



# REACH

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## System Responses to Crisis: Organizational Perspectives

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# **System Responses to Crisis: Organizational Perspectives**

## **REACH Report Year 3**

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## **Introduction**

The present moment is rife with crisis, including national reckoning with racial injustice,<sup>1</sup> climate change, war, political turmoil, and more. These crises, in turn, have profound effects on schools and school systems.

The COVID-19 crisis is a case in point. In March 2020, the coronavirus shuttered schools across the United States and the world. In the first year of the pandemic, school systems faced difficult decisions about how to deliver instruction while maintaining the safety and wellbeing of students, families, faculty, and staff. As the months passed, the consequences from this public health crisis became even more apparent, as it disproportionately affected historically marginalized communities and further exacerbated existing educational inequities. Indeed, recent reports show that losses in math and reading were larger in high-poverty districts ([Education Recovery Scorecard](#), 2022).

Therefore, it is essential to understand how schools and systems respond to crises so we can design and implement changes in policy and practice that will better prepare us for the future. In our research, we sought to accomplish this goal by asking the following questions: How did school systems respond to challenges in this early phase of the pandemic? And did these responses differ by school sector (charter, private, or traditional public school) and by context?

As members of REACH, the National Center for Research on Education Access and Choice, which is dedicated to studying and improving school choice and equity, we began asking these questions at the outset of the pandemic. There were many reasons to expect that different sectors might respond differently, with implications for equity and access to schools. From an organizational perspective, we recognized that the varied contexts and governance arrangements of traditional public-school districts, charter schools, and voucher-receiving

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<sup>1</sup> We have another report exploring school and district responses to racial injustice. See [insert citation].

private schools could lead to different practices and responses to the health crisis and to changing parent preferences. More specifically:

- **Charter schools.** On the one hand, theories about school choice (Chubb & Moe, 1990; Freidman, 1955) would predict potential crisis-response advantages for charter schools and systems. The pressure to attract and retain students coupled with greater levels of autonomy, for example, might lead to more innovation from charter schools. Less regulation and greater capabilities for adaptation might also position charter schools well to respond nimbly to crises. On the other hand, certain characteristics such as potentially having limited networks and resources (particularly for standalone charter schools) could inhibit charter schools' capacity to respond. Studies have also documented challenges of charters, even in the larger networks, in adapting to changing environments—such as the struggles of the charter management organization Achievement First in adapting to the Common Core State Standards ([Wexler, 2015](#)), and of several big charter networks in Tennessee's Achievement School District (Glazer et al., 2019). Regardless of the potential advantages or disadvantages of being a charter schools, the theory would likely predict that the autonomy and lack of bureaucratic constraints would yield greater variation among charter schools and systems in responding to the pandemic.
- **Traditional public schools and systems.** On the one hand, theory and research on traditional public schools would predict these organizations to be less nimble, stodgier, and more homogenous in their crisis responses because of their greater bureaucratic constraints (Chubb & Moe, 1990; Freidman, 1955; Wong & Sunderman, 2001). On the other hand, traditional public schools have faced market and accountability pressures for decades, developing capabilities for innovation, learning, and adaptation in complex environments. Many districts, for example, have developed their own within-district choice systems that foster competition (e.g., public school choice in cities such as San Francisco, or in-district charter schools in San Antonio). Studies have also documented minimal differences, in many cases, in the missions, underlying logics, and educational programs and practices of traditional public schools compared with charter schools (e.g., Lubienski & Lee, 2016; Marsh et al., 2020; Schaft & Biddle, 2013). Moreover, well-developed centralized systems and structures that characterize traditional public-school systems could prove beneficial in times of crisis, allowing for more immediate and coordinated responses.
- **Voucher-receiving private schools.** On the one hand, theory and research about school choice would predict nimbleness and heterogeneity in private-school responses to crises arising from even greater freedom from bureaucracy and regulation than in charter and traditional public schools. Yet, much like in the charter school sector, limited networks, limited resources, and the lack of economies of scale for some private schools (particularly the parochial and non-elite-independent schools, which are more likely to accept school vouchers) could pose challenges to those responding to crises.

Thus, looking across educational sectors, we found no definitive predictions regarding which sector would respond “better” or how the sectors would vary in their responses. We also recognized that one potential benefit of choice is that it creates heterogeneity in school systems wherein schools are organized and run differently, provide varied programs and foci, and attract different personnel and students. We believed it was important to understand whether that variation produced different, or more effective, responses to the pandemic. With this in mind, we designed a study to answer the following questions in a purposeful sample of seven districts and 18 schools from both urban and rural settings in four states (Colorado, Louisiana, Michigan, and Oregon) and in Washington, DC:

1. How did school responses to the first year of the COVID-19 pandemic vary by organizational contexts (traditional, standalone charter, charter management organizations [CMOs], voucher-receiving), particularly in supporting the learning and well-being of historically marginalized students/families?
2. What conditions help explain differences and similarities across organizational contexts (e.g., autonomy of charters/private, capacity/networks, size, urbanicity)?

The following report synthesizes our responses to these questions, drawing on 68 interviews with district, school, and community leaders and 46 interviews with parents, along with analysis of websites, social media, and documents. This work also built on prior years of research, pre-COVID, in these states and many of these districts, providing important historical perspectives and knowledge that contributed to our understanding of crisis response. (See our [report on school choice policy and equity in the five states pre-COVID](#); see also our [report on parent experiences during the pandemic from a survey of a statewide sample of parents in the five states](#).) We collected data in real time, during the first 16 months of the pandemic, which allowed us to capture school and district decisions and responses as they occurred, rather than rely solely on retrospective interviews.

As our findings demonstrate, districts in our study undertook a variety of strategies to navigate the COVID-19 pandemic, although their response patterns roughly followed a cycle of anticipating the crisis, coping, and adapting to it. We found some differences between rural and urban districts—namely, that centralized communications and in-person instruction throughout the pandemic were more common in rural communities. In contrast, school responses across sectors (charter, private, and traditional public schools) were largely similar in regard to serving basic needs (e.g., meals, technology), with some variation primarily in their approaches to communication, transportation, and instructional modality during reopening in Fall 2020. We suggest that many of those differences may be attributable to the local political context rather than to any organizational features across sectors.

In what follows, we first review prior literature and theory about organizational responses to crises. We then describe our methods and data sources before turning to our findings, organized around the following major themes: similarities and differences in school and district responses to COVID; the extent of within- and cross-sector collaboration and competition and how that drove responses; the role of new actors and shifts in political and power dynamics;

and how state policy and geographic context influenced responses. We conclude with a discussion about the key takeaways and implications of our work.

### Prior Literature

Early in the pandemic, many timely reports focused on providing information on best practices (Forno et al., 2021), such as focusing more on relationships and antiracist practices than on learning loss (Rigby et al., 2020); or they reported on the increased challenges faced by leaders at the start of the crisis (Hausemann et al., 2020). Other reports examined the actions taken by stakeholders at a particular time. For example, analyzing state agency policy guidance across 50 states, Reich et al. (2020) found several areas of consensus, such as the cancellation of testing, continuation of some form of remote learning, and concern for serving students with disabilities, with divergence in the purpose or goals of learning during a pandemic (e.g., progress in standards and new material vs. enrichment activities). As time went on, more studies undertook a retrospective examination of perceptions and actions, including reopening plans and how districts conveyed information about equity or special education services (Gross & Opalka, 2021; Woulfin & Jones, 2021).

Many of these early studies documented what schools did in response to the pandemic, such as what key decisions or actions were taken regarding technology and communication in Spring 2020 (e.g., Rogers & Ishimoto, 2020) or, later, regarding reopening or ongoing online instruction (e.g., CRPE, 2020).

Given that early researchers of the pandemic were responding to an unexpected event and doing their best to document the nature of COVID in schools and its impacts and to provide timely information to schools and districts to cope with the crisis, most studies examining schools' responses to COVID are, understandably, descriptive in nature, and they lack a specific theoretical frame. We thus lack a deep understanding of how organizational conditions and contexts shaped COVID response.

Prior literature does point to some of the organizational conditions that might drive response to the crisis. A handful of studies have explicitly considered the organizational dimensions of COVID response. This emerging research has established that *prior conditions* and *internal capacities* matter for the response of organizations to the pandemic (Kaul et al., 2022) and has examined *organizational adaptation* to crisis. A few studies (specifically Gerber, 2020a, 2020b; Malkus, 2020b, 2020c; Ondrasek et al., 2021) examined district actions, finding, for example, that most districts did not have policies in place regarding emergency school closures (Gerber, 2020a). Thus, prior infrastructure and policy to respond to crisis could shape responses.

Furthermore, some studies pointed to the role of different actors, including those external to schools, such as partnership between K–12 and higher education organizations and how they shaped COVID response (Biag et al., 2021). Authors of these studies have examined teachers' experimentation with instructional techniques (Khanal et al., 2021), how principals supported their students and communities and implemented changes to organizational routines during

crisis response (Grooms & Childs, 2021), and how educators and leaders fostered resilience in organizations by emphasizing values, communication, family engagement, equity, and staff care (McLeod & Dulskey, 2021). Schools are situated in a broader context, where internal actors, such as teachers (e.g., Brelsford et al., 2020) and district leaders, i.e., superintendents (Malkus, 2020a), in addition to parents and community members (e.g., EdChoice 2021), influence actions taken during the pandemic. Yet few researchers explored how multiple stakeholders and local political contexts influenced school organizational response.

One key feature of the organizational context driving COVID response is the school sector: that is, how responses differed between charter, traditional public, and private schools. Although several studies have documented how both traditional districts and charter networks have navigated the crisis (Marshall & Bradley-Dorsey, 2022), fewer studies have directly compared charter and traditional public-school response. Prior research has examined school actions at a single charter school (Childs et al., 2022), examining how the charter school leadership exhibited organizational commitment and addressed student attendance. Researchers have also described the actions taken in response to COVID across and within charter networks (CREDO, 2022). For example, Marshall and Neugebauer (2022) conducted a case study of charter principals, finding a uniform set of strategies among choice schools across CMO networks.

Yet, with few exceptions, little work has made comparisons between charter and traditional school choice models, even though the different conditions and autonomies in these contexts might predict quite different responses to crisis. One study focused on teachers' experiences in charter, private, and public schools (Esteves et al., 2021), revealing that teachers were largely excluded from decision-making processes yet nevertheless developed new and effective instructional strategies in response to the challenges brought about by the pandemic. One report compared traditional public and charter school responses, particularly in terms of online learning and related supports, and found that charter schools and traditional public schools were equally likely to require device distribution but that charter schools were less likely to ensure internet access for students (Clifford et al., 2020). And CRPE's (2021) systematic review of school districts' and charter management organizations' websites revealed key differences and similarities across geographies: Rural schools were more likely to offer in-person instruction than urban or suburban schools, but all schools moved toward more in-person learning by the middle of the 2020–2021 academic year. However, they, too, did not directly explore the differences between the charter and traditional public school sectors. These differences are important to explore more deeply, particularly in efforts to understand what conditions contribute to similarities or differences in response by sector.

Another contextual factor explored in prior research on pandemic response was the school or district context, particularly in terms of student demographics and geography. These studies explore some differences by school context (e.g., student poverty, geography), finding, for example, that schools serving low-income communities struggled with technology infrastructure to help their students transition to remote learning (Rogers & Ishimoto, 2020).

### Conceptual Framework: Organizational Perspectives on Crisis Response

To explore organizational responses to COVID across school sectors, we draw on concepts from organizational theory. Whereas some studies examining COVID-19 have used a crisis response framework (McLeod & Dulsky, 2021; Urick et al., 2021), we turned to organizational theory, which considers the complex ecosystem in which schools are embedded. Although crisis response frameworks capture flexibility, agility, robustness, and resourcefulness (Urick et al., 2021), the framework focuses primarily on leadership response *within* organizations, rather than on the external factors (state politics, local dynamics, and policies) that influence responses within organizations. Specifically, we look at how conditions internal and external to the school or system (organization) influenced decisions about how to respond to crisis (See Figure 1). In this framework, internal factors include organizational practices, mission, resources and hierarchies/power, and external factors include economic conditions, local politics, and civic capacity.

In terms of our study design, this arrangement led us to pay close attention to internal capabilities and resources of school systems/schools that could conceivably either enable or constrain their ability to anticipate, cope, and adapt to crises over time (Duchek, 2020). Specifically, we focused on how organizations predicted and observed the crisis, on how they developed immediate solutions, and, to the extent we could, on how they reflected or learned to make long-term adjustments in anticipation of future crises (Duchek, 2020).

Our interview protocols and analytic plan took into account both the *processes* of decision-making in educational systems and the *conditions* that facilitated that response. To further unpack how districts responded to the crisis, we broke down crisis-response decisions by key categories: learning and assessment (e.g., distance learning), student and family supports (including meals or other health supports), and school operations and human resources (e.g., health and safety, closing/reopening, and supports for teachers and staff).

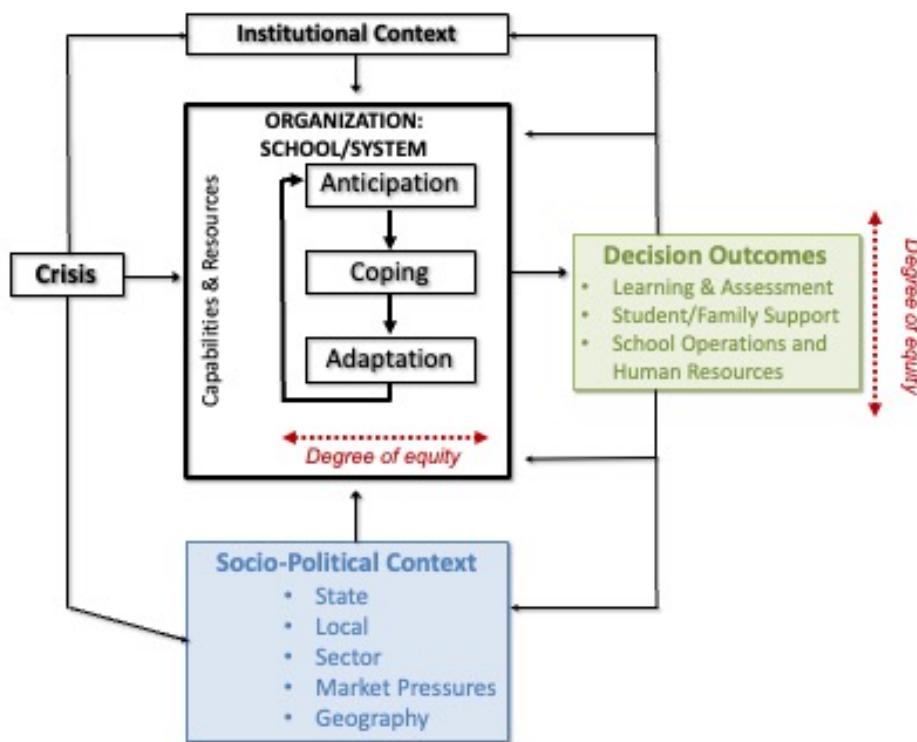


Figure 1. Conceptual Framework

School systems do not exist in a vacuum, which meant that we had to consider the external context of school and school system responses and their relationships with various stakeholders. We hypothesized that along with more proximate stakeholders like public health officials or nonprofit advocates, other levels of government—city, county, state, federal—could also shape district responses. When we considered the conditions that facilitated a response, we looked at sectoral differences between traditional and charter schools, ideas of civic capacity, or the extent to which various sectors of a community came together around an important matter (Stone, 2001), and at political context in terms of the limitations and constraints on organizational actions. This body of work pushed us to recognize that multiple stakeholders outside of school districts were involved in many important decisions during the pandemic. Accordingly, we interviewed leaders in community-based organizations, public health officials, policymakers, and advocates.

We believed that school system decision-making was further influenced by the sector in which it operated. For example, charter schools operate under different policy constraints and are often part of a network that may have different priorities, capacities, and resources than traditional public schools. This difference might lead charter schools to diverge from traditional public schools in their responses. At the same time, institutional theory (Scott, 2013) suggests that schools and districts may emulate actions taken by other organizations in their field to maintain their legitimacy. Researchers have documented this type of isomorphism in charter



schools, where charter schools replicate practices that exist in traditional public schools in attempts to be viewed as legitimate schooling organizations (Lubienski, 2003; Marsh et al., 2020; Preston et al., 2012). In general, organizations, including schools (Aurini, 2006), are pressured to adapt to societal myths about what organizations should look like and do (Meyer & Rowan, 1977).

Given the disproportionate impact of COVID-19 on low-income communities and communities of color, as the project progressed, we adopted a more explicit focus on equity. To this end, we paid particular attention to the decisions and actions taken to support students of color, low-income students, and students with special needs (based on language, disability, and housing instability) and to how districts responded to calls for racial justice following protests against incidents of racial violence. The definition of equity guiding our work included looking for a more traditional conception that students with greater needs require greater resources, along with a transformational definition (Allbright et al., 2019). The latter suggests that meaningful equity requires challenging forms of oppression. By adopting this lens, we more substantively investigated equity in both the decision-making processes for districts during the pandemic and in the nature of those decisions in terms of how deeper changes and innovations took place.

By conducting interviews and follow-up analysis throughout the course of the first 16 months of the pandemic, we were able to identify, in real time, ways that organizations initially coped and then adapted to the pandemic and the new modalities of learning that followed. We also asked explicitly about how leaders believed their organizations were learning to adapt to future crises.

## **Research Methods**

Our conceptualization of school systems and school sectors is key to our research design. We define school systems as networks of schools that are joined by a common governing authority. For instance, a traditional school district is considered a school system in that it unites several schools under the jurisdiction of the district organization and school board. Charter schools and charter school networks are also considered school systems when they are linked by a common organization such as a charter management organization, like the KIPP charter network, or when they serve as their own local education agencies (as in the case of some standalone charter schools).

These school systems can exist across similar and separate sectors. We define school sectors as categories of schools that are distinct from one another in some of their core operational procedures (e.g., funding, enrollment, governance). The most common sectors are traditional public, charter, and independent (private). A single city might have traditional public schools, charter schools, and private schools, which belong to these three unique sectors. A school system (e.g., Portland Public Schools) might have schools in multiple sectors, namely traditional and charter sectors. In this report, we focus on the traditional public school and the charter sector, but we draw on our small sample of private schools ( $n = 2$ ) where relevant to illuminate key themes.

Below we detail our sampling strategy, data collection, and data analysis.

## Sample

Our primary sample for this report includes states and districts that participated in research we were conducting as part of the REACH Center when the pandemic hit. This research focused on understanding efforts to improve access and equity in school choice policies. At the state level, for this analysis, we selected four localities (Colorado, Louisiana, Michigan, and Oregon) to represent variation in choice policies and settings, including the geography, population, and types of choice policies and the maturity of these policies. All of these states had charter school policies, and Louisiana and Florida operated voucher programs that funded students to attend private schools.

Within each state, we then selected a large urban district (Denver, Detroit, New Orleans, and Portland).<sup>2</sup> We also included the District of Columbia (DC), which operates as a hybrid state-district. In this report we treat DC as a district. All these districts provide important variation in governance structure and choice context. Whereas Portland and the three rural districts represent more typical districts with a small number of charter schools, Denver, Detroit and DC have sizable charter populations, and New Orleans includes only charter schools. We describe these characteristics below:

- Localities with **traditional district governance** (local school board authorizes a small number of charter schools, if any, that operate independently with limited support and communication from the central office)
  - Teal and Jade,<sup>3</sup> two adjacent districts in rural Michigan with a few charter schools in the area
  - Sage, a district in rural Oregon that authorizes a virtual charter academy
  - Portland, Oregon, which authorizes only a few charter schools
- **Portfolio management**
  - Denver, Colorado, with a sizable charter school population; characterized as a “centralized portfolio model” (Bulkley et al., 2020), in which charters have autonomy but are overseen by an involved public school district that provides some centralized supports, enrollment processes, and expectations
- **Managed market**
  - New Orleans, Louisiana, operates a “managed market” (Bulkley et al., 2020) in which all schools are autonomous charters authorized by the school board or state, with some common regulations and a centralized enrollment system

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<sup>2</sup> Florida was also part of our initial sample and participated in state-level interviews, but we were unable to recruit an urban district to participate in our data collection. Some of our other reports do include data from Florida, including a [2021 report](#) on state-level efforts to advance equity in choice policies and a [2021 brief](#) on parent views on the pandemic.

<sup>3</sup> We use pseudonyms (Teal, Jade, and Sage) for the rural districts in our study.

- **Parallel sector governance**
  - Washington, DC, which has a large charter sector authorized by a separate charter school board and a traditional school district, both under the oversight of the mayor, with little integration or interaction across the sectors
- **Fragmented governance**
  - Detroit, Michigan, with many different charter school authorizers, districts, and management companies and no unifying governance or enrollment systems

Drawing on these localities and data already collected allowed us to formulate a more comprehensive understanding of the context and history of these nested systems. These varied contexts provide an opportunity to explore the micropolitical interactions of actors, policies, and contexts shaping reopening decisions.

When the pandemic hit in March 2020 and we pivoted the focus of our research, we decided to add rural districts to our sample to better understand that important context and how COVID responses unfolded in the rural context. We tried to recruit one rural district in each state and ultimately succeeded in securing participation from two geographically adjacent rural districts in Michigan and from one in Oregon. The combined number of districts included in our research and this report totals eight. See Tables 1–3 for a description of these localities’ choice contexts and state and school district characteristics.

[Tables 1–2 about here.]

## **Data Collection and Analysis**

Prior to beginning interview recruitment, we created detailed summaries of school district responses to COVID, drawing on publicly available data from districts’ websites and social media accounts, along the dimensions of interest (e.g., academics, modality, social emotional learning, and personnel).

Interviews were conducted by members of the research team via Zoom with central office administrators, system leaders/superintendents, school leaders, teachers’ union leaders, and community/advocacy leaders between December 2020 and July 2021.<sup>4</sup> In each district we selected leaders involved in traditional public schools (TPSs) and in charter schools (in all districts) and private schools (in Louisiana). To assist with comparisons, we selected only principals from elementary and middle schools, prioritizing schools with high proportions of low-income and racially minoritized students and schools visited in prior years. Interviews averaged 1 hour each, and all interviews were audiotaped and transcribed. Researchers completed a total of 68 interviews ( $n = 6$  in DC,  $n = 17$  in Denver,  $n = 11$  in Detroit,  $n = 12$  in New

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<sup>4</sup> Given the challenges wrought by the pandemic particularly on teachers, we chose not to include teachers in our interviews to avoid placing additional burden on their already difficult situations. We selected school principals.

Orleans,  $n = 10$  in Portland,  $n = 9$  in the Michigan rural districts, and  $n = 3$  in the Oregon rural district). See Table 3.

[Table 3 about here.]

We also conducted parent interviews at some of our localities. We drew on a subsample of 46 parents who filled out a survey in our urban case study districts (but not in rural districts), prioritizing lower-income families and seeking variation in racial/ethnic background, school sector, and students' grade levels. Our findings from these interviews will be described in greater detail in a future report; here, we pull in key findings to highlight parents' perspectives on some of the themes that emerged from our interviews with school and district leaders.

To understand how districts and schools in different sectors responded to the COVID-19 pandemic, we asked participants about their relationships with governing and other organizations; the types of decisions they made during the pandemic (related to academics, personnel, assessment/accountability, technology, social-emotional learning, and transportation); how much autonomy they had in making those decisions; and what resources and policies influenced their actions and decisions.

We coded interview transcripts in Dedoose using an initial list of deductive codes, including choice sector (traditional public, charter, private); urbanicity (urban, rural); and student sub-groups (low-income, students of color, English learners, students with disabilities, other); and response categories (e.g., academic, transportation). We then conducted detailed cross-case analyses with these coded data, using memoranda and matrix analyses. We wrote detailed case memos for each state and district using coded transcripts, field notes, and information gathered from social media.

### **Key Contributions and Limitations**

By intentionally sampling for variation in key policies and demographics across localities and by collecting data in real time, our study builds on prior research on district responses that uses content analysis of websites and key policy documents for data (e.g., Iachini & Childs, 2021) while adding a more comprehensive set of interview data covering multiple diverse stakeholders. Our study also takes a comparative approach, expanding on prior qualitative studies on COVID and schools, which have often been limited to a single state (Ondrasek et al., 2021), a single school, or a subset of schools within a single district (e.g., Edgerton et al., 2021). Overall, we found very little qualitative comparative work, and what we did find was often focused on differences across countries (Hoffman et al., 2021; OECD, 2020) rather than in school, district, or state contexts. Some qualitative studies examined student and parent perspectives on COVID across contexts in the United States (Schaefer et al., 2020; Wang, 2020) but not the school or organizational perspectives or responses. This focus presents a limitation because both the policy environment of different states and districts and COVID rates could vary dramatically and shape school and district responses.

Our work contributes to the existing literature by taking an organizational and ecological perspective on crisis response and bringing together multiple data sources (interviews, documents) from multiple stakeholders across different state policy contexts. Our work builds on existing research by examining the other potential drivers of these responses to COVID-19, including the role of organizational conditions and the influence of various actors. Our work also contributes to the existing research by specifically examining COVID response in the context of school choice. In our study, we explored the variation in response by sector. In other words, our work directly compares the responses to the pandemic of charter, traditional public, and voucher-accepting private schools.

Our work also has limitations. Although we sought to capture perspectives from a range of school sectors to explore how and why they developed particular strategies in response to COVID, our results are not representative of entire sectors in each locality. Our results draw from limited data from a small number of schools, and our aim is to help contextualize and explain school responses during the pandemic by exploring the role of various conditions. Our interviews were conducted in the first 16 months of the pandemic, so our results speak mainly to the immediate response.

### **Findings Part 1 – How School Systems Responded to Crisis**

We organize our findings by our research questions, first describing the variation in how school systems responded early in the pandemic and then analyzing similarities and differences between sectors and explaining how organizational features shaped response.

***Research Question #1: How did school responses to the first year of the COVID-19 pandemic vary by organizational contexts (traditional, standalone charter, charter management organizations [CMOs], voucher-receiving), particularly in supporting the learning and well-being of historically marginalized students/families?***

In this section, we briefly describe how organizations coped with the COVID-19 crisis from its onset through the 2020–2021 school year. We sought to understand how districts and schools of different types and sectors responded to COVID-19, particularly regarding historically marginalized students and families.

Districts and schools needed to make decisions, often rapidly, in several (overlapping) areas: learning and assessment, student and family support, and school operations. Table 4 summarizes the key (and overlapping) decision-making areas we examined in our data collection process. School leaders made decisions about *learning and assessment*. These decisions included determining how to hold schools accountable; how to structure instructional content, curriculum, and pacing; and whether and how to offer different instructional modalities, such as in-person, hybrid, or remote. Leaders also made decisions about *student and family support*, such as whether and how to attend to students' nonacademic needs, including those regarding social-emotional learning, meals, and technology. Finally, leaders also

faced difficult choices about *school operations and human resources*. These decisions pertained to health and safety, such as how to equip students and staff members with protective equipment (e.g., masks) and how to manage in-person activities to minimize health risks (e.g., keeping schools closed, social distancing), along with allocating funds and resources to accommodate students and staff needs (e.g., hiring additional personnel). Below, we provide a brief overview of decision-making in each of these areas.

[Insert Table 4 about here]

## Learning and Assessment

### ***Modality In Flux: Universal Closure in Spring 2020, Slightly More Variation in Reopening by Sector and Locality in Fall 2020***

Across the cases and school types in our study, schools presented a united front on closures and messaging in the spring of 2020. In the majority of localities, orders to close schools for in-person instruction came from the governor's (or in the case of DC, the mayor's) office in early March. These closures often took the form of an early or extended spring break as health officials grappled with the extent and severity of the pandemic. However, by Fall 2020, there was somewhat more variation, including by sector, and this was one of the few areas of school operations where we saw major differences.

In Spring 2020, overall, the charter sector followed the lead of TPSs. For instance, one DC CMO leader explained that even though he did not believe the mayor had the right to close charters, it conveyed a powerful message for charters to follow the mayor's guidance in the spring of 2020. He said:

We walked the line from a policymaking perspective to encourage the mayor not to tell charter schools to close, because technically, we believe that she should not be able to do that. But schools were very much like "DCPS is closing and the deputy mayor at DC Public Charter School Board feels like it's the right thing to close. However you need to message it, we're going to close." And everyone really did stick to that in a way that was really, really powerful.

Similarly, a charter leader in Detroit said of the traditional public school district's closure: "When DPS shut down, that was our cue." As Table 5 indicates, there were key similarities in modality across cases in the spring of 2020: All schools closed, largely prompted by the governor's office (or mayor's office, in the case of DC). All districts received some kind of state guidance, although with some variation in the information the guidelines conveyed. For instance, there were clear health and safety guidelines in Colorado and Oregon, as opposed to general recommendations in Michigan and Louisiana. We provide an overview of reopening timelines for all five cities in Table 6 and show school reopening status over time in Figure 2.

[Insert Table 6 about here]

[Insert Figure 2 about here]

By the fall of 2020, however, we saw more variability in how and when schools reopened across localities, based on local health and safety, politics, and community demand (see Table 5). All districts developed a reopening plan, with contingencies to allow for changes in the progression of the pandemic. The 2020–2021 year began with mostly remote instruction across the board, although some charters in Portland were able to offer in-person instruction earlier than traditional public schools, and some Detroit charter schools remained open in the winter months, even when the traditional public schools closed because of high COVID rates.

Otherwise, family preferences across locations drove similar reopening decisions between sectors in the same region. For instance, in Denver, there was a strong public outcry for returning to in-person instruction across sectors, so both TPSs and charters opened up earlier than schools in cities with more public apprehension around re-opening (e.g., Detroit). Likewise, in the rural districts, schools largely remained open for in-person instruction all year (with virtual options available). In Oregon, the rural district collaborated with a virtual charter academy, River Web Academy, to help establish the district’s own virtual school, River Virtual Academy. The teachers at the charter academy did the grading for the district’s virtual school, and the charter school received additional funding for providing the platform and this support. By the spring of 2021, our case districts all provided for some degree of parent choice in modality, with some localities (like Detroit) still operating mostly online and others (Denver) mostly in-person (Denver).

**PARENT PERSPECTIVES:** Parents acknowledged the challenges of remote learning and felt that teachers did their best in adapting to new modalities of learning. As one Denver TPS parent noted, “Overall, I thought they did a decent job considering that our teachers are in-person teachers,” concluding, “They were flexible. They changed the material. They tried to keep all the kids involved.” A charter parent in Portland noted that the online component was helpful because they were able “to go onto the platform and see all assignments and everything . . . so that was really how that exceeded my expectations.” A Detroit charter parent said that teachers were available through email or Zoom, so her daughter “had contact with the instructors daily,” which helped if she got “stuck.”

Most parents surveyed for our study were not completely satisfied with the quality of remote instruction but were mostly satisfied with school safety measures. As a New Orleans charter parent put it: “I understand all of the limitations of COVID and I’m extremely grateful that they took as many precautions as they did, but I felt like they could’ve done a lot more to find creative ways to make the learning more developmentally appropriate for the age.” A Detroit TPS parent similarly noted: “They did as best as they could because . . . I would’ve been going frustrated and crazy. I’d say, they did to the best of their abilities.” Still, parents were acutely aware that there were gaps in learning and that the ability of teachers to provide quality instruction was hampered by the online modality. A DC TPS parent felt that virtual school was “a constant struggle” and that “some of the teachers were relying on the different Zoom or different online education tools to do most of the teaching and so that was a little frustrating.”

Overall, despite parents' frustrations with virtual learning, they typically reported that schools were doing the best they could under the circumstances.

#### **DISTRICT ADAPTATION AND INNOVATION: THE CASE OF PORTLAND**

In Portland, leaders talked about the district making flexible choices and rapid innovations to cope with the pandemic. As staff quickly pivoted to the reality of teaching during the pandemic, leaders attempted to facilitate collaboration with families; community partnerships; and the distribution of new, innovative teaching methods and materials for virtual instruction. As one administrator concluded, "The level of innovation was far beyond what I think anybody would think could have been done in such a short period of time." For example, for the last quarter of the 2020–2021 school year, district leaders looked to districts across the country for ideas to adapt to their local needs. Noting that parents wanted options, the district developed a hybrid program with limited classroom time and a unique schedule while keeping students with the same teachers. At that point, there was simply not enough public health guidance on how to bring students back in person at scale, so leaders elected to start with schools with the greatest academic challenges to begin offering intensive educational services, with ongoing social and mental health supports. Adaptations in this area were critical in terms of shifting district priorities in the longer term. As one administrator concluded, "It couldn't have landed at a better time to be able to be doing one FTE [full-time employee] per high school for a social worker."

The case of technology distribution also shows insights into the processes of adaptation in Portland. District leaders in Portland initially focused on devices, but they soon became aware that connectivity was a greater challenge and turned to hotspot distribution. After recognizing the problem, one leader reported, "We immediately pulled up maps and looked at where are the schools that are in the places where there are these lack of access." Combined with surveys of family needs, district leaders used these data to adapt their plans for technology distribution and support.

#### ***Accountability: Similar Responses, Different Interpretations***

Across localities, state and district accountability and assessment pressures eased for all school types. Yet we found a divide in how this was experienced and perceived based on role (district- or campus-level leadership). District leaders, in particular, saw the pandemic as an opportunity to reimagine assessment and take a more holistic approach to measuring student success, de-emphasizing narrow standardized tests. In DC traditional public schools, a district leader noted that they were backing off from their typical "accountability hawk" mentality during the pandemic and were not rating schools. In Detroit, a district leader noted that they had to ease their internal accountability pressures on schools while still reviewing the data:

So it's really hard to tell a teacher, "I'm going to hold you accountable" when we've seen a district-wide increase by 15 percentage points of chronic absenteeism. Then you start to feel, can you hold people accountable with all of these external factors that are not normal? And should you? So the approach that I've taken is: Let's look at the data,



let's review the data. Let's talk about the data. Let's talk about trends; but I think we have to be careful when we talk about individual accountability for individual principals and teachers.

And one Denver district leader said, "There is a recognition that schools are more than their test scores. Public schools do things for kids and families like social-emotional supports and having culturally responsive practice to support positive identity development."

Although there was a near-universal perception that stringent accountability mechanisms such as school ratings and teacher evaluations should be put on hold or should not be as high stakes in the context of a challenging year when many students were not in school buildings for most or all of the school year, there are examples from both the charter and TPS sectors suggesting that school-level staff did not interpret the easing of accountability in the way that district leaders had described. In DC, Denver, and Detroit, charter leaders raised questions about what the interruptions to state assessments would mean for their authorization and continued operation. In policy contexts where test scores can insulate charter schools from threats of nonrenewal, these charter leaders were simultaneously grateful for a break and worried about the longer-term implications. As one Denver charter school leader noted:

My biggest fear is [that] going in next year we're going to be going into renewal. Whether we do these tests or not, I'm going into a renewal in a year when we don't have valid assessment data, when our best opportunity to have shown the improvement there and the gains that our schools made was lost. I don't know this new board, so I have no idea what they're going to be looking for, and I know they don't like charter schools. I'm scared going into my renewal next year because it's like going into a test and you don't know what you're going to be tested on.

A charter principal in Detroit said, "We still have growth targets and academic targets, we'll never not have those . . . We're still looking at trying to make sure 50% of our kids are up to speed. Usually we have about 70% of kids that make their growth target." And in rural Michigan, the superintendent noted that they continued to use assessments but lowered the stakes:

We decided to do a fall, winter, and spring testing . . . it's not high stakes. It's just informative. And it's helped us control our own process. We do it when we feel ready to do it. And we handle all the administration of it and the data analysis from that . . . Again, not high stakes, we create our own version of measuring that growth, and the teachers are in control of what those formative assessments are. And then we have real-time useful data.

In other words, accountability pressures did ease in the early pandemic, but campus and charter leaders were concerned that the short-term nature of these exemptions meant they would face the consequences in coming years, and they therefore continued to emphasize the importance of improvement on standardized assessments.

## **Student and Family Support**

### ***Communicating With Families During Crisis: Wide Variation Across Localities, No Sector Patterns***

Across the data, nearly every participant discussed the importance of communication with local stakeholders, particularly families. However, the type and quality of communication and the input sought from and delivered to families varied significantly.

Across all localities and sectors, leaders worked to keep families informed about school policies and public health matters, and there was consistently frequent communication early on in the pandemic, which evolved over time. For instance, a CMO leader in DC described the intensity and variation in communication over the duration of the pandemic:

We started with daily video messages across all of our social media channels that first week, trying to maintain a sense of normalcy and explain this. We did that for 3 weeks and it became clear that this is going to last longer than 3 weeks. And so then we moved to weekly emails, and then we went to biweekly emails, and then we were going to start to scale up, and we went to the weekly emails again, and now we have some video messages because we're starting school on Monday.

An analysis of district websites and social media accounts pointed to an emphasis on early, frequent communications. In many cases, district leaders had to rely extensively on online communications to ensure that information about closures, case rates, and modality, which was typically closely mirrored on individual school pages and social media accounts, reached community members. A number of districts, particularly those with a strong preexisting online presence, significantly accelerated the intensity of communication. For example, Portland Public Schools began releasing communications to the community via the district website on February 4, 2020, more than 2 months before the district fully closed. Throughout the early phase of the pandemic, individual schools and the district's social media account shared hundreds of posts, providing information on key decisions, soliciting parent and community member input, and celebrating student and teacher accomplishments.

However, across the cases we saw variation in the direction of communication. A subset of localities engaged in one-way communication with families (i.e., the district or school conveyed information to parents but did not have many systems or structures for formal parental input), such as the example with emails mentioned above. At these localities, leaders frequently shared critical and timely information with families but did not solicit much input. For example, one principal in a rural community explained how the school used a weekly newsletter to communicate with families: "We just keep sending the letters of 'we are recommitting, thank you for wearing your mask when you're picking your child up'."

Other localities engaged in two-way communication, eliciting families' feedback on local policies, primarily through surveys. Portland leaders described using focus groups and trained community members to gather information on technology issues and using this data to adapt to parent and family needs. One Portland administrator recalled,

We sat down with [a] 20-member team of community agents and basically trained them up on our focus group protocol, put it into a Google form, and within the first 2 days, they were out, calling people in Russian, and Spanish, in Mandarin. And we had all of these data starting to roll in, like, "This is why I can't log in, this is why I can't complete my work. I have a baby sister. Our house is small."

Officials in Portland and DC conducted town hall–like forums using virtual platforms in which community members could voice their concerns and opinions. Denver administrators also solicited stakeholder input. As one district administrator in Denver explained,

We did a student satisfaction and a parent satisfaction survey. That's been routine. But we've done more than one a year now with the pandemic. And of course, changed a lot of the questions to really get at the experience that they're having around remote learning.

District and campus leaders indicated that surveys and other forms of parent engagement helped to inform decision-making concerning closures and re-opening and whether there would be options for in-person, virtual, and hybrid instruction. For instance, one district administrator in Detroit explained how surveys helped to inform the district's modality decisions: "[We were] surveying families about whether they wanted in-person or whether they wanted virtual and trying to figure out what those percentages would be at each school so that the district could make some informed decisions." Surveys provided an ongoing method of soliciting feedback and adapting to parents' needs, ranging from in-depth, ongoing explorations of household needs to what one Portland leader described as brief, one-off surveys that served as a gauge for building reopening plans: "We did a couple of surveys for families to check in—How's it going? What do you need?—trying to help us build our hybrid plan."

Localities appeared to draw on existing communication structures during the pandemic. Those that engaged in two-way communication seemed to have those structures in place before the pandemic, perhaps a form of anticipation of future crisis or events that require such communication. One rural community in Michigan was an outlier. This traditional public school district engaged in the most robust family communication efforts of all the cases. Leaders in this community suggested that the pandemic pushed district leadership to become more familiar with their community. One district administrator explained:

If there was one positive thing that came out of COVID, [it was that] we were forced to make those connections with our families. We were forced to call them and say, "How are you doing?" . . . It was needed badly with a lot of our families. They hide a lot and they don't answer phone calls, and they're extremely stressed out. And you can't blame

them. They're trying to figure things out. But at the same time, when you have to create that meaningful connection, and the only way you can is by calling or knocking on their door and standing in the middle of their grass and saying, "Hey, how's it going," it forcefully made us do it even more than what we were doing in the school.

In this case, the district engaged more with families as a result of COVID. No other case described the response to COVID as deepening their relationship with the community.

#### **Parent Perspectives on School Communication**

Both across localities and within districts, how parents experienced communication from schools varied widely. Both charter and TPS parents voiced appreciation for extensive communication, although a common point of agreement was that the volume of calls and emails could often become overwhelming. One TPS parent in DC noted, "Because of the seriousness of everything, [the school] took care right away of how to get technology to the kids if they didn't have it, how to log on to programs... they were in constant contact with us, and it was a lot. But I was appreciative of it." Charter and TPS parents largely appreciated messages about both academics and COVID-related issues. As one TPS parent in Denver concluded: "Our school stayed very in touch, our district stayed very in touch. We always knew what was going on, how many cases, what our plans were, what they were trying to do, what their expectations were, the calendar."

At the same time, other parents expressed frustration with what they saw as a failure to communicate, especially about issues such as rising case rates or racial violence. Parents had mixed feelings about their input in decision-making. In Denver, several parents expressed their appreciation at receiving numerous surveys regarding their experiences and opinions. And in Sage, Oregon, parents also felt heard. One charter parent there noted that the school "did a couple surveys during the year, and I think that it was adequate." Alternately, in Detroit, TPS parents noted that even though they were not surveyed, they felt that the district was able to handle rapid decision-making adequately, as one parent concluded: "I do [wish they had asked]. But so do a lot of other parents. And I feel like that's why they went about it the way they did. Because everybody has their own thoughts, feelings, and opinions, and it would've been too overwhelming. And they had to make some decisions right away."

#### ***Meals and Technology: Similarities in the Distribution of Basic Needs***

The pandemic highlighted the important role that schools played in providing students and families with access to key services. Across all localities, particularly because most of our localities served a large proportion of students who came from marginalized groups, schools recognized the importance of addressing students' and families' basic needs.

[Insert Table 5 about here.]

A common theme in large urban areas was that, with the pandemic, there was greater recognition of the role of the district as a coordinating authority in terms of providing

nonacademic services to families and communicating with the community. Often the distribution of materials was centralized at a district level, especially early in the pandemic. For example, a district administrator in Denver explained:

We pooled resources, we had district laptops going to charter kids and vice versa. It was like, 'let's get tech out.' And it really was a family-of-schools approach towards it. Our buying power is huge, right? So we were able to actually get more laptops in a way that small single sites couldn't, but [charter management organization] is a big power and had a bunch of extra laptops and was able to help some folks out. We had tech distribution centers where it didn't matter what school you went to. It didn't matter what governance type; we'd write it down and give you a laptop.

In this sense, we saw charter schools come together with TPSs to coordinate and distribute technology to families, particularly at the start of the pandemic. There was increased collaboration across and within sectors to provide food resources to families in New Orleans, Denver, and Detroit. For instance, Denver Public Schools, which has a portfolio school model, coordinated food distribution for both traditional public and charter school families. In Detroit, food distribution was a rare dimension of collaboration in which the traditional public district offered free meals to any families, including those enrolled in charter schools.

Overall, across the cases, many leaders suggested that the pandemic reinforced how intertwined schools are with communities. One participant suggested that this recognition might be more of a change for schools in the charter sector, which tend to draw students from many neighborhoods. They noted that some charter schools have often relied on a "no excuses" approach, where they believe the child can be, in a sense, removed from their community and place, often ignoring structural inequities with the aim of improving achievement despite 'zip code.' A community advocate in New Orleans stated that the pandemic "forced [schools] to . . . really have to admit that you are part of a community, and you cannot, on a grand scale, impact children of New Orleans without addressing the needs of the communities that they come from." From the standpoint of providing concrete supports to students, a Denver central office administrator observed:

I think there's a lot of concern that there are kids who rely on school for so much more than just academics, and they're not getting any of that. So social/emotional support, food, obviously. We're doing a decent job of delivering food, but still. Food and academics and just a safe place to share what's happening in their lives.

This quote illustrates how school and district leaders quickly recognized some of the taken-for-granted components of school as a community hub and a place to receive other, noneducational and essential services. Overall, localities made meeting the basic needs of families, including providing food and technology, a significant priority in their pandemic responses, and we did not observe major differences between localities or sectors. More detail on the specific ways that school systems provided for student and family needs can be found in the appendix.

### **Perspectives on Basic Needs Provision**

Parents observed that basic needs were becoming a bigger priority for school systems as the pandemic unfolded, and many were aware that there was work being done behind the scenes to expand access to technology and provide meals to families. Basic needs were one of the key areas where district and charter efforts during the pandemic were most visible to parents. For instance, one TPS parent in Detroit noted, “[The schools] were great. They provided the computers. They gave us free Wi-Fi. We got set up with some free Wi-Fi so you can go to school. They had these COVID kits that they passed out, even though we were staying home. And the school was very, very active in the community.” A Portland TPS parent similarly recalled, “School, in general, supported us as much as they could. They were just winging it, too, I suppose . . . If I needed a food box, I would go up there and get a food box, and it’d be good stuff . . . I got her [my daughter’s] computer right away. It was easy to do. It wasn’t a big fiasco.”

### ***Students’ Social and Emotional Needs: Universal Prioritization and Differences in Readiness***

Across localities, parents advocated for an increased focus on students’ social and emotional needs, connecting this advocacy to conversations around equity. A charter school leader in Washington, DC, noted that mental health was among parents’ top three priorities during the pandemic. Districts and schools responded by offering a range of services, including mental health resources, wellness checks, and home visits, often by partnering with local community-based organizations. In rural Michigan, for example, schools conducted “wellness checks” to “check in, see how they’re doing,” and “did a lot of social-emotional work with the families.” They also “created a heat map that was filled out by teachers every week” to indicate which students were facing challenges, which was used to then follow up with particular students through the counseling department. The focus on social-emotional learning was, in part, made possible by the easing of accountability pressures. As one Detroit charter principal noted:

By reducing the number of standards that we’re focusing on each term, that allows learning opportunities for teachers to engage and interact with students regarding social-emotional learning, providing a lot of resources where they can—and surveys that they can utilize in their small groups.

Despite overall similarities in the type of response, we saw one key difference by sector. More charters already had social-emotional learning (SEL) curriculum embedded in their core academics prior to the pandemic than TPSs did. One Denver charter school leader said, “We have many charter schools that have a focus on social-emotional supports as part of their original design.” Denver Public Schools was the only TPS system that had a program before, but it was not as robust as that of the charter schools, as Denver Public Schools did not have a uniform curriculum to share with campuses. In sum, across localities, SEL becomes more of an

academic priority, tied to socialization, building social skills and academic success, but charters were generally more prepared to operationalize that priority.

## **School Operations and Human Resources**

### ***Teachers and Staff: Innovation in Managing Shortages***

We found some variation across localities in terms of supports for teachers and staff, and charter systems demonstrated more innovation in responding to teacher shortages than did TPSs. Almost all localities provided professional development for teachers related to virtual learning. The biggest differences we observed were in how school systems responded to teacher shortages and absences.

Although we did see some cases of innovation in response to teacher shortages in the TPS sector, we saw more such examples in the charter sector. In the rural TPS district in Sage, Oregon, teachers were provided with childcare for grades kindergarten through seven when they were required to come back to the classroom. This effort was intended to prevent teachers from quitting because of child care responsibilities.

In charter schools, there were efforts to create substitute pools or to overhire staff. A CMO in New Orleans had its own substitute bank, whereas the rest of the district faced severe shortages. A charter school leader in New Orleans said,

There were times where folks had to take off because they were sick or they have COVID issues. We were always able to manage and it didn't affect us. We weren't pulling our hair out. . . . We have a sub pool that's provided by [our CMO]. We had enough subs in there to keep us covered.

Likewise, a charter CMO in Denver “overstaffed” in the summer in anticipation of teacher absences arising from COVID, and a group of independent (non-CMO) charter schools created their own academy to address staffing needs online. Recognizing their limited capacity to provide enough teachers to cover both in-person and online classrooms, these standalone charters collectively hired teachers to provide online instruction to cohorts with combined student populations. In contrast, a Denver Public School district leader noted that “schools have had to shut down at various points because they didn’t have enough staff.”

In Detroit, too, there were some differences across sectors, where TPS teachers were given the option to work in person *or* online, because of labor negotiations, whereas charter schools did not provide teachers with that option and therefore had fewer staffing issues. One Detroit charter school management organization leader noted that administrators were working to provide “some stipends and stay bonuses” to retain teachers and were pursuing partnerships with universities to create fast-track pipelines to the teaching profession.

### ***Transportation: Constrained Resources and Increased Centralization***

Initially, there was little demand for transportation, as most students were learning from home. However, as the 2020–2021 school year continued and more students went back to school in person, transportation capacity threatened access to educational opportunities, particularly for marginalized students who might not have had another way to get to school. Transportation costs were high before the pandemic, and bus driver shortages combined with the need to socially distance students on buses meant that the costs of transport were even higher than before. Some school systems limited in-person instruction because of these capacity constraints. For instance, in Denver, secondary school students were not offered in-person instruction during the first semester because of a lack of school transportation capacity. A Detroit charter leader also expressed that transportation played into decisions about modality, noting that the school had to secure a new bussing contract to provide hybrid instruction. Charter and voucher leaders in New Orleans also expressed concern that they could not provide adequate transportation to support students in connecting to school.

When transportation was provided, there were some differences in coordination between TPS and charter schools. Among Denver and New Orleans charter schools, there was *an increase in centralization and oversight of transportation* during the pandemic. In Denver, this meant that charters that used district transportation were now told what their bell times needed to be, to align with the bus drop-off schedule. One charter leader lamented that this change had lost them an hour and a half of instructional time a day:

I just feel we're under the direction of the DPS central way more than we ever have been. Some of it for very good reasons. I think the biggest example is we've always set our own calendar year and schedule in terms of daily hours. We basically surrendered control of that this year; all charters did, because of busing. Because [of] the . . . limitations on the number of kids on the bus to maintain social distance on the bus. Then the district had to come up with a very complicated bussing plan. Basically, they were like, "This is your bell time." . . . We lost an hour and a half a day of instruction for our kids, which is not what I would've wanted.

New Orleans charter leaders reported that the district coordinated all the schools, communicated health and safety guidelines, and helped schools make decisions about how to coordinate their busing.

Concerns were present across localities and sectors about students from marginalized groups and how transportation might influence their access to school and other resources. In Denver and in Teal, Michigan, leaders expressed concern that new immigrant students and Indigenous students, respectively, were most vulnerable to the reduced transportation capacity. In Teal, school staff lamented that COVID had disrupted their individualized transportation supports for students who lived on a nearby reservation, so they did not feel comfortable doing individual pick-ups during the health crisis. In Denver, a district administrator stated that buses were used



to deliver basic needs supplies to newcomer families, because the administrator thought many of the families would not have their license to drive.

## **Summary of Patterns in COVID Response**

Our 16 months of research revealed patterns of similarities and differences in school and system actions taken to cope with COVID-19 across localities. Generally, we found more similarities than differences in school and system responses to the pandemic. In summary, we found that:

- Across localities and sectors, schools responded to the crisis in *similar ways* when addressing basic needs (meals and technology distribution), assessment, and social-emotional learning.
- We saw some *variation* across localities and sectors in their approaches to staffing and family communication and input (e.g., one-way or two-way communication, and the extent of centralization of information across sectors).
- Although we initially saw *similarities* in modality (all schools in our study closed for in-person learning in spring of 2020) and in reopening timelines across localities and sectors, we did see some *variation* in reopening decisions regarding fall of 2020, including by sector and geography, with some charters and rural districts opening for in-person learning sooner or remaining open for more of the school year.
- We also saw *variation* in the type of collaboration or centralization across locality, but some within- and cross-sector partnership was a common theme across the places we studied.

We discuss the factors that drove these similarities and differences next.

## **Findings Part 2 – Factors That Shaped Response**

Here, we provide insight on what appeared to shape the patterns in the coping responses reported above. We ask, for example, why were there general similarities in the distribution of basic services (meals, technology), yet variation in communication (one-way or two-way) with families during the pandemic? Why were there similarities in modality in spring of 2020 and in reopening timelines in Fall of 2020?

In this section, we answer:

### ***Research Question #2: What conditions help explain differences and similarities across organizational contexts?***

As illustrated in the previous section, leaders had to make difficult decisions about a range of issues during the pandemic. Here we illuminate the complexity of organizational and contextual conditions that drove their decisions, including the sociopolitical, geographic, and economic forces that together influenced their response to the crisis and help to explain similarities and differences across localities and sectors.

Where we see variation in pandemic coping practices across localities, we find it is due to political dynamics (e.g., state policy requirements, teacher union strength); prior governance structures; changes in competitive pressures; and geographic contexts (e.g., differences driven by urbanicity or rurality). We find largely similar responses across sectors from charter and TPSs, because they faced similar political and diminished competitive pressures at each locality, particularly at the start of the pandemic. As the pandemic continued, however, we see charter schools exerting their autonomy to open earlier in some places or remain open longer in others. As the initial period of crisis and extreme uncertainty ended, charter leaders were less concerned with replicating practices in TPSs, though still following public health guidance.

We first discuss how prior governance structures and experiences with collaboration shaped pandemic response before turning to politics, changes in market pressures, and geographic contexts.

### **Existing Governance Structures and Prior Collaboration**

As noted earlier, the crisis conditions during the early months of the pandemic motivated new collaboration and centralization between and within school sectors, particularly around basic needs, health protocols, and online learning guidance. As leaders worked to provide meals and technology and communicate with families, we saw that a key coping strategy was that schools worked across sectors, sometimes through informal collaborations and other times by centralizing services for families. We observed collaboration, in terms of sharing resources and guidance, around online learning and food distribution. We observed centralization, as in a move toward centralized decision-making and authority, around health protocols, communication, and transportation.

Prior governance structures and past experiences with cross- and within-sector collaboration strongly influenced whether charters and districts partnered in some way during the crisis. Detroit and New Orleans are useful cases of comparison, given their high numbers of charters but different histories with school coordination. Although both cities have decentralized school choice systems, in which charters operate autonomously and there is limited centralized decision-making across all schools, differences were seen in the level of coordination during the pandemic.

Detroit has a fragmented school system, in which charter schools operate independently from the traditional public school system. Charter schools are authorized by a variety of institutions, including universities and the public school district, and no central organization oversees policies such as enrollment. Families instead apply directly to charter schools, which have little oversight from authorizers and few mechanisms to coordinate practices across schools. During the pandemic, there was no centralization across the TPS and charter sectors in Detroit, and the only dimension of cross-sector coordination we recorded was that the Detroit TPS system offered free meals to all families, including those with students enrolled in charters. Although leaders made similar decisions regarding online learning and health protocols, we found no

evidence of centralized decision-making or even formal communication between charter and TPS leaders in Detroit.

In contrast, leaders in New Orleans had a highly coordinated response to the COVID crisis—which may relate to prior organizational structures and governance arrangements. Before the pandemic, New Orleans operated a “managed market” (Bulkley et al., 2020). All schools were autonomous charters that were authorized by the Orleans Parish School Board. The central office—New Orleans Public Schools (NOLA-PS)—served as a central governance institution that oversaw several centralized policies. For example, all schools participated in a centralized enrollment system and adhered to some common regulations (e.g., provision of special education, expulsion policies).

Throughout our interviews, NOLA-PS district leaders and principals echoed the importance of having a “whole system” or centralized response during a State of Emergency, arguing that it was best for students and families to have consistent and clear communication. As one New Orleans system leader said:

Understanding collaboration and how if you have a State of Emergency, you may enjoy your daily “power,” but in the case of an emergency, it’s more beneficial for everyone especially the students and families that we serve, to acquiesce your power to one authority to actually be able to guide a whole system of schools through one singular event. I think that’s a lesson learned, and I think we all realize that even though they may have been questionable as we were doing at the very beginning, it was the right decision and we have a good model to follow if we are ever in this situation again.

New Orleans leaders created a system-wide taskforce that collected information on online learning needs and coordinated on school reopening decisions. The task force included about 40 stakeholders, including elected school board members and the mayor, and, according to one leader, it built out

those values, guiding principles, and then we brought pieces and components of the roadmap to this group to focus group it with them, and really to get their buy-in, so that when we had the final product in mid-July and we released it, there was this big group of people . . . that had all seen it as it was getting put together.

Another district leader noted,

We’re different, and most districts are centralized. We’re not the norm, but when you look at having a decentralized district, and having about 36 different organizations to say, “Hey, listen. We’re going to have to close school potentially . . . who can staff up a feeding program, for example?” They’re able to go to their providers, analyze what they had on reserve in their kitchens, and say, “Okay . . . we’ll volunteer. We can do day one.” “We can’t do day one, but we can do by Thursday of that week.” . . . What we’re able to

do is we serve as coordinator and organize the information and then push out the information as a singular voice.

Although New Orleans is largely a decentralized all-charter system, prior experience and a history of centralized policies, including a citywide enrollment process, may have contributed to the coordination during COVID. Having a school board and staff with some ability to communicate across the system laid a foundation for the possibility of coordination during the crisis.

We saw other districts also draw on prior collaborative experiences to collaborate in new ways. In Portland, the charter school program office in the district had previously operated as a convener to share new information from the district with area charters. During the pandemic, the office leveraged this existing structure to create an invaluable network for charter leaders where they drew on each other's experiences to inform crisis decision-making and learn important lessons that they could take back to their own schools.

In DC, the longstanding relationships between the public health department and the public school system helped in quickly coordinating responses to COVID-19 as well. In discussing the role of the Health Department in schools' response to the pandemic, one DC leader said,

We actually do have a history of collaborating pretty closely on things like regular school vaccinations for example, . . . before all of this started . . . And we also collaborate on other things related to mental health, nursing contracts in schools. Again, that presents its own challenges, but the systems are there.

In contrast, across localities, we found that the charter sector did not have the same relationships with public health communities that the TPSs did and that, in some ways, they relied on TPSs for guidance. One CMO central office administrator said: "I actually think it's much better to leave giant safety decisions to the district leadership . . . they have more access to public health leaders, and that's who should really be informing these decisions at this point." As this quote suggests, some charters saw TPS decisions as legitimate indicators of public health safety, and they may have believed that acting in concert with TPS and public health authorities would legitimize their decision-making to staff and families.

We saw similar patterns among private schools in terms of seeking legitimacy by drawing upon traditional public schools' practices. Private schools in our study (in New Orleans) were more autonomous in their decisions than charter schools; yet they defaulted to following what districts and charters were doing. One private school leader said she had "100% freedom and flexibility" but "of course, I looked to the state for guidance, and I looked to the local school districts to see what they were doing, which is what we do when we make major decisions like that. But we were able to make 100% of our decisions." In this case, although she had complete autonomy in schooling decisions, the school ultimately decided to follow TPSs by closing and reopening at the same times. Public, charter, and even private leaders appealed to and embraced public health guidance because it helped them establish legitimacy in a politicized

public health climate, and because coordination was easier when there were existing systems of shared decision-making around health issues, like vaccinations.

In some places, especially New Orleans and Denver, there was not just collaboration but also increased centralization around health protocols and school transportation. Charter school leaders in Denver appreciated that they could turn to the district, their authorizer, for direction about how to respond to the health crisis. One Denver charter leader explained:

Those things [health guidance] came down from either CDPHE [Colorado Department of Public Health & Environment] or Denver Health. So if I wasn't attached to a district, I'd be able to get that information. And follow it myself. It was nice to have DPS kind of digest it for you. And then kind of give you the highlights of best practices. And then basically, "This is where you're able to be autonomous and kind of do what you want." . . . Again, it's nice having an authorizer. They make things a little bit easier for you.

Although Denver charter school leaders expressed some ambivalence about having to follow new directives from a centralized authority, the district guidance did provide a stopgap in the midst of the immediate crisis. Then, as they learned more about what their families wanted during the pandemic, they were able to shift back to more autonomous behavior.

### Learning From Previous Crises

Organizations may adapt to crises by reflecting on experiences, learning from them, and, critically, engaging in a process of organizational change that allows for members to anticipate and cope with the next crisis (Duchek, 2020).

Many of our case districts had experienced major crises prior to the pandemic, which helped them anticipate the changes brought by COVID-19. Although the pandemic was a crisis on a global scale, our localities had also experienced major disasters, including external shocks such as hurricanes and fires. These experiences helped school systems and states to anticipate and adapt to future crises, including COVID. And experiences during COVID, in turn, prepared them for unknown crises in the future.

In Colorado, the fires prompted states to collect contact information for charter schools and centralize that at the state level, creating a new database, which state leaders were then able to draw upon to organize for the COVID-19 response as well. In New Orleans, systems and policies set up to respond to hurricanes were also employed in response to COVID-19. We explore this case in more depth to illuminate how prior crises influenced schools' responses to the pandemic.

In New Orleans, as with most places we studied, organizational learning was a continuous process in which past experiences informed how schools adapted to COVID-19, and their experiences during the pandemic informed planning for future unknown events. Reflecting on the first year of COVID, one district leader noted: "Once everything got going, that's when the

relationships between each other [became more important] . . . [we asked] ‘What have you learned? What have I learned?’ And that’s how the district I think was able to iterate so fast.” In New Orleans, adaptation meant schools constantly iterating in areas such as pedagogy, instructional technology, and communications.

Unlike other disasters and states of emergency, where the school district can make decisions about all public schools, individual charter schools had autonomy, but opted to voluntarily give up some power to the school district during the pandemic. In Louisiana, charter schools are their own local education agencies, or districts, taking responsibility for all decisions regarding school operations and management. During the pandemic, they opted to let the central office become the lead and make key decisions regarding communication with families about meals and technology, canceling sports activities, and scheduling or school in-person hours. One district leader said:

When a hurricane is coming and the governor declares a State of Emergency and he signs his executive order stating that, all the power goes out the window in that moment and then it’s a singular voice. In the pandemic, even though this is a disaster, it was not under that kind of order, so actually schools had to actually give their power over to the district in some areas so that they could be a singular voice and allow the district to lead on this.

For example, charter schools voluntarily agreed to let the district set the hours and days of the week for instruction, which, according to a district leader, meant that “the public [was] able to understand that there was some consistency because we felt if schools were all over the place, it would destroy all of us. We were able to work with schools.”

Schools in New Orleans also described using technology to ensure continued instruction despite disruptions from the pandemic and from hurricanes and flooding. One private school adopted a hybrid program because of Hurricane Katrina, and with COVID, they expanded that program to include Zoom:

I’ve been teaching for 20 years and part of the reason I chose an online curriculum is what happened when we left for Katrina. When we had to flee the city for Katrina, many of our—if you had books, they were flooded and we could not figure out what grades the kids had, what level they were on. So I chose an online curriculum because it was easy for kids who evacuated to just continue working, whether they went to Atlanta or Texas or wherever.

This leader described how prior crises led her to adapt the modality of instruction to weather future crises. Although this was an unusual case of a private school with a hybrid curriculum, many charter operators and district leaders in New Orleans and at our other cases believed they would continue to offer some form of remote learning to meet parent demands, and one administrator suggested that doing so would allow them to be more flexible when another

crisis arrived, such as a hurricane. A state leader noted the value of building technology-related capacity for future crisis response:

From now on moving forward, every school is going to have to have a plan. Particularly because we're a state that does get shut down with hurricanes from time to time. Or your students get relocated. It's actually a blessing that a kid could get relocated and then quickly still get up and running on some school platform. And so they know, moving forward, that this now has to be more focused.

Indeed, Louisiana was hit with hurricanes (and hurricane scares) during the pandemic. Another district leader echoed this idea of how New Orleans has “benefited from the past experience” and has a “sense of community and the need to address a really terrible issue together.”

## Politics

### *Influential Actors and Political Dynamics in Moments of Crisis and Uncertainty*

Directives, guidance, and political power of state leaders, district and school leaders, and public health officials shaped some of the differences in COVID response we observed in our study localities.

For the 2020–2021 school year, states mostly devolved responsibility for reopening decisions onto districts; still, there are a few ways in which state leaders and lawmakers influenced school reopening and other decisions. In all five states in our study, **governors** and their **state agencies** issued health guidance, but the degree to which they required schools and districts to adhere to this health guidance varied. In some states, these requirements were more stringent, and in others, districts were given more discretion. In Oregon, for example, the governor not only required districts to submit safety and reopening plans but also set explicit COVID-19 case-rate thresholds that districts needed to follow when deciding to open or close their schools. It was not until several months into the pandemic that Oregon changed those thresholds from mandatory rules to recommended guidelines. In Michigan, districts were required to submit instructional and safety plans detailing how they would provide instruction through different modalities, the health and safety measures they would implement, and how they would serve students with unique educational needs. Schools in Oregon and Michigan, with their more stringent requirements, opened in person later than schools at other locations or had more periods of closure.

In Louisiana, the state issued minimum guidelines, but New Orleans charter schools typically adopted guidelines that were “stricter than the state’s guidelines,” according to a state policy advocate. There, then, the charter school association played a significant role in interpreting and creating guidelines for schools to reopen, which helps to explain why schools phased in their return to in-person learning and then closed again with high case rates. The governor in Colorado provided even greater discretion to districts, only encouraging districts to consult with local health authorities as they planned for reopening and not requiring plans. This reality might

explain why it was possible for there to be a big push for a return to in-person learning in Denver in Fall 2020.

Many state leaders also adopted school finance policies (“hold harmless” policies) to maintain schools’ funding despite enrollment changes arising from the pandemic. These policies also influenced the patterns we observed, and we discuss the role these policies played in a later section on decreased competitive pressures.

Because states left many decisions to the local level, particularly concerning reopening in the Fall of 2020, district and school leaders were the primary decision-makers during the pandemic (Marsh et al., 2022). These decisions (e.g., regarding modality and how to provide services to families) were often political, as many groups of actors with differing values and preferences had something at stake and were seeking to protect their interests by using whatever resources they had to influence these key decisions.<sup>5</sup>

As noted earlier, one key factor in explaining similarities in responses to the pandemic was the role of **national and local health officials**. In particular, across localities, we saw district leaders and teachers’ unions invoke public health guidance to advance their interests, which was a key driver of similarities across localities. Furthermore, we saw charter and private school leaders deferring to traditional public schools, which led to similarities across sectors.

National and local health officials mostly influenced decision-making through their guidance and communication to the public. To reassure the various actors who sought to influence their decisions, district leaders appealed to health and safety guidance to argue that they were making informed and safe decisions for students, teachers, and families. In some cases, however, this public health role and influence was formalized, as in Washington, DC, where the public school district included local health officials on its decision-making committee; and in Denver, district leaders consulted frequently with local health officials, who saw themselves as serving in a direct advisory role.

Both charter and TPS leaders described relying on public health guidance in deciding whether and how to reopen schools, which led to some similarities across localities and sectors. However, as the pandemic wore on, a majority of charter leaders became more comfortable exercising their autonomy and making modality decisions based on their own communities, as we saw in the fall of 2020, yet they still relied heavily on public health guidance.

When reopening schools in the 2020–21 school year, TPS district leaders once again turned toward public health guidance to inform and provide legitimacy for their decisions. For example, a district leader in Portland stated: “Well, I don’t need the community thinking that I am unilaterally deciding what’s safe or what’s healthy. I need professionals and subject matter experts to tell us, ‘These are the guidelines.’”

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<sup>5</sup> For a more comprehensive analysis of the political dynamics of reopening decisions across the urban districts in our study, see: <https://www.edworkingpapers.com/sites/default/files/ai22-605.pdf>.



In some cases, charter leaders continued to follow TPS actions involving reopening decisions. As one charter leader in Denver explained: “So the plan basically is now follow the districts because they’re working with our public health authorities.” In DC, the mayor involved public health officials directly in the reopening planning, which helped establish a plan to delay reopening until the winter. Some small charters followed suit, but larger CMOs were able to bring “more people back faster,” according to a system leader, because they had the resources and infrastructure to do so in line with public health guidance.

Charter and TPS schools in Detroit also similarly prioritized public health guidance to inform their decisions around re-opening schools, both when and how. For example, a Detroit public school leader explained that the district “tried to outline everything that the CDC had said about guidance on reopening and implement and commit to everything.” Similarly, a CMO leader in Detroit explained that there was “fear from teachers, staff, parents, students” as they sought to return to in-person or hybrid instruction in the spring of 2021, and therefore they prioritized “really listening, following science, the guidelines from the CDC.” Although this CMO reopened its other charter schools earlier than TPSs across the state generally, in Detroit, their charter school remained closed for longer during the winter, similar to the TPSs in Detroit. In this way, they appeared to again follow the lead of the nearby TPS district. However, some charter schools in Detroit did remain open in December and January (see Figure 2), when all TPSs were closed, suggesting there was more variation in the charter sector.

### ***District-Labor Relations and Labor-Market Conditions***

Reopening and other important coping decisions were also strongly influenced by union-district relations, perceptions of teacher well-being, and teacher labor market conditions. Across all of our cases, school and district leaders acknowledged the hardship teachers faced during the pandemic and emphasized the importance of supporting their well-being. In many cases, leaders also expressed concerns that teachers might quit, retire, or move to another district/school during the school year, leaving them with staffing shortages. TPS districts in each locality collaborated or entered into formal bargaining or discussions with teachers’ unions to establish health and safety conditions and instructional expectations. Comparable concerns regarding teacher well-being and teacher shortages, and divergence in union leverage and influence, were similarities and differences in our cases.

Teachers’ unions pushed for measures that would improve health and safety conditions, with appeals to the health guidance. As one union leader in Detroit put it, “Let’s stick to CDC guidelines . . . mitigation strategies that include but aren’t limited to PPE, face masks, six feet of distancing, hand washing, proper ventilation, let’s get to the same guidelines here.” They also sought lighter burdens on teachers given the challenging instructional context. For example, the Portland union ensured teachers would either teach virtually or in person, but not at the same time. In urban traditional school districts, teachers’ unions secured certain conditions for teachers by establishing memoranda of agreement with districts. Differences in the strength of teachers’ unions led to some variation across localities in terms of negotiated conditions for reopening and closing schools, as described in the vignette below.

Much like TPS leaders, charter school leaders were sensitive to their teachers' concerns and the state of the teacher labor market, even without unions with which they had to negotiate. Urban charter school teachers in our study, almost none of whom were unionized, often also secured health and instructional conditions they desired, as school leaders consulted with them. Even without organized pressure, charter school leaders attended to teachers' voices, as the leaders faced labor market conditions and concerns similar to those confronted by traditional schools (e.g., concerns about keeping teachers safe and ensuring they did not leave for other schools or districts during this difficult time). For example, a charter school leader in Denver explained how teachers influenced a decision to suspend in-person instruction during a spike in COVID-19 cases: "My teachers are like, 'We signed up for 2.8%, we did not sign up for 12.2% positivity rate in the county.' And they weren't wrong. And it was such a collective voice that I needed to honor them."

In another example, New Orleans, which was an all-charter district with only a few unionized schools, was slower to reopen than surrounding TPS districts. This situation was due to a variety of factors, including student population and parent preferences, but was in part driven by fear of teacher pushback. As one district leader noted:

I think that we did look [at surrounding districts] and go, "Wow. They're really testing the boundaries of comfort here," and sort of like moments of just shock that they were able to do what they did. Not because they were wildly successful at it, but they've opened up and they've put a lot of kids in school so quickly and their teachers didn't shut them down, which was sort of interesting.

The threat of teacher exit or pushback appeared to drive decisions across localities and sectors, all of which struggled with similar staffing concerns. CMO leaders and charter principals were worried that teachers would quit or retire if leaders pushed too hard for a return to in-person instruction, which would create burdens for the school down the road. For example, one CMO leader in DC explained that they were worried because "this year is by far our best retention year we've ever had . . . [but] I'm now worried about a cliff. . . . Two years from now or a year from now, we're going to have 30% of teachers leave or something like that." Therefore, charters were also responsive to teacher preferences; they either gauged teachers' comfort levels before making a reopening decision or allowed them to choose between remote and in-person instruction.

However, as noted earlier, some CMOs were able to hire extra staff in the summer or build pools of substitutes in anticipation of losses and absences during the academic year. This flexibility in hiring capacity might be attributable to the charter sector; it may not have been possible to overhire staff in TPS districts.

Teacher unions in DC and Detroit engaged in a contentious process to establish a memorandum of agreement (MOA) with the public school district. Differences in the relative strength of the unions and in the intensity of strategies by the unions led to different outcomes. In Detroit, the

union authorized a strike during the writing of the MOA to gain leverage. In response, the district made a significant concession: It allowed teachers to choose whether to teach in person or remotely in 2020–2021. About 95% of Detroit public school teachers chose to teach remotely, significantly limiting the district’s ability to offer in-person options for most of the year. In DC, the mayor worked with a task force that did not include union leaders and established a plan to reopen schools after the first half of the year without them. The union engaged in a combination of tactics, including taking a strong stance in the MOA process and engaging in broader communication with teachers and families throughout the city—but the union never seriously considered a strike vote. Consequently, the union had less leverage, and although it secured several public health assurances, it did not successfully change the terms of reopening. Importantly, even though the district in DC had greater leverage over the union, its reopening timeline did not differ significantly from Detroit’s, given the way adherence to public health guidance influenced its reopening timeline.

Without unions, did charters reopen sooner? In both Detroit and DC, the answer appears to have been no. Our data indicate that charter schools in both cities were constrained by labor dynamics, even without the direct pressure from unions. As noted earlier, a statewide CMO in Michigan that had reopened its schools generally kept its Detroit campus closed, in line with the TPS district. Across sectors, leaders expressed concern about teachers’ wellbeing generally and specifically about teachers quitting or retiring, which would leave them with vacancies. For example, a CMO leader in Detroit explained, “We’re looking at teacher retention . . . It was hard to attract quality teachers before. So now, a lot of people are just leaving the profession period . . . That’s been kind of our big initiative right now because we’re anticipating an even larger teacher recession.” As a result, much like leaders in the traditional public schools, these charter leaders felt pressure to attend to teacher needs and therefore made similar decisions, for example allowing teachers input into whether they would teach in person or virtually when schools reopened in Fall 2020.

In rural Michigan and Oregon, the public school districts and teachers’ unions had positive prior relationships, and district leaders described themselves as collaborating rather than negotiating with the unions. A district administrator in Sage, in rural Oregon, noted:

I think for the community, there was a big push to have kids back in person, and I also think that the teachers felt that they taught them more effectively when they were in person. And we thought for students' academic and social emotional wellness, the more we could have them where we could work with them was better for them . . . the majority of our teachers also wanted to be back in school, so we were really fortunate.

In one of our rural Michigan districts, a district administrator described how, instead of working with the school board, the district leadership worked with the teachers to develop their plans, and this approach created a symbiotic relationship between the district and labor groups while sidestepping the board. In these rural contexts, where district leadership and labor were aligned, we saw earlier opening of schools, with less contention, and schools remained open longer.

## Diminished Competitive Pressures

Another key reason we saw more collaboration—and similarities in COVID responses across sectors—was a decrease in competitive pressure, driven largely by state policies. Based on the assumptions regarding school choice in general, competition for students and families, combined with greater autonomy in the case of charter and private schools, will spur innovation. Without the pressure to compete for students in the market, limited innovation and less differentiation of practices among schools might be predicted.

As witnessed across the country, state legislatures implemented education policies that would help schools and districts address the difficulties of the pandemic, particularly declining enrollment (Dee et al., 2021). Lawmakers in most states passed “hold-harmless” bills that connected current-year funding to past attendance or enrollment (Center for Public Education, 2021), which (along with federal funds) helped prevent districts from facing a budget crunch in the middle of a crisis. Urban district and school leaders in both sectors felt that the hold-harmless policies relieved some competitive pressure. Key examples include Detroit, where the public schools’ enrollment dropped by about 3,000 students, and Washington, DC, where charter schools felt less pressured to compete for enrollment. Districts also took some action here. For example, Denver Public Schools invoked a state policy allowing schools to get funded on a three-year enrollment average, which also helped ensure schools would not suffer from declining enrollment; and the Portland Public Schools gave charter schools access to the district’s bulk purchasing channels, enabling some cost savings.

Because of these “hold harmless” policies, schools were under less pressure to attract and retain students given that their budgets would not be immediately affected. As one reform advocate in Denver noted, “I don’t think there are any market incentives for schools to grab more kids or hold them, which will be an interesting thing to follow.” Without competition, schools across sectors may have felt more able to collaborate to respond to the pandemic and might have been more willing to mimic one another’s practices, which would help to explain the similarity we saw across sectors in COVID response.

One CMO leader in New Orleans did note that some families left for private schools, “It did happen . . . some families, they did transition to go to independent or Catholic schools that were actually in school [in person].” However, these numbers were relatively small or not of concern during this period, when charter schools’ budgets were not affected, and therefore they did not change their practices or take actions to address these losses.

Despite this drop in immediate enrollment pressure and competition, some charter schools nevertheless felt an inherent competition or comparison with TPSs that drove some of their COVID responses. Several charter school leaders implied that aligning their responses with those of TPSs may have assisted with managing future competition. For example, a charter school administrator in Portland expressed concern “that if the charter schools can’t offer the same options, they won’t look like a comparable option anymore.” Likewise, a charter school leader in Denver (from a different CMO than the one cited above) recalled deciding against re-

opening sooner than TPS schools planned to do so because of the competitive pressures and risks: “I remember someone saying, ‘Y’all are going to open ahead of the district? You better not screw it up, because you have thousands and thousands of eyeballs on you.’”

Although we generally found that competitive pressures were diminished during the early period of the pandemic, we did observe some competitive behavior and differentiation in a few cases. As noted earlier, some charter schools opened sooner than their TPS counterparts. Also, in rural Michigan, one district leader reported that school districts were using masking policy as a form of marketing:

Early on we had school districts and charter schools using mask or no mask as marketing. Like I found that fascinating in the sense of, when else can I remember a time when public health—either following public health guidance or not following public health guidance—was used as a marketing piece? But we did have local cases where marketing of “we don’t require masks of students” was actually a thing.

In sum, diminished competitive pressures may have played a role in advancing similar pandemic responses across sectors—though in some places, the drive to stand out remained strong despite the broader shifts in the school choice market.

### **Geographic Context: Rural and Urban Contexts**

Another key condition shaping COVID responses and helping to explain the patterns we observed is geographic context. As noted earlier, the rural districts in our study typically began reopening and offering in-person instruction sooner; described less contention around reopening (e.g., Teal and Jade, compared with Detroit, Michigan); and had more centralized communications with families during the pandemic compared with the urban districts in our study.

Several contextual conditions likely contributed to these geographical differences. The wide structural inequalities that existed in many of our urban areas might have shaped what schools could do to respond to COVID. Initially, especially, given the high poverty levels, schools in urban contexts needed to provide basic needs, such as meals, and all localities focused on that. In addition, the pandemic highlighted the fact that many marginalized families did not have the resources to access educational services virtually. Our urban districts primarily served low-income and racially minoritized families, and as such there was a critical need to address meal delivery and technology first, before any further innovations or strategies could be adopted. Therefore, it is perhaps unsurprising that we saw little variation across sectors (or within sectors) in these places with respect to how they delivered these services, and we saw more efforts to coordinate and centralize these services, which also explained the lack of cross-sector variation at each urban area.

The different populations in our rural and urban contexts also had different demand for in-person or virtual instruction. There was more demand for in-person instruction in rural areas

compared with urban areas, where we heard strong demand for virtual options. In our urban localities, according to system leaders in both TPS and charter sectors, there was low community demand for in-person return to schools in the predominantly Black districts of New Orleans, DC, and Detroit, so those places continued to offer remote options for most families. For instance, a charter school leader in Detroit shared the results of a survey at the end of the 2020–2021 school year: “Each one of our schools did surveys and, based on the surveys, . . . decided. So, for example, the one school that I’m thinking about, 92% of the parents didn’t want their children to be in school.” In Detroit, the public school district offered a limited in-person option in the fall: About 5% of classrooms offered in-person instruction, and otherwise schools were open as “learning centers” for students to participate in remote learning in the building. The higher COVID rates and racialized differences in demand (reflecting greater risk of COVID-related health complications in Black communities) might have further driven differences in reopening decisions in urban and rural contexts.

In contrast to urban contexts, families in the rural communities in our study were largely supportive of returning fully to in-person learning. For instance, one leader in a rural district in Michigan reported: “We’ve had schools open for face-to-face [learning] in September [2020].” In rural Oregon, a district administrator described using his network at the state level to help open schools as early as possible in response to parent and community demand, arguing that “we’re rural, your metrics don’t really work, here’s why,” which ultimately led to their district being able to offer more in-person instruction.

This district, however, like our other rural areas in our study, did offer a virtual option through a virtual academy. Both the charter school and TPS districts in rural Michigan also offered a remote option while pushing for in-person instruction as much as possible. As one TPS leader in rural Michigan noted: “We were only forced in remote when the governor put in the order. So I guess the [governor] closed us down for a window of time, but other than that we’ve been open in person.” In our rural district in Michigan with a sizable Native American population, a rural leader described how the district created a virtual option for Native American families who were hit harder by the pandemic; the leader said, “a lot of our families chose that,” at least initially, and then the district gradually returned to in-person learning.

The small size of rural school systems also contributed to coping strategies and patterns observed across localities. First, the small size facilitated communication with families, as central office staff often had personal relationships with families and fewer numbers to contact. These systems’ smaller size and relative homogeneity (compared with our urban localities) might have also facilitated more community cohesion and alignment regarding what families felt the district should offer. In rural districts, leaders described having a lot of support from parents and community members for opening in person and were able to open up right away in the Fall of 2020, only closing alongside the other areas in the spring because of state orders.

The geography of rural districts and structural limitations facing families in remote areas also constrained these districts’ ability to provide virtual instruction, which might also explain the decision to prioritize in-person instruction early on. Limited Wi-Fi access and poor connection

quality in rural areas created significant challenges for the rural areas. One leader of a rural district in Oregon noted:

We ordered a bunch of hotspots . . . and we had some places in a rural area, the hotspots didn't work, so we figured out a way to use what could work to get everybody that has access. We can get the hotspots and everything there, but because of the heavy density of educational materials, video, all that, sometimes the bandwidth wasn't really what it was advertised. And so you'd have interrupted service.

Another leader from the district similarly noted, "So I think that's been our biggest struggle, is those kids that live way out in the country, we just can't get internet to them. There's no internet provider, and that's a regional problem." This disparity was particularly evident in Native communities. A district leader in rural Michigan explained:

There is still no running water on reservations. There's still no internet . . . from companies on reservations . . . So not only did we have no internet for more than half of our families, we're at a Wi-Fi shortage because everyone in the world needed Wi-Fi for their homes. And a lot of our families were driving to the school, parking their vehicles as close as they could to the school and trying to connect to the Wi-Fi through the school, or driving to local coffee shops that they know they have free Wi-Fi, or driving to the casino and parking their cars in front of the casinos so that the kids could use their internet from the Wi-Fi at the casino. It was mind-blowingly—so disturbing to think that this is still an issue.

In summary, although rural districts sought to improve technology access for families who opted for virtual instruction, these districts prioritized returning to in-person instruction as quickly as possible in light of these structural constraints. Doing so was also feasible given the alignment of views between district leaders and labor regarding in-person instruction, as described earlier. Overall, although both urban and rural districts faced challenges in ensuring access to technology and Wi-Fi, different structural challenges in rural areas might help explain why the rural districts in our study were more willing and readier to return to in-person instruction once it was allowed under state policies.

### **Summary of Patterns in Factors Shaping COVID Responses**

We asked: *What explains the patterns across cases or localities?* Our analysis indicated that:

- Key conditions related to the sociopolitical, economic, and geographic contexts—including the power of key actors and the structures of governance in each location—were especially influential in shaping organizational responses to COVID-19 in the first 16 months and drove these similarities and differences *across localities*.
- Similarities in state policies and state actors (especially governors) explained the similarities we saw in our sites in the initial (Spring 2020) response to COVID, but as we saw governors diverge in their approaches to reopening schools, we saw more variation in school practices across state contexts.

- Prior political and governance dynamics helped to explain differences across localities in the form or extent of within- and cross-sector collaboration.
- There were differences across localities based on their geographic contexts (e.g., urban, rural), which meant they faced different structural constraints or opportunities in modality and technology.

We also asked: *What explains the patterns across sectors within cases?* We found that:

- The political dynamics we examined also help explain why there were often similar responses by sector: In each of our cases, public and charter schools faced similar political circumstances and contextual influences.
- Schools across sectors relied heavily on public health guidance, which also drove similarities across sectors in our study.
- Charter and private schools in our sample followed the lead of traditional public schools, particularly in the earlier part of the pandemic.

## **Recap: Key Takeaways About Organizational Response**

In this report, we explored how school systems responded to the pandemic and the conditions shaping these organizational responses. With regard to organizational responses to crisis across sectors (charter, private, and traditional public schools), across five states, we found largely similar actions were taken in the schools and districts in our sample when it came to basic needs, such as providing meals and technology, assessments, addressing social-emotional learning, and training teachers and staff. However, we did see some variation in approaches to family communication, transportation, and modality, particularly in the reopening decisions in Fall 2020. Importantly, we found a great deal of centralization and collaboration across sectors during the crisis, particularly in the spring of 2020.

We also explored the drivers of these patterns. We asked: Why did we see so few differences across cases or by sector? What led schools to collaborate?

Participants described how similarities across sectors were driven by a common set of political and institutional influences (public health guidance, teachers' preferences or labor market dynamics, diminished competition, and prior governance structures) at each locality. Similarities across localities appeared to be driven initially by similar state policies and state actors, but we did see more divergence over time.

Given the different organizational conditions in charter, TPS, and private schools, including resources and autonomies, we expected to find significant variation in response to the COVID-19 pandemic. However, we found many similar patterns across the school sectors. This is understandable because charter, TPS, and private schools are influenced by similar conditions in the local environment and sets of actors. For example, seeking legitimacy from public schools and public health officials helps to explain some of the similarities in COVID response. Participants describe how the uncertainty, particularly in the early days of the pandemic, led



charter schools and private schools in our study to emulate the decisions of TPSs. In this moment of extreme uncertainty and lack of knowledge about the virus, schools of choice in our study generally defaulted to the decisions made by TPSs, partly because those schools often had deeper ties to public health agencies historically and partly to prevent teachers from leaving for TPS schools.

Similarly, both traditional public and charter school leaders were concerned about teacher retention, and teachers' voices played a role even in places without strong unions, resulting in largely similar responses across sectors, especially in the beginning of the pandemic. That said, districts with strong unions (such as Detroit) reopened for in-person learning more slowly and gave teachers more options (e.g., the choice of teaching in-person or remote), so district–labor relations did help to explain some of the variation we saw across localities. Over time, as the immediate uncertainty of the pandemic eased, we saw more variation by sector at some localities, with charter schools becoming more comfortable exercising their autonomies.

Variation in political dynamics (state policy, district-labor relations), as well as other conditions, such as prior governance structures, prior experiences with collaboration, and geography (rural and urban context) help explain some of the differences between our cases. Rural and urban areas, for example, faced different structural constraints or opportunities in modality and technology. And, although state policy contexts were largely similar at the start of the pandemic, state policies shifted over time in ways that aligned with the variation across our cases.

## **Conclusion**

As we learn as a society to live with crisis and disaster, we can learn from how schools anticipated and coped with the COVID-19 pandemic. In particular, our work suggests that although schools were largely not prepared for a health crisis at this scale, they developed crisis response plans with the recognition that, even in contexts that valued school choice and institutional autonomy, there was a need to prioritize coordination and centralization in response to emergency situations, even if that meant overriding or giving up some autonomies. Places like Louisiana had policies in place already to help centralize power in the case of emergencies because of hurricanes and climate events, whereas others formed new types of collaboration during the pandemic.

Although our study was conducted in the early stages of the pandemic, it reveals important insights about the nature of crisis and how school systems responded in the first year. Our findings suggest that a coordinated and similar response across sectors was more prevalent at the start of a crisis—particularly the centralization of basic needs (food, technology, and communication)—with more flexibility for systems to adapt and modify as they had more time to plan. For example, schools had the summer of 2020 to plan for how they would handle instruction in the fall of 2020, which enabled them to develop tailored plans that were still in line with overall state or district guidelines.

Although we found some strong examples of voluntary collaboration across sectors, we also identified places where these relationships were not as strong or where there was less communication across TPS districts and charter schools. Our work suggests a need to develop policies to ensure that school systems serving a common geographic area can coordinate for crisis response, if they choose. This is important across the board, but in particular for districts serving students living in poverty, students of color, and students from other marginalized backgrounds. Indeed, district leaders we spoke with viewed centralization of information as critical to their approaches to equity and diversity—to ensure that all critical information was available at a central location, regardless of which school or sector the families attended.

In this sense, our work also revisits questions about the relationship between decentralization and equity, and under what conditions and when (e.g., in moments of crisis) school autonomies should be expanded or curtailed to ensure equitable access to resources. Indeed, this is what has occurred in cities with longer histories of school choice, as they have come to realize the importance of centralization of things like enrollment systems, information on schools, and disciplinary policy in efforts to improve equity in and access to schools of choice (Bulkley et al., 2020).

The pandemic brought these inequities into further relief, as our participants noted, requiring coordination of even more services, such as provision of meals and technology delivery. The rural districts we studied typically began reopening sooner for in-person instruction than did the urban areas. This difference was partly because of the challenges of broadband access in rural areas, where virtual instruction was less feasible, but may also be due to political dynamics and to the different populations being served and their needs. Indeed, in rural places, the need for broadband access meant that even technological devices were not sufficient to provide remote learning options. The pandemic revealed the somewhat hidden or taken-for-granted role of schools in society as sources of childcare, meals and nutrition; access to technology; and mental health supports—essential supports that should be addressed by other social service institutions and policies in the broader society.

We also observe that state and federal policy plays an important role in moments of crisis. We argue that the dampening of competitive pressures, thanks to state “hold harmless” policies that kept budgets consistent and predictable, helped to create the conditions for collaboration across school districts and sectors. We can imagine that absent these policies, there could have been a different, more competitive rather than collaborative response to the pandemic that would have created more chaos and confusion for students and families seeking resources to meet basic needs. Additional resources and an influx of money helped schools to meet the dramatically increased needs for food, technology, distribution, and protective equipment, although there were greater challenges, as noted, in rural areas, where the infrastructure of broadband needed far more investment than school districts could provide.

Overall, these findings align with other studies in several ways. First, as in other research, we found racial differences in reopening demand, driven by geography. As noted earlier, the urban areas in our study with large Black populations described having greater demand for virtual

rather than in-person instruction, similar to patterns we see across the United States (e.g., Anderson, 2021). These dynamics also shaped district and school responses, as families of color in urban contexts expressed less demand in-person services, because of health and other concerns (Haderlein et al., 2021), and leaders surveyed families to inform their schools' modality decisions.

Second, our findings also align with other studies on schools of choice, which reveal isomorphic tendencies—the mimicking of practices and structures across different types of organizations within the same field or environment—and limited innovation across the board (Lubienski, 2003; Marsh et al., 2020; Preston et al., 2012), although there are pockets of innovation and a great deal of variation within, for example, the charter school sector. Similarly, the uncertainty, particularly in the early days of the pandemic, led charter schools and private schools in our study to rely on the decisions of TPSs and to emulate them. In this moment of extreme uncertainty and lack of knowledge about the virus, schools of choice defaulted to the decisions of TPSs, which often had deeper ties to public health agencies historically.

Our work has several limitations. Our sample is limited to a few states, districts, and schools. We only had two private schools in our sample, for example. We focused on urban and rural districts, but further research could explore the variation in COVID response in suburban districts, particularly across suburbs that vary in terms of demographics, political affiliation, and state context. Our framework drew broadly on organizational theory, but we paid less attention to the psychological or cognitive dimensions of crisis response. Future research could explore how actors in organizations made sense of the crises, and how that shaped their responses (Weick, 1988). In addition, future work could explore the contextual factors that drive cross-sector or cross-school partnerships in moments of crisis, i.e., civic capacity or social capital, and further explore the role of intermediary and community-based organizations in crisis response.

Given that our work was conducted at the very early stages of the pandemic, which continues to affect instruction, students' social and emotional needs, and staffing, there is a need for more research to explore how schools have continued to cope with the crisis and, in particular, how they might be learning from their early coping responses and adapting or shifting organizational structures, systems, or strategies in response to the pandemic in ways that are long lasting and equity oriented. In fact, many questions remain: Will systems continue with virtual and/or hybrid learning programs and options for families? Will alternative assessment practices adopted in the early pandemic be sustained in any form? Will there be long-term changes in social-emotional supports for students, communication strategies, and supports for teachers and staff? Will competitive pressures ramp up in ways that alter within- and across-sector relationships? Will the relationship between charter and traditional public schools be permanently altered, or return to the status quo? Will these systems be better prepared for the next wave of the pandemic, new pandemics, or future natural disasters? These questions are ripe for ongoing research.

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**Table 1**  
*State Characteristics*

State	Colorado <sup>1</sup>	Louisiana <sup>2</sup>	Michigan <sup>3</sup>	Oregon <sup>4</sup>
<b>Total Public School Enrollment</b>	911,536 students	717,109 students	1,485,144 students	580,684 students
<b>Charter Enrollment</b>	120,739 students (13%)	78,749 students (11%)	146,736 students (10%)	33,677 students (6%)
<b>Inter-District Enrollment</b>	49,800 students (5%)	Not Available	187,551 (12%)	Not Available
<b>Private School Choice Enrollment</b>	No Private School Choice	86,122 students	No Private School Choice	No Private School Choice
<b>Student Demographics</b>				
<b>Black-All</b>	4.5%	43.2%	17.9%	2.0%
<b>Black-Charter</b>	6.1%	70.8%	51.6%	1.6%
<b>Latinx-All</b>	33.6%	7.6%	7.3%	23.0%
<b>Latinx-Charter</b>	35.9%	5.8%	8.8%	12.4%
<b>White-All</b>	53.4%	44.2%	67.4%	62.0%
<b>White-Charter</b>	50.5%	20.0%	32.4%	75.8%
<b>Low Income-All</b>	40.7%	69.8%	46.1%	49.0%
<b>Low Income-Charter</b>	43.7%	78.0%	70.9%	23.3%
<b>Students with Disabilities-All</b>	11.2%	12.1%	12.4%	13.6%
<b>Students with Disabilities-Charter</b>	6.3%	11.0%	9.5%	10.5%
<b>English Learners-All</b>	13.8%	3.7%	6.0%	9.4%
<b>English Learners-Charter</b>	21.1%	6.0%	9.5%	2.4%
<b>State Labor Laws</b>	Right to work state	Right to work state	Right to work state	Collective bargaining
<b>Governor</b>	Democrat	Democrat	Democrat	Democrat
<b>State Legislature</b>	Democrat	Republican	Republican	Democrat

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**Table 2**  
*District Characteristics*

Districts	Denver <sup>1</sup>	New Orleans <sup>2</sup>	Detroit <sup>3</sup>	Rural MI District 1 (Teal) <sup>4</sup>	Rural MI District 2 (Jade) <sup>5</sup>	Portland <sup>6</sup>	Rural OR District (Sage) <sup>7</sup>	Washington, DC <sup>8</sup>
<b>Total Public School Enrollment</b>	90,250 students	46,602 students	47,881 students	586 students	439 students	49,478 students	4,697 students	94,412 students
<b>Charter Enrollment</b>	18,463 students (20%)	43,136 students (99%)	48,428 students <sup>9</sup>	<100	<100	1,385 students (3%)	Not Available	43,518 students (46%)
<b>Private School Choice Enrollment</b>	Not Applicable	Approximately 11,650 students	Not Applicable	Not Applicable	Not Applicable	Not Applicable	Not Applicable	Approximately 1,600 students
<b>Student Demographics</b>								
<b>Black-All</b>	13.7%	80.0%	82.0%	NA	NA	8.7%	0.7%	58.0%
<b>Black-Charter</b>	20.0%	51.8%				9.5%		76.0%
<b>Latinx-All</b>	52.1%	9.1%	13.6%	15.3%	19.4%	16.5%	10.8%	21.0%
<b>Latinx-Charter</b>	65.0%	7.8%				9.0%		11.9%
<b>White-All</b>	25.3%	7.5%	2.4%	63.4%	77.5%	56.5%	81.0%	16.0%
<b>White-Charter</b>	15.0%	35.8%				68.2%		8.0%
<b>Low Income-All</b>	59.2%	84.0%	81.5%	60.1%	39.50%	38.1%	41.0%	73.0%
<b>Low Income-Charter</b>	72.0%	73.8%				13.0%		76.8%
<b>Students with</b>	12.1%	5.2%	14.0%	15.5%	7.1%	15.0%	13.0%	15.0%

Districts	Denver <sup>1</sup>	New Orleans <sup>2</sup>	Detroit <sup>3</sup>	Rural MI District 1 (Teal) <sup>4</sup>	Rural MI District 2 (Jade) <sup>5</sup>	Portland <sup>6</sup>	Rural OR District (Sage) <sup>7</sup>	Washington, DC <sup>8</sup>
Disabilities-All								
Students with Disabilities-Charter	10.0%	1.0%				12.0%		13.5%
English Learners-All	36.3%	6.6%	12.6%			7.8%	<5%	16.0%
English Learners-Charter	50.0%	2.2%				1.9%		8.5%
Teachers' Union <sup>10</sup>	DCTA, DSLA Recent strike Feb. 2019 Historically low influence, but growing	UTNO No recent strikes Very low influence	DFT Threat to strike Aug. 2020 Moderate level of influence, but very politically active	MEA, UniServ No recent strikes Low influence	MEA, UniServ No recent strikes Low influence No recent strikes Low influence	PAT No recent strikes Very high influence	OEA, Eastern Oregon UniServ No recent strikes Moderate influence	WTU Voted gaainst strike Feb. 2021 High influence
Mayor	Democrat	Democrat	Democrat	Unincorporated	Nonpartisan	Democrat	Republican	Democrat
Governance Structure	Portfolio Management	Managed market	Fragmented governance	Traditional district governance	Traditional district governance	Traditional district governance	Traditional district governance	Parallel sector governance

<sup>1</sup> Facts and figures: DPS by the numbers. (2019). <https://www.dpsk12.org/about/facts-figures/#students>.

<sup>2</sup> Louisiana Department of Education. (n.d.). Data center. <https://www.louisianabelieves.com/resources/library/data-center>; Cowen Institute. (2019). *SPENO: 2019–2020*. <https://cowendata.org/reports/the-state-of-public-education-in--new-orleans-2019/enrollment>.

<sup>3</sup> Detroit Public Schools Community District. (n.d.). About DPSCD: Schools & student facts. <https://www.detroitk12.org/Page/15183>.

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<sup>5</sup> National Center for Education Statistics. (n.d.). District directory information. [https://nces.ed.gov/ccd/districtsearch/district\\_detail.asp?Search=2&ID2=2621390&DistrictID=2621390&details=1](https://nces.ed.gov/ccd/districtsearch/district_detail.asp?Search=2&ID2=2621390&DistrictID=2621390&details=1) (2018-19)

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<sup>8</sup> DC.gov. (n.d.). Office of the State Superintendent of Education. <https://osse.dc.gov/>; <https://data.publiccharters.org/state/district-of-columbia/> DC 2019 data; <https://dcps.dc.gov/page/dcps-glance-enrollment>; National Alliance for Public Schools Charter. (n.d.). District of Columbia. <https://data.publiccharters.org/state/district-of-columbia/>; The Century Foundation. (n.d.). How well do states support integration in charter schools?: District of Columbia. <https://charterdiversity.org/statedata/#District%20of%20Columbia>

<sup>9</sup> Wayne County residents enrolled in charters.

<sup>10</sup> Denver Classroom Teachers Association (DCTA) and Denver School Leaders Association (DSL); United Teachers of New Orleans (UTNO); Detroit Federation of Teachers (DFT); Michigan Education Association (MEA) and UniServ; Portland Association of Teachers (PAT); Oregon Education Association and Eastern Oregon UniServ; and Washington Teachers' Union (WTU).

**Table 3***Interviews by Type*

<b>Respondent Type</b>	<b>Number of Interviews (<i>n</i> = 68)</b>
System Leaders (CMO)/Superintendent	10
Central Office Administrators (District/CMO) <sup>a</sup>	22
School Leaders/Principals	18
School Board Members	2
Teachers Union Leaders	5
Community Based Organizations/Advocacy Leaders <sup>b</sup>	9
Public Health Officials	2

<sup>a</sup> Central office administrators included interviewees overseeing academics, operations, enrollment, research & accountability, charter authorization, communications, support & improvement, and equity & diversity, and student health.

<sup>b</sup> Community/advocacy leaders included those from organizations actively supporting school choice options and broader community-based organizations serving families and children.

**Table 4**  
*Key Decision Areas*

Decision Area	Description	Examples
<b><i>Learning and Assessment</i></b>		
Assessments and Accountability	Interim testing, learning loss, state standardized testing, grading	<ul style="list-style-type: none"> <li>• No-harm grading policies</li> <li>• Suspending standardized testing</li> </ul>
Academics and Learning	Curriculum, instruction, grading, learning platforms, pedagogy, or sorting students (e.g., mixed grade levels)	<ul style="list-style-type: none"> <li>• Decision to adopt a Learning Management System</li> <li>• Requirements to offer a certain number of instructional hours</li> </ul>
Closing, Reopening, and Modality	School closures, reopening methods and timelines, decisions about online/hybrid/in-person learning	<ul style="list-style-type: none"> <li>• Decision to close due to COVID case rates</li> <li>• Moving to a hybrid modality due to staffing concerns</li> </ul>
<b><i>Supporting Students and Families</i></b>		
Social-Emotional and Mental Health Supports	SEL curriculum, additional mental health services, counseling	<ul style="list-style-type: none"> <li>• Expansion of SEL curriculum</li> <li>• Extending mental health services to parents and families</li> </ul>
Information Provided to Families	Communication to families	<ul style="list-style-type: none"> <li>• Communicating COVID case rates</li> <li>• Surveys about modality</li> </ul>
Family Supports	Nonacademic assistance offered to families and communities	<ul style="list-style-type: none"> <li>• Providing meals</li> <li>• Help with housing</li> <li>• Health care assistance and school clinics</li> </ul>
Technology and Access	Hotspots, laptops and other devices, internet access, usability	<ul style="list-style-type: none"> <li>• Providing mobile hotspots</li> <li>• Expanding help desk services for parents</li> </ul>
<b><i>School Operations and Human Resources</i></b>		
Supports for Teachers and Staff	Staff wellbeing, professional development and	<ul style="list-style-type: none"> <li>• Vaccination prioritization</li> </ul>

Decision Area	Description	Examples
	learning, vaccinations	
Transportation	Busing, public transit, and parent driving demands	<ul style="list-style-type: none"> <li>• Reorientation of bus routes to serve special populations</li> </ul>
Health, Safety, and In-Person Instruction	Personal protective equipment (PPE) policies and distribution, social distancing, surveillance and monitoring, COVID case rates	<ul style="list-style-type: none"> <li>• Working with public health authorities</li> <li>• Masking policies</li> </ul>
Funding	Issues related to allocating funds and resources to accommodate changing student and staff needs	<ul style="list-style-type: none"> <li>• Reallocating funding for purchasing technology</li> <li>• Using CARES Act funding to hire additional staff</li> </ul>

**Table 5***Similarities and Differences in Key Decision-Making Domains Across Localities*

Locale	School Type	Basic Needs Distribution		Family Communication	Modality	
		Meals	Technology		Spring 2020	Fall 2020
Washington, D.C.	Charter**	Provided meals, on-campus, meal pick-up hubs, and delivery to families	Chromebooks to each student Some offer hotspots	Two-way communication (parent groups)	United front between sectors on closing	Charters moved quicker than TPSs to reopen
	Traditional Public School	Provided meals, meal pickup hubs, delivery to families	Hotspots to eligible families (using SNAP)	One-way communication (some)	United front between sectors on closings	Charters moved quicker than TPSs to reopen
Denver	Charter	Provided meals, on-campus and meal pick-up hubs (coordinated with TPS)	Chromebooks to each student Some offer learning hubs on campus	One-way communication (frequent) Two-way communication (via surveys)	United front between sectors on closings	Both charter and TPSs offered in-person learning as soon as possible
	Traditional Public School	Provided meals, on-campus and meal pick-up hubs (coordinated with charters)	Chromebooks to each student Some offer learning hubs on campus	One-way communication (frequent) Two-way communication (via surveys, town halls, etc.)	United front between sectors on closings	Both charter and TPSs offered in-person learning as soon as possible
Detroit	Charter	Provided meals*	Devices provided, but most charters already 1:1	Two-way communication (sporadic surveys, town halls) One-way communication (major decisions, closures)	United front between sectors on closings	Charters moved quicker than TPSs to reopen, but then pivoted to hybrid
	Traditional Public School	Provided meals, shared with charters*	Tablets, hotspots provided (with business support),	One-way communication (information, home visits)	United front between sectors on closings	Charters moved quicker than TPSs to reopen

Locale	School Type	Basic Needs Distribution		Family Communication	Modality	
		Meals	Technology		Spring 2020	Fall 2020
New Orleans	Charter	Provided meals, on-campus (at 42 schools), by collaborating with district and community leaders	Chromebooks and hotspots provided (using emergency funds), but deep digital divides noted	One-way communication Two-way communication (some leaders make themselves available to families)	United front between all schools & CMOs on closings	Charter schools reopen (can prioritize different students for in-person instruction)
	Voucher	Provided some meals, on-campus, not regularly	Unable to provide devices to everyone (due to lack of resources)	Two-way communication (surveys)	United front between all schools, CMOs, and private schools on 2020 closings	Reopened in person, with options for virtual based on family need
Sage*, Oregon	Traditional Public School	Provided meals, delivered to families	Devices provided, but internet access issues in rural parts of district (rely on libraries, churches, businesses for internet)	One-way communication (timelines, safety information)	Closed due to mandates, but stakeholders mostly desire reopening as soon as possible	Provide in-person instruction, alongside partnership with a virtual school
Portland	Charter	Provided meals*	Devices and hotspots provided to all families (via partnership with TPS district)		United front between all schools & small number of charters on closings	Schools reopen with charters having more autonomy despite strict guidelines from state
	Traditional Public School	Provided meals, on campus	Devices and hotspots to all families (in partnership with charters); Formed external	Two-way communication (surveys, focus groups, community-based orgs)	United front between all schools & small number of charters on closings	Schools reopen with TPS having less autonomy due to strict guidelines from state



Locale	School Type	Basic Needs Distribution		Family Communication	Modality	
		Meals	Technology		Spring 2020	Fall 2020
			partnerships to provide internet access			
Teal*/Jade,* Michigan	Charter	Provided meals*	Chromebooks provided to all families	Two-way communication (surveys) One-way communication (major decisions, closures)	United front on closings	Schools reopen (and stay open)
	Traditional Public School	Provided meals, delivered to families	Devices and hotspots distributed based on need and usage (disabled if students do not log in). Connectivity challenges in remote areas on reservation, deep digital divide	Two-way communication (surveys, family liaisons, connect with tribal parents)	United front on closings	Schools reopen, with virtual school option for tribal community especially

\*In some cases, we did not have further details about the nature or type of food/meal delivery.

Note: Our study included participants at 18 schools across the localities. Therefore, this is not representative of *all* TPS or charter schools, but just of the cases included in our study, and based on the information provided to us by the people we interviewed at each place. \*Asterisk indicates the district name is a pseudonym. We masked rural school districts and named urban school districts, based on our individual research agreements at each locality. \*\*When we refer to “charter” or “TPS,” this only refers to what we found in the limited number of schools at our localities, not to the entire sector.

**Table 6**  
*School Reopening Timelines*

Case	Early response Spring/Summer 2020	Preparation for 2020–21 school year Summer/Fall 2020	Start of the 2020–21 school year Fall 2020	Changes over the 2020–21 school year Fall 2020–Summer 2021
Denver	Temporary school closures in March were announced, followed by building closure and remote learning through the end of the school year per Governor’s orders.	State government released guidance for reopening in July. DPS plans reopening and negotiates with teachers’ union. DPS and charters decided to make school closing decisions in response to county health data. DPS also coordinated reopening standards with surrounding districts.	At the beginning of the school year, the overwhelming majority of districts in the state were virtual or hybrid. Families had until mid or late September to decide if children would remain fully virtual. By late October, Denver completed a phased return for all elementary students being back in-person.	In November, case rates spiked across the state. DPS schools switched to virtual; some charters remained hybrid. DPS and (many) charter schools start to phase in-person in January, with most students in-person by Spring 2021.
Detroit	Governor ordered schools closed temporarily in March, followed by building closures for the remainder of the year starting 3/16, initially for a couple weeks but eventually for the remainder of the school year.	Governor required a “Return to School” plan from all districts and establishes general public health guidance based on case-rates. After union negotiations, DPSCD agreed to allow teachers to choose in-person or remote teaching and set a 5% COVID-19 case-positivity threshold for closing schools.	The large majority of DPSCD teachers chose to teach remotely; DPSCD established “learning centers” in schools, where non-instructional staff supervise and assist students in the building as they participate in remote learning. Charter schools mostly offered remote or hybrid options.	In December, rising COVID-19 cases led DPSCD and most charters to return to remote-only. Most schools returned to offering an in-person option by the spring.
New Orleans	Governor announced temporary school closures in March, and again in April; announced closures for the rest of the school year in mid-April.	In July, the district released a “Roadmap to Reopening” with guidance from local and national public health officials. District established a unified school calendar for the first time. Schools have autonomy. A city-wide group	Charter schools began the school year in distance learning; private schools mostly returned to in-person learning. Reopening was further delayed due to hurricanes. Phased in-person reopening (elementary, then middle, then high	In January, schools switched to virtual learning for 3 weeks, following an increase in COVID-19 cases. Hybrid and in-person incrementally re-offered to elementary and middle school students; hybrid or remote (no full

		of public and private leaders collaborated to support reopening.	school) took place throughout September and early October.	in-person) offered to high school students through May.
Portland	Governor announced temporary school closures in March, followed by closures for the remainder of the year in April.	The state department of education released “Ready Schools, Safe Learners” guidance on reopening and announced health metrics to guide reopening decisions. PPS developed in-person plans but superintendent decided that schools would start the year closed.	PPS started the year fully-remote as did the few charter schools in the city. The superintendent viewed union strength and teacher concerns as an obstacle to reopening, appealing to the governor to issue an executive order for school reopening.	In March, the governor ordered schools to provide in-person instruction for K–5. For reopening, the union negotiated that teachers would not be required to conduct both in-person and virtual learning, and secured some additional health and safety measures. Families could choose online or hybrid.
Washington, D.C.	Schools closed temporarily; then school closures were extended for the remainder of the school year. The mayor’s office arranged discussion between DCPS and charter district leaders and local public health officials.	Mayor’s office, superintendent’s office, and Department of Health officials developed a plan for remote learning for the first quarter and probably the second quarter. Charters were required to submit plans to the superintendent’s office. Most charters planned for remote start. Negotiations between DCPD and union until Dec. 2020.	DCPS started with remote learning, but offered “CARE classrooms” to accommodate students with special educational needs and children of essential workers. Charters similarly start remote; some offered small in-person options similar to “CARE classrooms.”	DCPS schools reopened in quarter three. Parents could choose in-person or virtual. DCPS conducted safety and health walkthrough audits to boost family confidence in returning in-person. Many charter schools offered in-person options in the second half of the school year; many also remain remote-only.
Sage, Oregon	Governor announced temporary school closures in March, followed by closures for the remainder of the year in April.	The state department of education released “Ready Schools, Safe Learners” guidance on reopening and announced health metrics to guide reopening decisions. Were prepared to start in person, but then were required to start the year remotely by governor.	Elementary students came back fully in person in mid-October, and secondary was hybrid by January. Strong support for return to in-person learning, with state requirements being the only barrier.	Continued to follow state protocols, and remained in-person (quarantining as needed), reported no within-school spread. Teachers teaching hybrid/remote mandated to teach from their classrooms.
Teal and Jade, Michigan	Governor ordered schools closed temporarily in March, followed by building closures for the remainder	Governor required a “Return to School” plan from all districts and establishes general public health	Both districts reopened in September with hybrid models. The hybrid model gave families the	Remained open throughout the year. Did not have to close due to positive COVID cases. Continued to

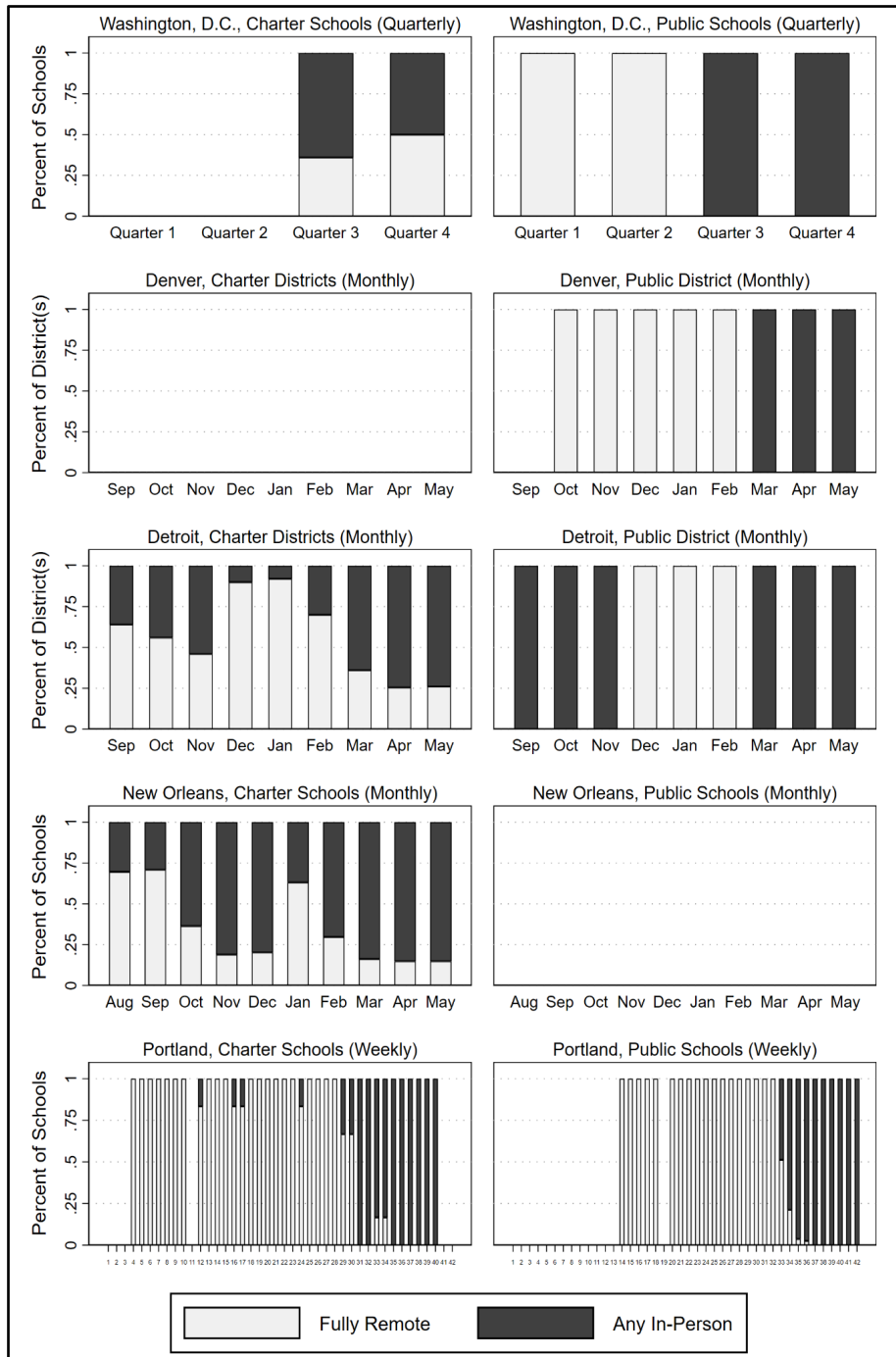
of the year starting 3/16, initially for a couple weeks but eventually for the remainder of the school year.

guidance based on case-rates. They planned to reopen for in-person learning in September and did so (hybrid). Also had a virtual school (prior to pandemic). Planned for PPE, planning, checklists to ensure return to in-person.

option to send students to school M, T, Th and F. Wednesdays for students labeled “at risk” or Title I or SPED for an intervention. Hybrid also gave them flexibility for quarantines.

offer an at-home learning program for a few families.

**Figure 2**  
*School Modalities in Cities over Time, 2020-21 School Year*



Modality data come from the COVID-19 School Data Hub (CSDH; [covid19schooldatahub.com](https://covid19schooldatahub.com)). “Any in-person” indicates hybrid or in-person modalities offered. Blank areas indicate missing data. Some data was available at the school level and some was available at the district level. CSDH had no data for charter schools in Denver or Washington, DC. Washington, DC charter school data for quarters three and four are imputed from public records on charter school modality from the DC Public Charter School Board ([dcpcs.org/school-reopening-and-recovery](https://dcpcs.org/school-reopening-and-recovery)). Public school data are left missing for New Orleans because only two non-charter schools had available data in the CSDH. We were unable to obtain reliable data from the rural areas.