racial and ethnic composition of the targeted community.*

The impact of takeover on test score outcomes has historically been more neutral or even negative in districts serving larger concentrations of Black students but has been more positive in districts serving larger concentrations of Hispanic students. The impacts on descriptive representation similarly vary by the racial/ethnic composition of the district. When takeovers have occurred in majority-Black districts, they have tended to be followed by decreases in descriptive representation. However, the opposite has been the case in majority-Hispanic communities, where takeovers have tended to pave the way for greater Hispanic representation among local elected officials.

# Evidence

*Background*

Importantly, when interpreting the research on takeovers, one must bear in mind that both state takeover and mayoral control can result in a wide range of different types of leadership changes and policy reforms.[1] No two takeovers look exactly alike. For example, in New Orleans, Louisiana, takeover resulted in mass teacher replacements and the nation's first all-charter school district.[2] In contrast, in Lawrence, Massachusetts, leaders actively replaced a smaller share of teachers, and none of the schools were converted to charter status.[3] Some takeovers last only a single year, while others have persisted for over a decade.[4] Additionally, takeovers are often followed by the adoption of a bundle of districtwide reforms. Such adoption can make it difficult for researchers to study the mechanisms that might explain why takeovers do or do not benefit students or to isolate which aspects of the leadership shifts or the bundle of policy changes drive the results. This handbook entry focuses on the research that attempts to capture the impacts of the governance shift itself while accounting for the fact that such a shift can lead to a considerable range of education policy changes. The implications of this variation in takeover implementation are further discussed in the "Understudied issues" section below.

*Takeover impacts on test scores*

The primary evidence on the impacts of takeover on test scores on a national basis comes from a quasi-experimental study examining the impact of 35 first-time takeovers undertaken between 2011 and 2016 on standardized math and ELA exam performance.[5] The study compares changes in test score outcomes for takeover districts before versus after the takeover to changes in test scores for districts not taken over during the same period. The authors control for test scores in the year prior to the 2009–2010 academic year (i.e., prior to any of the takeovers under study) to compare similarly achieving districts that were and were not taken over. The results of this comparison are the closest to causal evidence that researchers have been able to produce, given that takeovers are not randomly assigned to districts and that data allowing for test score comparisons across states (through the Stanford Education Data Archive) are available only starting in 2009. The researchers find that takeovers have had no impact on math or ELA test scores. There is no evidence of benefit, given that the estimates are negative in direction and small in magnitude (-0.04 to -0.05 standard deviations (s.d.)) but not always statistically significant. The study documents some evidence of moderate disruptions to ELA achievement in years two and three of takeover (between -0.07 and -0.08 s.d.).

An earlier study examines the impact of six state takeovers undertaken in the 1992–2000 period, prior to the federal No Child Left Behind policy and universal accountability.[6] The results provide somewhat inconclusive evidence on the impact of takeover on student achievement outcomes. The researchers find some post-takeover improvements, but there are three reasons why the evidence from this study makes it difficult to isolate the impact of takeover. First, in some cases, these findings are not based on comparisons between post-takeover and pre-takeover performance. Second, the authors examine change over time in takeover districts only. They do not rely on a comparison group, which, once again, makes it difficult to isolate the impact of takeover from other factors that change over time for all districts and that affect student achievement. Third, given the data limitations of the time, the authors rely on test score proficiency rates (rather than standardized test scores) as the outcome, which can distort the results since this outcome is dependent on the underlying performance distributions.[7]

This same study also provides the main existing evidence on the impact of mayoral control on student outcomes. Again, the authors focus on the 1992–2000 period and examine the outcomes for eight mayoral takeover districts. Compared to the impacts of state takeover, the authors are more optimistic

about the impacts of mayoral control on student performance, particularly for elementary-school students and students in the lowest-performing schools. However, once again, this study is not set up to conclusively support causal conclusions about the impact of mayoral control, given that the analysis is not always based on pre- versus post-takeover comparisons, the study does not rely on a comparison group, and the outcomes are proficiency rates. Notably, two quasi-experimental case studies of mayoral control in Washington, DC, after 2007 suggest that these reforms contributed to substantial improvements in academic achievement.[8] There are additional case studies of districts under mayoral control, such as research on academic improvements made in the Chicago Public Schools system, but these studies do not typically isolate the effect of the governance shift.[9] In summary, the strongest available evidence on state takeovers suggests that, on average, these reforms do not benefit student outcomes, while the literature on the average effects of mayoral takeover is currently less conclusive.

*Variation in takeover impacts across districts*

Although takeovers do not benefit student outcomes, on average, the impacts are far from uniform across districts. The national study on takeovers from 2011 to 2016 mentioned above illustrates that while some takeovers led to test score declines, others improved test scores substantially, and still others had no impact.[10] Researchers document variation in the direction of the effects even within states, suggesting that a takeover's success is not simply determined by a state's capacity or other state-level factors. One district characteristic that helps explain the effectiveness of some takeovers over others is the level of student performance prior to takeover. Researchers find larger negative effects of takeover on student achievement in districts that were relatively high performing prior to takeover. This finding may seem confusing since most takeover districts perform lower than average. However, within this low-performing group, some districts are among the very lowest performing in the country, while others are only moderately low performing. The evidence suggests that takeover can be particularly harmful when undertaken in districts that are not among the very lowest performing in the country.

The literature also includes several compelling case studies in which researchers credibly estimate the causal impact of individual takeovers on student outcomes. These studies use quasi-experimental methods to determine whether changes in student performance before versus after takeover are larger in takeover districts than changes in performance among districts not taken over during the same period. Notable cases where takeover has generated substantial gains in academic achievement include Louisiana's takeover of the New Orleans school system in the aftermath of Hurricane Katrina[11] and Massachusetts' takeover of the Lawrence Public School system in 2012.[12] Although takeover research on longer-term outcomes is scarce, studies show that both the New Orleans[13] and Lawrence[14] takeovers led to gains in high-school graduation rates. The New Orleans reforms also benefited students' postsecondary success, but the impacts of the Lawrence reforms on postsecondary outcomes were more mixed. In New Orleans, disciplinary suspensions and expulsions temporarily increased at the start of the reforms but then returned to pre-takeover levels.[15] In Lawrence, the impacts of the takeover on nontest academic outcomes were all positive to neutral.[16]

In both New Orleans and Lawrence, the districts serve student populations that are majority low-income, and takeover leaders increased school-level autonomy and learning time. However, these two cases vary in important ways in terms of both the characteristics of the contexts and the policies that leaders pursued as a result of takeover. New Orleans serves a majority-Black student population and had a majority-Black teaching force at the start of the reforms. Lawrence serves a majority-Hispanic student population and has a majority-White teaching force; in other words, there is little overlap between the families in the community and the teachers. The New Orleans reforms involved mass teacher lay-offs and turnover[17] and eventually led to an all-charter school district. In Lawrence, all schools retained neighborhood-based assignment and a unionized teaching force, and the district did

not actively replace a large share of teachers.[18] These differences in contexts and policies across takeover cases make it difficult to draw strong conclusions about what types of reforms work best for takeover districts in general.

In addition to the cases that provide positive proof points for state takeover, scholars have used rigorous quasi-experimental methods to document several other cases where takeover has led to negative impacts on student outcomes. These cases include Massachusetts' 2015 takeover of the Holyoke Public School system and the 2017 takeover of the Southbridge Public School system.[19] Researchers have documented more neutral or mixed impacts of Pennsylvania's 2002 takeover of Philadelphia's schools,[20] of New Jersey's 2013 takeover of the Camden City School District,[21] and of Tennessee's 2012 "Achievement School District" (an unusual case in that low-performing schools from across geographic districts were placed in a single statewide administrative district).[22] There are still other studies that examine districtwide initiatives undertaken in a takeover context but that do not isolate the impact of takeover itself, such as an evaluation of Chan and Zuckerberg's $100 million investment in the Newark Public School system and related reforms. These efforts led to initial declines in test score growth in the early years of reform, followed by a rebound to pre-reform levels in math and higher-than-pre-reform levels in ELA achievement growth after five years.[23]

*Characteristics of state takeover districts*

Among the 104 first-time state takeovers undertaken between 1990 and 2019, more were likely to occur in districts serving high concentrations of low-income students, students of color, and students achieving below grade level on standardized tests.[24] Hence, the impacts of takeover are likely to have important implications for equity. Although takeover districts are lower performing than districts in the rest of the country, researchers find that the racial composition of a district remains predictive of whether that district is taken over even after accounting for academic achievement levels, at least among the takeovers that occurred between 1988 and 2016.[25] In other words, between two districts with the same average test scores, the state is more likely to take over a district serving a higher share of Black students than to take over a district that is home to a lower share of Black students. Additionally, compared to districts that are not taken over, takeover districts are more likely to have fiscal challenges, to have a higher share of their funding come from state sources, to be in urban contexts, and to be in states where Republicans have unified control of state government.[26]

*Takeover impacts on fiscal outcomes*

Most state takeovers have been undertaken, at least in part, due to the fiscal challenges facing districts. Hence, scholars have examined the impact of takeovers on fiscal outcomes, finding that takeovers, on average, increase per-pupil spending in takeover districts by approximately $2,000 per-pupil after five years and improve some measures of fiscal health (budgetary and long-run solvency). These findings are based on a quasi-experimental study of 104 takeovers that occurred between 1990 and 2019.[27] The researchers compare changes in fiscal outcomes from before versus after takeover in treated districts to the changes in fiscal outcomes in districts that were not taken over during the same period. They also find that the new funds come primarily from state revenues and mostly cover districts' legacy costs (debt and employee benefits) rather than instructional expenditures. Interestingly, the impacts are larger when takeovers are purportedly undertaken for nonfiscal reasons (e.g., low academic achievement and/or other nonfiscal reasons only).

Previous studies focused on subsets of these 104 takeovers show no impact of the 35 takeovers that occurred from 2011 to 2016 on educational spending[28] and positive impacts of the 24 takeovers that occurred from 2013 to 2019 on educational spending.[29] The six takeovers undertaken between 1992

and 2000 were associated with lower per-pupil spending after takeover.[30] However, given that the quasi-experimental study covering the most comprehensive set of takeovers (104) finds positive effects, this result is the most credible estimate of the average impact of takeovers on fiscal outcomes. Additionally, the study of 24 takeovers undertaken between 2013 and 2019 finds that takeovers do not seem to dramatically reduce within-district fiscal equity between schools. However, this study uses propensity score matching techniques without another source of identifying variation, and hence, the results should be interpreted with caution, given the limits of these methods in regard to drawing causal conclusions.[31]

Some case studies examine the impact of individual takeovers on fiscal outcomes. For example, researchers find contradictory results for spending across three takeover districts in Massachusetts. Of the three, Lawrence is notable for having made significant gains in achievement without dramatically increasing educational spending relative to the state as a whole.[32] Finally, one study investigates the impact of mayoral control on fiscal outcomes. Examining eight mayoral takeover districts, the study finds declines in per-pupil spending after this governance shift, although it is unclear whether declines also occurred in other traditionally governed districts.[33]

*Political implications of takeovers*

Given that takeovers represent a shift in governance, i.e., decision-making power, it is likely unsurprising that they typically come with significant political implications. State takeovers can generate substantial public resistance, typically from within the communities that are targeted for state-led intervention. The research on this topic is based on several in-depth qualitative case studies of takeovers in contexts including New Orleans,[34] Detroit,[35] Memphis,[36] Newark,[37] and Holyoke (Massachusetts),[38] as well as a study of a proposed takeover in Georgia[39] and a cross-case comparative study of state-run turnaround districts in Louisiana, Tennessee, and Georgia.[40]

Research on public opinion, both nationally[41] and in post-takeover New Orleans,[42] demonstrates that the opposition to takeover is highest among the subgroups of respondents most likely to lose political or economic power as a result of the governance shift, such as middle-income Black residents of New Orleans or, nationally, teachers and residents of low-performing districts. Teachers, their unions, and (in some cases) central office employees have reason to fear for their job security in the takeover context, given that a takeover can be accompanied by lay-offs or other changes to the conditions of their employment or their work environments.[43] However, there have been rarer cases where takeover reforms have been less contentious, such as the Lawrence takeover in Massachusetts. Qualitative interviews and an analysis of press coverage suggest that the Lawrence takeover was politically smoother because of both the features of the context (e.g., increasing enrollments, the medium size of the district, the openness of the union to collaboration) and steps that the turnaround leaders took to minimize opposition to the reforms through both their framing and policy choices (e.g., limiting teacher replacements, partnering with both charter managers and the local teachers' union, prioritizing academics and extracurriculars).[44]

One notable study using descriptive and quasi-experimental methods examines the impact of state takeovers nationally on descriptive representation among local leaders, i.e., the extent to which elected officials demographically reflect the communities they serve. This research illustrates that takeover does indeed have an impact on descriptive representation; however, the direction of that impact varies depending on the racial and ethnic composition of the community. More specifically, when takeovers have occurred in majority-Black districts, they have tended to decrease descriptive representation, leading to smaller numbers of Black elected officials. In contrast, when takeovers have occurred in

majority-Hispanic districts, they have tended to pave the way for greater descriptive representation, increasing the number of Hispanic elected officials.[45]

*Race-based inequity in takeover impacts*

Scholars across multiple studies have found that the impacts of takeover vary depending on the racial and ethnic composition of the targeted community. More specifically, takeovers appear to have more negatively impacted outcomes in majority-Black communities and more positively impacted outcomes in majority-Hispanic contexts. This is the case for student academic achievement outcomes,[46] although for fiscal outcomes, the reality is slightly more complicated.[47] A similar pattern emerges for the impacts of takeover on adults in takeover systems in that, as described above, takeovers have historically decreased Black local political descriptive representation when undertaken in majority-Black communities and have increased Hispanic descriptive representation when undertaken in majority-Hispanic contexts. The mechanisms underlying these political changes are not well understood, but we know that, historically, when takeovers have been undertaken in majority-Black districts, they have been in places where Black citizens have already gained access to local public office. When they have occurred in majority-Hispanic communities, they tend to have occurred in places where Hispanic citizens have not yet gained this type of political power.[48]

The consistency of these patterns across student academic outcomes and political outcomes suggests one potential pathway through which takeover impacts student achievement that is consistent with the results. Other nontakeover research has documented that non-White local political representation improves spending on[49] and academic achievement outcomes for students of color.[50] Hence, takeover may impact student outcomes by shifting which groups have greater decision-making power.

## Understudied issues

The literature on takeovers has grown in recent years, but it is still not large and mostly consists of a smattering of case studies. The field would benefit from additional research to help unpack why some takeovers have been more successful than others, even within states. It has been challenging to draw strong conclusions from the case study literature about what makes takeovers more or less effective, in part because both the characteristics of the contexts and the policies that leaders have pursued vary across cases. The case study literature suggests that some policies might work better in certain contexts than in others. For example, post-takeover leaders in both New Orleans and Lawrence were able to generate positive gains in student outcomes but took very different policy paths to achieve those gains.[51] For example, New Orleans became an all-charter school district, while Lawrence converted no schools to charter status. Furthermore, New Orleans experienced mass teacher lay-offs, while Lawrence leaders replaced a much more modest number of teachers. Hence, we need to know more about how to effectively match reforms to contexts.

As another challenge, it can be difficult for researchers to isolate the mechanisms underlying takeover impacts because, typically, leaders adopt a bundle of districtwide reforms and because it is not obvious which pieces of the bundle drive any of the results. Nonetheless, there is other work on the features of school and district improvement initiatives that have generated the largest gains overall, regardless of whether they were undertaken in a takeover context. Meta-analytic research suggests that efforts to extend learning time and improve human capital are highly promising interventions for improving low-performing schools and districts.[52] Additional work examining the impact of takeovers on outcomes other than test scores (e.g., attendance, postsecondary achievement, employment, political participation) would also be welcome. Importantly, there is even less systematic research on mayoral control than on state takeover because there have been fewer cases of mayoral control and because

many of these cases occurred in a period prior to the existence of data that allow researchers to easily compare standardized achievement outcomes across states. Another understudied area is the long-term impacts of takeover, which take time to manifest, and the best practices for transitioning back to local control.[53]

Finally, the existing evidence on the impacts of takeover is from studies examining the effects of a state actually undertaking a district takeover. Such evidence is helpful for states considering whether or not to take over a district. However, it is less helpful for informing state decisions on whether or not to have a law authorizing takeover on the books. For example, it is possible that the threat of takeover has a positive effect on student achievement in low-performing districts in which takeover seems possible, even if takeover never occurs. One relevant case here is Springfield, Massachusetts, a historically low-performing district that, under the threat of state takeover, avoided receivership by agreeing to a partnership between the state, the district, and the teachers' union (called the "Springfield Empowerment Zone Partnership") to improve a zone of low-performing schools within the district. This partnership has been governed by an appointed board with some local representation. The Springfield reforms have generated meaningful improvements in student achievement, and the partnership zone model has now been attempted in at least ten states.[54] This model warrants further study, as does the impact of the presence of state-level takeover policies (regardless of whether they are actually applied to a district) on school system performance.

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