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Commercialism in Education Research Unit

VIRTUALLY EVERYWHERE: MARKETING TO CHILDREN IN AMERICA'S SCHOOLS

THE SEVENTH ANNUAL REPORT ON SCHOOLHOUSE COMMERCIALISM TRENDS: 2003-2004

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Executive Summary

Schools have become integral to the marketing plans of a vast array of corporations as commercial interests—through advertising, sponsorship of curriculum and programs, marketing of consumer products, for-profit privatization, and fundraising tied to commercial entities—continue to influence public education. The trend persists despite growing criticism of—and to some degree, attempts to resist—practices that create tighter bonds between public schools and private, for-profit corporations. It is driven in large part by continued financial struggles of public school systems to meet the demands of educating children in the face of tighter resources.

For the period from July 1, 2003, through June 30, 2004, media references to schoolhouse commercialism rose in five of eight categories monitored by the Education Policy Studies Laboratory's Commercialism in Education Research Unit (CERU) at Arizona State University. CERU uses media references to measure schoolhouse commercialism by conducting searches on relevant terms in the media databases Education Index, Google News, and the news, marketing, and business databases of Lexis-Nexis, and counting the number of citations each search produces. The categories are: <u>Sponsorship of Programs and Activities</u>; <u>Exclusive Agreements</u>; <u>Incentive Programs</u>;

Appropriation of Space; Sponsored Educational Materials; Electronic Marketing; Privatization; and Fundraising.

The two leading trends uncovered in the 2003-2004 study were growing criticism of marketing practices perceived to contribute to poor health in children, and the rise of virtual charter schools.

Individual school districts, cities, and states passed regulations and laws limiting or banning the sale of junk food, soft drinks, or both on school grounds, citing the danger of increased childhood obesity. At the same time, food industry lobbyists and in some cases school district officials—fearful of lost revenues—resisted such controls.

Separately, as part of a larger trend that saw the maturing of the for-profit public education industry, represented by Education Management Organizations managing public schools or public charter schools under contract, virtual charter schools grew substantially, often enabled by state legislation. The leading firm involved in the industry is K12 Inc., founded and headed by William Bennett, a former US Education Secretary.

The 2003-2004 study found an overall increase in schoolhouse commercialism references of nine percent, to 5,742 references in 2003-2004, compared with 5264 references in 2002-2003. By category:

- References to Sponsorship of School Programs and Activities rose nine percent in the 2003-2004 survey, with 1,317 references recorded, making it the largest category of schoolhouse commercialism activities to be reported for 2003-2004. By comparison, the category recorded 1,206 during 2002-2003. Since 1990, references have risen by 146 percent.

- References to Exclusive Agreements more than doubled compared with 2002-2003, with 560 references recorded, compared with 252, a 122 percent year-to-year increase. Since 1990, references to exclusive agreements have risen by 858 percent.
- References to Incentive Programs, which provide some sort of reward in the form of a commercial product or service in return for students who achieve an ostensibly academic goal, such as perfect attendance or increased reading, were essentially flat, dropping by about 0.8 percent to 351 in 2003-2004 from 354 references in 2002-2003.
- References to Appropriation of Space—the use of school property to promote individual corporations through mechanisms such as naming rights or general advertising—rose by 87 percent, to 611 references in 2003-2004 from 326 in 2002-2003. Since 1990, such references have risen 394 percent.
- References to Sponsored Educational Materials—curriculum materials produced largely by an outside corporate entity for use in public schools—fell seven percent, to 287 in 2003-2004 from 310 in 2002-2003. References since 1990 have risen 1,038 percent, however.
- References to Electronic Marketing using broadcast, Internet, or related media in schools in order to target students as consumers rose 24 percent, to 341 references in 2003-2004 from 276 in 2002-2003.
- References to Privatization—the private management of public schools, of public charter schools—dipped 30 percent in 2003-2004, to 1,100, from 1,570 in 2002-2003.

- References to Fundraising increased 21 percent in 2003-2004 over 2002-2003, to 1,175 from 970.

The study also found widespread references to schoolhouse commercialism issues in the international press, but extremely limited coverage of the topic in the US education press, with only one percent of all references being recorded in education publications.

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Introduction

In the heartland city of Indianapolis, students are enrolled in what would seem to be an unlikely school: The Lafayette Square Mall. There, amid the bustle of shoppers and the beeping of cash registers, students attend classes, work at part-time jobs for credit, walk the mall to fulfill a mandatory gym requirement, and get their meals at the food court. Since 1998, America's largest mall developer, the Simon Property Group, has been opening alternative public schools in malls through its non-profit Simon Youth Foundation in partnership with local public school systems. To date, Simon has 19 such "Education Resource Centers" (ERCs) in 11 states. The center at Lafayette Square, with a 200-student capacity, is the newest and largest.[1]

Supporters of the Simon school-in-a-mall concept, starting with corporate representatives, offer a benign, even laudatory interpretation of their efforts. The ERCs enroll struggling students at risk of dropping out; they maintain a 15-to-1 student-to-teacher ratio; they require students to sign behavioral contracts and learn job skills and turn some 90 percent of them from likely dropouts to high school graduates. "To the students, despite the junk food ads and beeping cash registers a few steps away, the mall ERC offers a calm and professional atmosphere—especially compared with the large urban high schools they left behind,"[2] observed journalist Chris Berdik, writing about the phenomenon in *The Boston Globe*. But psychologist Susan Linn points out the inherent problem in a mall-based school. "Schools are supposed to be good for kids," says Linn, author of *Consuming Kids: The Hostile Takeover of Childhood*. She adds: "…if a school embraces a commercial enterprise or commercial values, the school is sanctioning them…A mall is full of businesses that want to sell things, and sell things to kids."[3]

The Lafayette Square Mall school is the latest, and perhaps most extreme, example of a larger trend that has continued virtually unabated: the crumbling wall between public education and the commercial sphere. As Simon Properties moves the schoolhouse into the shopping center, marketers, despite rising criticism, continue to burrow into public education. The result is changing the character of public schools to make them less like educational institutions and more like the shopping malls where so many students spend their free time. Rather than an anomaly, Lafayette Square may be a vanguard.

The spread of schoolhouse commercialism is part of a much broader trend, the encroachment of commercial interests into every element of modern culture.[4] What sets it apart is the way it subjects children to its influence. And children are increasingly the prime target audience for corporations seeking to sell. As a sign of how important the youth market is to advertisers, consider that organizations such as Alloy Inc., and its subsidiary, 360 Youth, exist solely to market to teens. Alloy is a media, direct marketing and marketing services company targeting the audience ranging in age from 10 to 24. Alloy's media and marketing arm, 360 Youth, targets teens and college-age people with in-school billboards, high school and college newspapers, websites, magazines, and catalogues.[5] Meanwhile, cable television viewing by children has reached record levels—cable accounts for 68 percent of children's daily TV watching—and advertisers are flocking to the shows they watch to sell them products.[6]

Schools have become integral to the marketing plans of a vast array of corporations. "What we have now is an ingrained idea that public schools exist for private profit,"[7] observed Georgia State University education professor Deron Boyles.

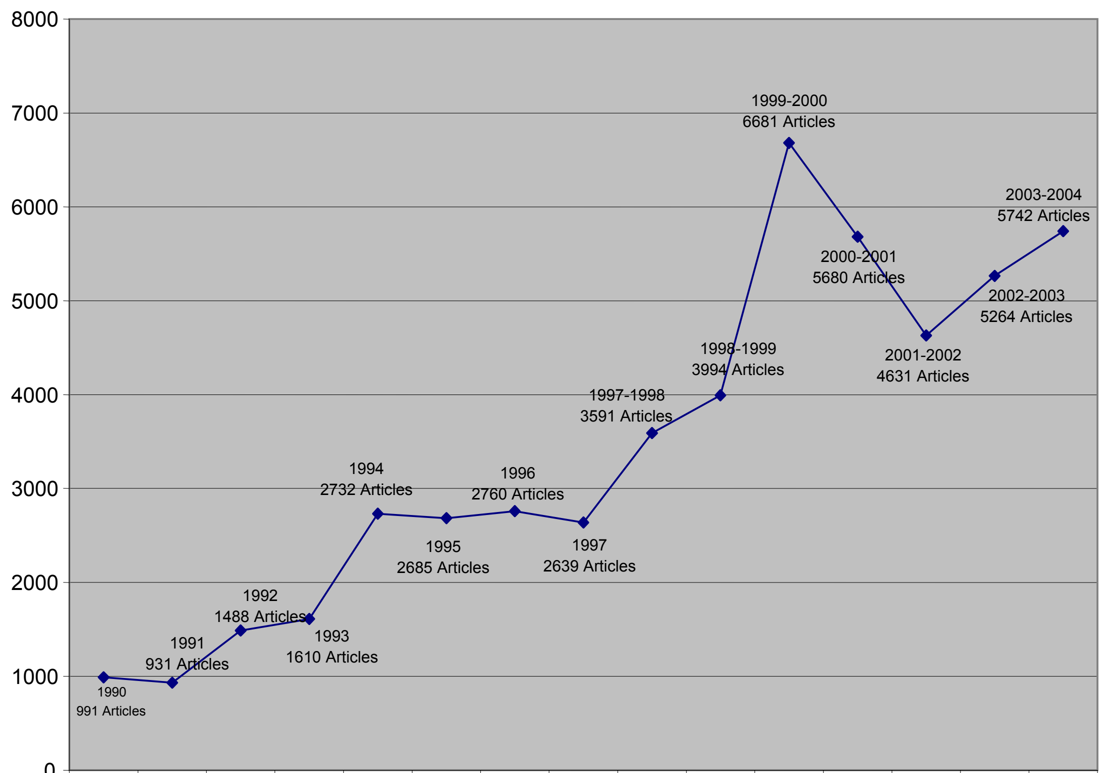
Schoolhouse commercialism entails selling *to* schools, selling *in* schools, and finally, the selling *of* schools and of education as a marketable commodity. Although selling to schools is nearly as old as common schools themselves, even in that traditional arena, new developments have been surfacing. The passage of the No Child Left Behind Act,[8] imposing test-performance and other mandates on schools as a condition of receiving federal aid, has given suppliers new marketing opportunities. Microsoft, Excelsior Software, Blackboard Inc., Plato Learning, and other suppliers of products that schools use have, in various ways, promoted their wares as helping schools meet the demands of NCLB.[9] In an address to securities analysts in January 2004, Raymond Marchuk, a senior executive from the publisher Scholastic Inc., noted that his company expected to see its educational publishing segment grow 10 percent over its original target thanks in part to the pressure on schools to raise reading scores under NCLB.[10]

(Poking fun at the trend, a desk maker is reported to have put up a sign at a school board convention touting its furniture as "No Child Left Behind-compliant." [11])

Commercialism References Rise

The Commercialism in Education Research Unit (CERU) of the Education Policy Studies Laboratory at Arizona State University has been monitoring media references to schoolhouse commercialism since 1990. For the July 1, 2003-June 30, 2004 period, media references rose in five of eight categories that CERU monitors (See Figure 1 for a graphic indication of the rise in citations of commercializing activities). References held roughly even in one category and dropped in two others, with the steepest decline in references to Privatization of Public Schools. Based on other evidence, it seems unlikely that privatization as a practice has declined; the discussion of this category later in this report offers speculation on several possible reasons for the decline in references.

Figure 1: Combined Total Citations All Categories All Presses, By Year



	1990	1991	1992	1993	1994	1995	1996	1997	97-98	98-99	99-00	00-01	01-02	02-03	03-04
All Presses and Categories	991	931	1488	1610	2732	2685	2760	2639	3591	3994	6681	5680	4631	5264	5742

CERU monitors commercial activities in schools by counting media references to those activities, as recorded by Lexis-Nexis, Education Index, and Google News. This methodology provides a useful proxy for measuring schoolhouse commercial activity.

<u>Schools Scramble for Cash</u>

Schools are also seeking corporate involvement, in effect offering to barter access to their students in exchange for corporation funds. Funding shortages continue to strain school systems. “In California’s Scotts Valley, the local school district faces the prospect of slashing $900,000 from a $15 million budget next year,” the Associated Press reported in January 2004.[12] The district’s solution was to hire a marketing firm to sell naming rights for a new theater or swim center. As a National School Boards Association spokesperson, Dan Fuller, told the AP: “First and foremost, our schools are struggling. Many districts are engaged in this [commercialism] because of the dire straits they’re in. This presents a real opportunity and a trend that will continue and possibly grow.”[13]

In West Bend, Wisconsin, the local school board, faced with the need to cut $1.3 million from its budget, eliminated elementary school orchestra, cut 13 full time teacher slots, and reduced class time for art and for physical education. Small wonder, then, that the school district considered corporate sponsorships for high school athletics.[14] In Massachusetts, a newly hired superintendent urged Nashoba Regional High School to look into corporate sponsorships for school teams after the school was forced to hike sports participation fees by 15 percent, to $328 per student, for the 2003-2004 school year. The fee was hiked because fewer students had signed up for sports—perhaps because of the original fee.[15] Indeed, in at least 29 states, some schools require students to pay in order to participate in athletics.[16]

Parents in Huntington Beach, California, turned to fund-raising efforts in hopes of preserving smaller class sizes of 20 students to one teacher, threatened by state budget cuts.[17] In Washington State, school officials indicated rising interest in corporate sponsorship and naming rights in the face of tight budgets—even as they acknowledged such measures only slightly offset their costs.[18] Even as Washington State educators floated such ideas, however, they acknowledged that they could backfire if the practices signaled to legislators that it was possible to reduce aid to schools further.[19]

Faced with a $600,000 budget gap, the Belmont-Redwood Shores Elementary School District in California offered to let businesses advertise themselves on a school walkway ($1,000 a brick), the library ($50,000), the science program ($100,000), or the entire district (price negotiable). While a member of the fundraising committee assigned to implement the proposal called it a "win-win" idea for the district and its business partners, the superintendent of a neighboring district called the proposal "pretty troubling to me…It would seem to me like we were advertising."[20] Elsewhere, schools are joining the rest of the public in raising money by selling assets on eBay.[21] In Seekonk, Massachusetts, the local school board laid off teachers and assessed fees to riders of school buses to meet a $16.5 million budget. Criticism of the bus fees, however, led the school board to scale them back and, instead, permit advertising on school buses, a growing trend.[22] School districts from Santee, California, to Beverly, Massachusetts, face the possibility of closing schools to save money.[23]

In some school districts, residents approach the issue systematically, establishing permanent foundations to raise and disburse funds to supplement school tax revenue. Corporate sponsors often contribute, and the amount of recognition they receive varies. "Although they provide a mere fraction of the cost of running a school district, the foundations have become vital," the *New York Times* reported.[24] It is likely that school foundations are more often established in affluent communities. If so, such foundations would increase disparities in funding between districts serving affluent and those serving poor children.

There have been attempts by legislators to rein in corporate involvement in schools, focusing primarily on restricting sugary soft drinks and junk foods. However, in their campaigns, candidates for local school boards frequently tout seeking more corporate sponsorships.[25] Indeed, some involved in advancing such sponsorship portray it as not merely inevitable, but as advantageous: "This is a marketing field that's about ready to blow up like college blew up 20 years ago," says Judith Thomas, director of marketing for the National Federation of State High School Associations, which is based in Indianapolis. "Schools have to realize that making money isn't a bad thing. They are, *and should be*, competing for the exact same dollar the Pacers and the Colts are"[26] (Emphasis added).

Schoolhouse commercialism cannot be simply dismissed as innocuous, or lauded as beneficial, to children or the educational enterprise, however. For example, the rise in obesity in children, with associated threats to life and health, is arguably encouraged by soft drinks and junk foods, which are freely available and widely marketed in schools.[27] A 2004 US Government Accountability Office (formerly General Accounting Office) report, *School Meal Programs: Competitive Foods Are Available in Many Schools*, helps explain why schools stand by arrangements that potentially harm their students. In a study of school a la carte offerings, the GAO found that while many schools offered healthful fruits, vegetables and juices, financial problems compromised those efforts. "[S]chool food authority officials told us that financial pressures have led them to serve less healthful a la carte items because these items generate needed revenue," said the GAO report.[28] The report also noted that soft drinks, ice cream, and salty, high-fat snacks were the items students purchased most often from vending machines.[29]

Corporate motives

Corporate motives, as well, are relatively easy to discern. A Nike executive insists his company gives equipment to schools "to provide opportunities for kids to fulfill their dreams."[30] Not incidentally, Nike (and other shoemakers who operate such donation programs) gets to display it logo in high school gyms and gets exclusive rights to sell additional equipment to teams and team members.[31] The man who founded Nike's contribution program, and has since worked for rivals Adidas and Reebok, sums it up: "It's a marketing ploy," said Sonny Vaccaro. "At the end of the day we've got to sell a shoe and a sweat suit. I found out a long time ago that the avenue to success is through the lowest common denominator—the high school kids. Everybody goes off the 17-year-old. They'll emulate him. They drive product sales."[32]

Indeed, corporations covet the youth market. "Market research indicates that teenagers spent an average of $103 per week last year," observed one local newspaper columnist.[33] Teenage Research Unlimited, an industry research firm, reports that spending by teens aged 12 to 19 rose three percent, to $175 million, in 2003—an average of $103 per week per teen.[34] "It's about locking in brand loyalty when kids are young," said Robert Kozinets, who teaches at the Kellogg School of Business at Northwestern University. "You get a lifetime of value."[35]

But community goodwill is another goal. When Target Corp. built a warehouse in Oconomowoc, Wisconsin, community residents weren't happy, fearing pollution and an eyesore.[36] Oconomowoc High School and Target implemented a "partnership" program that has brought about 100 students with truancy problems or at risk of dropping out onto the warehouse's premises for career development, alternative education, and part-time jobs—benefiting Target with "improved public relations" in the process. [37]

Corporations that have already been skillful in playing job-hungry communities off each other in order to wring concessions in taxes and development costs find that corporate philanthropy can, for pennies on the dollar, help soften local resistance. When Nissan North America won $363 million in incentives for a plant in Jackson, Mississippi, the company gave $20,000 to the organization 100 Black Men of Jackson, in keeping with its view of corporate philanthropy as "a key business strategy," in the words of one executive.[38] In Alabama—where automakers have gotten record incentive packages—Hyundai gave $400,000 to a reading initiative at the April 2003 groundbreaking of an assembly plant in Montgomery, and Toyota gave $500,000 to a public school foundation in Huntsville, where it has an engine plant.[39]

Lest anyone continue to think that this is about altruism, consider the remarks of a chemical company executive in the publication *PR Week*. Speaking about sponsorships of all kinds, not just in schools, Jane Crawford, of Pennsylvania-based Atofina, said: "I think there was a time when we would agree to sponsorships and not look for an ROI [return on investment]. But these days you have to get it. You just have to."[40]

And companies keep reaching to younger and younger ages. The latest target category is children from three to five years old; marketers are plying their preschools with branded worksheets, art supplies, and reading programs—knowing that by being associated with the school, they obtain an implied endorsement of their wares.[41]

Measuring Schoolhouse Commercialism Trends

As noted in previous reports, there is no database enabling us to measure directly the extent of schoolhouse commercialism. The Commercialism in Education Research Unit instead monitors media references that fall within eight categories of in-school commercializing activities, monitoring each category through searches on Education Index, Google News, and the news, marketing, and business databases of Lexis-Nexis, and counting the number of citations each search produces. (See Appendices A-C for the search terms and criteria used to define each category.) The categories are: Sponsorship of Programs and Activities, Exclusive Agreements, Incentive Programs, Appropriation of Space, Sponsored Educational Materials, Electronic Marketing, Privatization, and Fundraising. Figure 2 compares the numbers of citations in 2003-2004 with those for 2002-2003, for each of these types of commercializing activity. Table 1 shows those changes in percentages, and compares also to 1990.

Figure 2: References to Eight Commercializing Categories in Four Presses: 2003-2004 Compared with 2002-2003

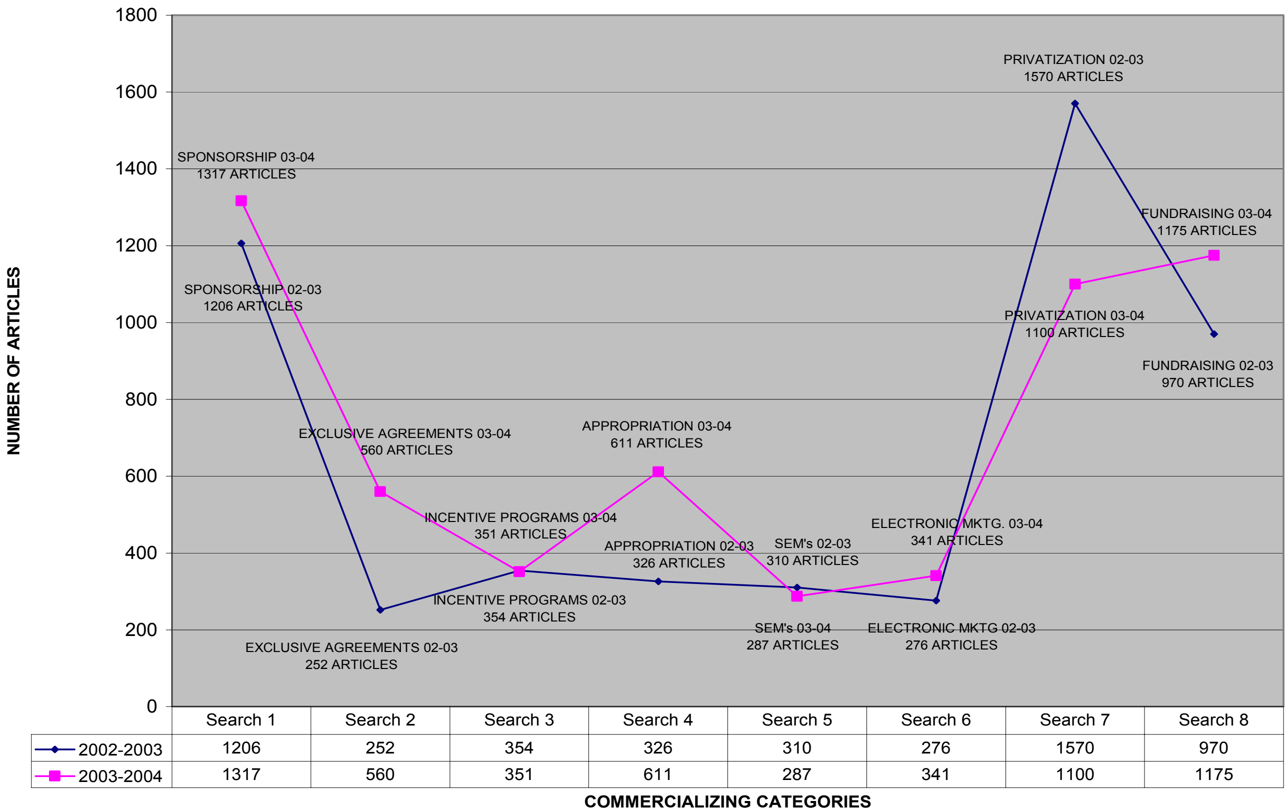


Table 1: Average Percent Changes in the Number of Media Citations for the Past Year and Cumulative Growth Since 1990 By Category

Category	Total Hits 2002-03	Total Hits 2003-04	% Change 2003-04		Cumulative % Growth 1990-2004[42]	
Sponsorship	1,206	1,317	9	↑	146	↑
Exclusive Agreements	252	560	122	↑	858	↑
Incentive Programs	354	351	- 0.8	↓	75	↑
Appropriation of Space	326	611	87	↑	394	↑
Educational Materials	310	287	- 7	↓	1038	↑
Electronic Marketing	276	341	24	↑	9	↑
Privatization	1,570	1,100	- 30	↓	2,213	↑
Fundraising*	970	1,175	21	↑	n/a	
			Near-Term Change		Long-Term Change	

*CERU began tracking fundraising in 1999-2000

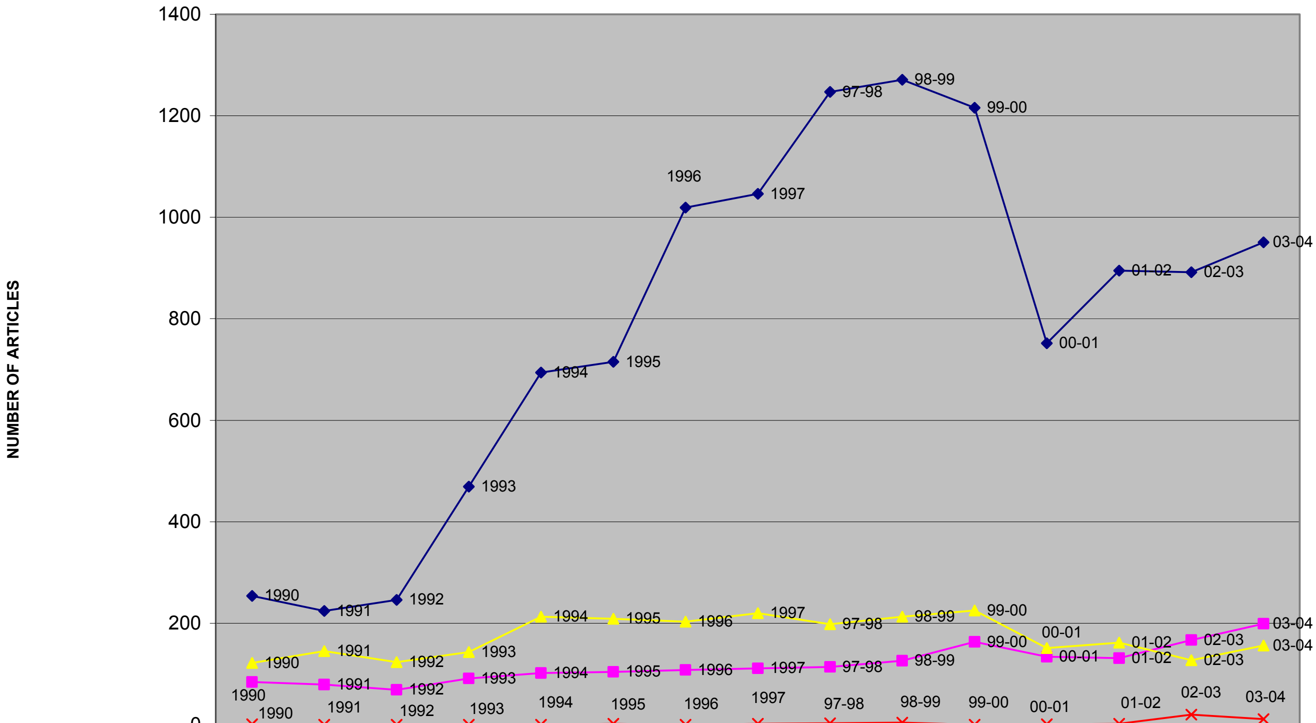
Schoolhouse Commercialism by Category

The remainder of this report summarizes, by category of commercial activity, media reports of activity produced between July 1, 2003-June 30, 2004, and characterizes the trends that emerge from this activity.

Category 1: Sponsorship of Programs and Activities

References to Sponsorship of School Programs and Activities rose nine percent in the 2003-2004 survey, with 1,317 references recorded, making it the largest category of schoolhouse commercialism activities to be reported for 2003-2004. By comparison, the category recorded 1,206 during 2002-2003. Since 1990, references have risen by 146 percent. (See Figure 3.)

Figure 3: References to Sponsorship, 1990-2004, By Year and Type of Press



	1990	1991	1992	1993	1994	1995	1996	1997	97-98	98-99	99-00	00-01	01-02	02-03	03-04
Popular Press	254	224	246	469	694	715	1019	1046	1247	1271	1216	752	895	892	951
Business Press	84	79	69	91	102	104	108	111	114	126	163	134	131	167	199
Ad/Mktg Press	122	145	123	143	213	209	203	220	198	213	225	151	162	127	156
Education Press	1	0	0	0	0	2	0	2	3	4	0	1	2	20	11

Sponsorship of Programs and Activities remains the most traditional form of corporate-school interaction. Many of the sponsorship references amounted to routine news briefs like the one that announced an upcoming golf tournament to benefit Lemon Bay High School Band Boosters in Sarasota, Florida.[43] Corporate sponsors are among the long-standing funders of scholarships awarded through the nearly 50-year-old National Merit Scholarship Program.[44] Corporations also fund scholarships, whether for employees' children or open to competition from the community at large. Coca-Cola, for instance, which along with other soft-drink makers has been a subject of scrutiny for its marketing in schools, awards college scholarships of up to $20,000 per student.[45]

Corporations also sponsor a wide range of fund-raising programs: a golf tournament in Florida to raise funds for a local school football team,[46] a McDonald's-affiliated Latin rock tour with proceeds going to fund college scholarships for high school seniors,[47] and a variety of academic competitions, such as the Invention Convention in central Ohio.[48]

Serving Commercial Ends

While typically depicted as altruistic acts of "giving back to the community," sponsorship programs often serve the donors' commercial purposes. In Austin, Texas, for instance, Ford Motor Co., seeking to make inroads among Spanish-speaking consumers, has sponsored a scholarship for Hispanic students and donated Spanish-language books to elementary schools.[49]

Canon Inc., a manufacturer of computer printers, photocopiers, and cameras, has sponsored an annual "Envirothon" in which high school students compete by making presentations on environmental protection issues. The company's sponsorship appears, among other things, aimed at bolstering its reputation as an "energy efficient" and conservation-oriented manufacturer dedicated to "the protection of endangered species and environmental education."[50]

Corporations donate all manner of goods to students and schools—often products the companies make and for which they hope to build brand loyalty. For example, Targus Inc., a maker of carrying cases for notebook computers, donated 150 of the company's backpacks to City Prep, a Bronx, New York, program that helps prepare low-income 6^{th-} and 7^{th}-grade students for selective high schools.[51]

A more unusual form of corporate sponsorship is taking place in Denver, Colorado. There, an Ohio-based company is redeveloping Stapleton Airport, the city's decommissioned airport, into a planned community that targets mixed-income residents. The company donated land for five new schools and $500,000 for labs at a charter high school. It also agreed to finance the construction of two of the new schools—steps arguably needed to make its development more attractive to prospective homebuyers.[52]

What's in it for Business

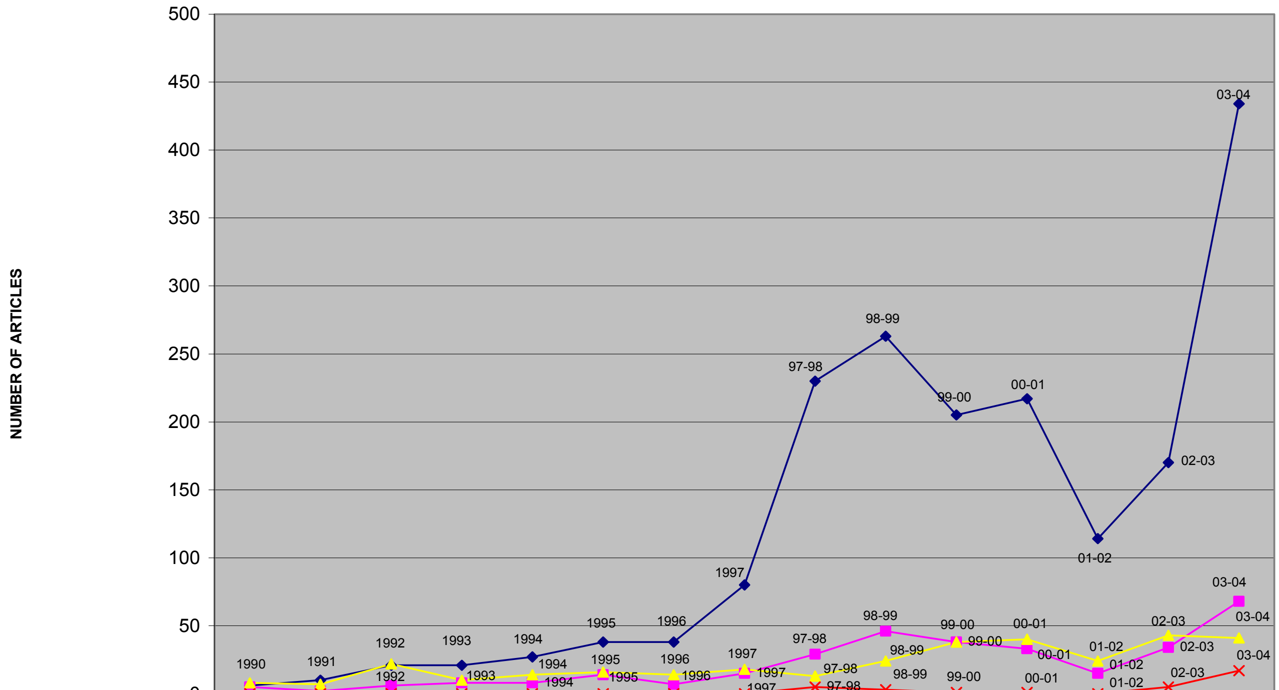
A report in the *Puget Sound Business Journal* on Tully's Coffee Corp., a chain of cafes, makes clear that corporate sponsorship isn't just altruistic. Managers "are...creating community events to promote Tully's," the article says, and goes on to recount that one has become active on a local elementary school board, donating products used to raise $140,000 for the school. "The manager then invited the school's teachers and students to a 'free ice cream Friday' promotion to receive free cones."[53]

The value of corporate sponsorship to the corporation is also illustrated by the remarks of Terry Kinder, an executive for Giant Cement Holding Co., in an interview with a trade publication. Giant Cement sponsors "Charleston's Promise," an in-school program in that South Carolina city that included mentoring, workshops, parental involvement efforts, career-planning, and children's visits to the company's quarry. Such community relations efforts, Kinder noted, helped ease concerns about the company's foreign ownership during public permit hearings for a plant expansion.[54]

Category 2: Exclusive Agreements

Exclusive Agreements give corporate marketers exclusive rights to sell a product or service on school or district grounds and to exclude the products of competitors. References to such agreements in 2003-2004 more than doubled compared with 2002-2003, with 560 references recorded compared with 252, a 122 percent year-to-year increase. Since 1990, references to exclusive agreements have risen by 858 percent.

Figure 4: References to Exclusive Agreements, 1990-2004, By Year and Type of Press



	1990	1991	1992	1993	1994	1995	1996	1997	97-98	98-99	99-00	00-01	01-02	02-03	03-04
Popular Press	6	10	21	21	27	38	38	80	230	263	205	217	114	170	434
Business Press	5	2	6	8	8	14	7	15	29	46	38	33	15	34	68
Ad/Mktg Press	8	7	22	10	14	16	14	18	13	24	38	40	24	43	41
Education Press	0	0	0	0	0	0	0	0	5	3	1	1	0	5	17

Although our study does not attempt to code for individual content, one media trend is immediately clear: The 12 months beginning with July 2003 saw the news media all over the country wake up to the controversy over soda and junk food in school vending machines. Many of the references accounting for the upsurge in exclusive-agreements references were newspaper feature stories exploring the controversy over soda sales agreements in school, which was typically pitted as a battle between profits for the school and children's health, particularly in the face of rising rates of childhood obesity. Such accounts often were tied to the introduction of legislation or policies at the state or school district levels seeking to restrict soda and junk foods, and the legislative wrangling over such bills became another recurring theme.[55]

At the same time, some references recorded—whether in brief, without discussion, or in detail, replete with controversy—the enactment of exclusive agreements. For example, in Tarrant County, Texas, Carroll school district trustees signed deals putting Chick-fil-A and Little Caesars Pizza products on campuses and at stadium events, for $603,000 in sponsorship rights and sales profits for one year.[56] Another example, a twist on the familiar practice of "product placement" (when filmmakers negotiate deals with marketers to use only their products in movies, in return for considerations such as free products or fees) occurred when Tualatin High School in Oregon was used as a movie set. Because of the school district's exclusive contract with Coca-Cola, no one on the premises of the school/set was allowed to have soft drinks from competing marketers.[57]

Soft drinks and junk foods are not the only services for which such exclusive agreements exist. Photography firms, for example, sign exclusive agreements with schools in which they require families to use the firm's picture in school yearbooks and in return provide yearbook publication services. A bill that would have reined in that practice in Connecticut died in the state legislature in 2004.[58]

Trading Health for $50 Million

But the lion's share of such agreements revolved around food and beverages. What is certainly one of the largest such contracts—if not the largest—was signed in 2003 at the Hillsborough County (FL) school district: a $50-million, 12-year pact with Pepsi Bottling Group, ensuring that vending machines in the county's 62 middle and high schools would sell only Pepsi products.[59] "I agree that sodas are not the best thing in the world for you, but we have to find every possible resource to educate our children," a school board member told the *St. Petersburg Times*. Further noting the school's "obligation" to provide healthy food and teach about healthy diets, Candy Olson, a board member, added: "I don't think the schools have the responsibility of being the food police. And I don't think schools should be expected to turn up their noses" at $4 million annually.[60]

Such agreements can act as a sort of conceptual gateway, opening schools up to other forms of commercial involvement. A *Tampa Tribune* editorial writer, advocating that cash-strapped Pasco school district sell naming rights and advertising on buses, observed in support of his proposal: "The district already has a contract with Pepsi for exclusive beverage rights in schools. The door has already been open."[61] By contrast, though, an editorial writer for the competing *St. Petersburg Times* penned a commentary lauding two Pasco County schools for rejecting Pepsi contracts for vending machines that would have operated all day.[62]

The Threat of Corruption

Exclusive agreements also may offer opportunities for corruption. That was the charge in New York City when Snapple won an exclusive contract to sell beverages in city buildings, including schools, in return for $40 million to the district for athletics and other activities. New York City Controller William Thompson said Snapple was awarded its bid "through a tainted process with a predetermined outcome that was not the best deal for the city of New York."[63] Superintendent Joel Klein denied the accusation.[64] *New York Sun* writer Andrew Wolf related the account of an unidentified elementary school principal who refused to permit a Snapple vending machine in his school's lunchroom, despite pressure from a Snapple representative. A week after he turned away that representative, the principal was confronted with the delivery of two more machines, and claims that there was a signed contract from the school principal—who had done no such thing. A union representative from the Council of Supervisors and Administrators (CSA) told the *Sun* that "this encounter was not unique," Wolf wrote. He quoted CSA spokesperson Richard Relkin: "Not all principals know that they can say no to Snapple. And there are those who know that they can say no, but are too intimidated to do so." Wolf said the anonymous principal pointed out that in a school such as his, where most children were on the free lunch program and already were provided with milk or juice, outside products posed several problems: pressure to spend money "that some of their parents can't really afford to give them," conflicts over money brought to school, and the likelihood of too much sugar even in purportedly healthful drinks.[65]

In Connecticut, meanwhile, state Attorney General Richard Blumenthal opened an investigation of the state's Board of Education and Services for the Blind (BESB) and its contract with Coke, amid allegations that the agency was being shortchanged under its agreement and yet administrators were ignoring the problem. BESB officials insisted that there was "no substance" to the allegations.[66]

Resistance Grows

A growing number of schools, school boards, and communities, however, are re-examining soda contracts in light of growing concern about childhood obesity. The American Academy of Pediatrics in January 2004 issued a statement declaring that soft drinks did not belong in schools and calling for pediatricians to take up the fight to remove them.[67]

Local and statewide bans on soft-drink sales in schools increased in popularity. As many as 15 states introduced legislation restricting school vending machine sales, and individual school districts began taking action as well.[68] On the other hand, in some states, the trend was reversed: Florida, for example, had issued guidelines barring the sale of soda in schools until one hour after the last lunch period of the day. In 2003, the state changed its rules to permit soda sales all day if non-carbonated fruit juices also were available.[69]

In Lake County, Florida, near Orlando, the school board voted in December 2003 to limit vending machine sales to water, juice, and sports drinks—and gave up a $5 million, 10-year contract with Pepsi as well; members cited nutritional concerns.[70] Meanwhile, in the Hillsborough district (the one with the $50-million deal), Principal Tom Rao dismissed as "a reactionary thing" a state bill to ban carbonated drinks and others high in sugar from school vending machines.[71]

Philadelphia public schools banned selling soda in an action initiated by schools chief executive Paul G. Vallas, unhappy because of poor nutrition and increasing childhood obesity.[72] The district followed through in early 2004, with the School Reform Commission voting 3-2 to permit only 100 percent juice drinks; drinking water without sweeteners, flavors, or colors; and milk and milk-flavored drinks.[73] In doing so, the district was following a trend evident throughout suburban Philadelphia's school districts.[74]

Aldermen in Chicago introduced a resolution urging that school district to limit "the sale of minimally nutritious food and beverages,"[75] and the Chicago Public Schools subsequently banned soda and junk food from vending machine on orders from CEO Arne Duncan.[76] The DeKalb County (GA) school board barred schools from selling soft drinks, candy, and other items during the school day.[77] The Austin, Texas, school district approved a district-wide ban on sodas and junk food in vending machines, although under US Department of Agriculture rules, chocolate bars, chips, and sugar-laden pastries were still permitted, along with more healthful snacks such as canned tuna, trail mix, and baked potato chips.[78]

South Carolina's state Senate Education Committee considered a bill that would bar junk food from schools that did not comply with dietary requirements of the National School Lunch Act. The legislation would eliminate vending machines, fast food, and candy sales of non-nutritive foods high in calories, fat, or sugar and would permit the sale on school premises only of 100 percent fruit juices and water, low-fat milk, and other more nutritious offerings.[79] Under the Competitive Foods Policy of neighboring North Carolina, schools were ordered not to sell "competitive foods"—that is, foods competing with lunchroom offerings—in or within 35 feet of school lunchrooms, unless profits funded school lunch programs; only high schools were permitted to sell sodas, and there not during lunch periods; and foods of minimal nutritional value were barred from a la carte lines.[80] California's legislature passed and then-Governor Gray Davis signed the

California Childhood Obesity Prevention Act, taking effect July 1, 2004. The act restricted junk food and candy sales in schools.[81] It limited elementary schools to selling water, milk, or 100 percent fruit juice and middle schools to selling water, milk, fruit drinks with at least 50 percent juice and no added sugar, and sports drinks such as Gatorade.[82] A bill passed the New York Assembly June 1, 2004, banning candy and soda from school vending machines, and was sent to the state Senate, which had not acted on it by mid-July.[83]

Vending Machines Cost Schools

In Texas, the state Agricultural Commissioner, Susan Combs, conducted a four-month study of school vending machines and concluded they cost schools' food services $60 million in sales annually. Combs sought open records information on school district vending contracts, and reported that 52 percent of the districts that responded had exclusive food and drink vending contracts.[84] The department also issued a statement calling on elementary schools to "prevent students from accessing FMNVs [Foods of Minimal Nutritional Value] on school premises. Such food and beverages may not be sold or given away on school premises…during the school day."[85]

In West Virginia, a study by the state Education Department's Office of Child Nutrition found that a state law requiring soda and snack machines to be turned off during breakfast and lunch periods "is seldom enforced." The report recommended that the state school board require counties, not schools, to approve and sign beverage contracts and review them to ensure aggressive monitoring. The report also recommended that more healthful alternatives to soft drinks, such as milk, juice, and water, be made available at competitive prices.[86] On the heels of the report, a candidate for governor in the state vowed that if elected, he would remove junk food from schools.[87]

When Central York School District considered whether to sign an exclusive deal with Pepsi or Coke, the district's athletic director saw as "the only downside" the fact that the district would be able to deal with only one company. School board members, however, took note of rising obesity concerns as well as efforts elsewhere to remove soda machines.[88]

More Healthful Alternatives

In the face of some claims that more healthful options to soda and candy do not sell, the Utah Health Department and University of Utah found that when more nutritious options were offered in vending machines at three Utah middle schools, they "sold fairly well against the candy and soft drink machines."[89] In Rosemont High School in Minnesota, however, administrators reported that when soda vending machines were replaced with fruit juice and water machines, monthly revenue dropped by 10 percent to 15 percent.[90]

St. Paul, Minnesota, schools implemented a rule requiring 75 percent of beverage and snack vending machine slots be taken up with healthful drinks and snacks.[91] These sound for the most part like positive developments. At times, however, more healthful options give school districts political cover for not rejecting less healthful ones. In Georgia, the Cherokee County school board rejected a plan that would have limited the sale of soft drinks by permitting them only in the gymnasium or cafeteria areas. In deciding not to change its current policy, which permitted sweet drinks and fatty foods, the district's superintendent, Frank Petruzielo, said the board reasoned it was enough that vending machines already offered more nutritious products such as low-fat pretzels, fruit leather snacks, and trail mix.

In addition to sparking criticism from health authorities, exclusive drink contracts from time to time draw opposition from competing businesses. A Syracuse, New York,-based maker of sports drinks, Larry Alibrandi, is suing the Fulton, New York, school district, alleging that its 10-year, $500,000 contract with Coke circumvents a competitive bidding process that he had won to sell Z'lektra sports drinks in area schools; his agreement was voided as a result of the Coke deal.[92]

School districts often resist giving up the contracts, fearing the loss of funds will further hamper their operations, and sometimes join campaigns to turn back bans on soda in schools. "[S]imply banning soft drinks will have little impact on the problem" of obesity, the executive director of the National Association of State Boards of Education complained in a letter to the editor of *Education Week* in the fall of 2003, adding later: "We also should not ignore the unintended consequences of restricting schools' freedom to create business partnerships at a time when cuts in school budgets make every dollar count."[93]

Seattle's Halfway Ban

In Seattle, Washington, the school board agreed to limits on an exclusive agreement with Coca-Cola, but stopped short of an outright ban on soft-drink sales[94] in a deal worth about $390,000 a year.[95] The board required Coke to reserve three slots in each vending machine for water and 100 percent fruit juice, added a clause allowing it to cancel the new five-year agreement, and required that middle school vending machines be turned off until after school each day.[96] The partial measure did not satisfy George

Washington University law professor John Banzhaf III, a tobacco lawsuit expert and activist, who said he was interested in aiding any Seattle lawyer who would want to pursue a lawsuit against the district.[97]

Banzhaf, dismissing the three-slot requirement, told an interviewer: "I wonder what proponents of this view would say if someone suggested that the school could also make money by having vending machines in the school which would sell other lawful products like *Playboy*, *Playgirl*, and *Hustler* magazines? Would that proposal be acceptable if three slots were reserved for *Time*, *Newsweek*, and *US News*?"[98] Seattle attorney Dwight Van Winkle says a lawsuit would be grounded in the premise that "I don't think the School Board has any authority to be offering children up for sale to Coca-Cola."[99] The lawsuit threat did not deter the board, which renewed the contract.[100]

School Boards and Students Side with Marketers

A study in the *Journal of School Health* published in February 2004 zeroed in on the internal contradictions in the thinking of school board members. On the one hand, board members responding to an attitude survey spoke in support of "providing healthy food options, establishing minimum nutrition standards for fast foods, and limiting and monitoring food and soda advertisements in their districts."[101] At the same time, however, "of those who knew they had an exclusive beverage vendor contract, just 31 percent did not agree with awarding such a contract, and 26 percent wholly supported it," the researchers wrote. "Thus, many board members remain uncommitted on this issue, presumably either from lack of familiarity with the issue, or lack of priority where it is concerned."[102]

Students sometimes fight for their right to soda pop. Caleb Powers, a Free State High School student in Lawrence, Kentucky, complained at a school board meeting where elimination of soda sales was being considered, "It's not really the board's place to come in and say, 'You can't have this.'"[103] The board deferred a decision, initially, but ultimately, spurred on by hopes of gaining $1 million to $3 million a year,[104] decided to seek bids on an exclusive contract, albeit one with limitations on hours and offering juices, waters, and other drinks besides soda.[105] The soda ban in Austin, Texas, prompted high school senior Greg Lesson, who drank a Sprite a day, to complain about students' lack of choice: "Would they rather us be upset and drink healthy or drink sodas and be happy?"[106]

For its part, Coke responded with new "model guidelines" that ended the use of the soft drink maker's logos on textbooks and curriculum materials and vowed to provide water, juices, and other drinks along with sodas where it sold soft drinks in schools.[107] "The company and its bottlers are fighting to keep their presence in schools, amid criticism that soft drinks contribute to obesity among young people," observed the *Atlanta Journal-Constitution*.[108] Centerville, Ohio, pediatrician and school board member David Roer, whose school district has banned all soft drinks and replaced them in vending machines with water, milk, and juice, responded that the guidelines were "a good start from Coke but the ultimate goal would be to get rid of carbonated beverages and provide more nutritious products."[109]

Rivals Join the Game

While soda purveyors fight to retain their access to student consumers, and school administrators fear the loss of revenues, other marketers have found an opportunity. Roy

Warren, the chief executive officer of Bravo Foods International Corp., a marketer of dairy products through vending machines, told securities analysts in a conference call August 12, 2003, that the company saw "new opportunities to diversify" as school districts began phasing out soft drinks "and looking for more nutritionally fortified products…"[110] Dairy industry groups offered schools modest rebates (typically $1,000 per machine) for installing milk vending machines.[111] Switch Beverage Co. of Richmond, Virginia, a maker of carbonated 100 percent fruit juice, persuaded the US Department of Agriculture to declare it permissible in schools during meal times under the USDA's restrictions barring "foods of minimal nutritional value" during school lunches. Switch also has developed contract agreements similar to those of soda companies that reward schools for stocking its products.[112]

Andrea Boyes Gets the Last Word

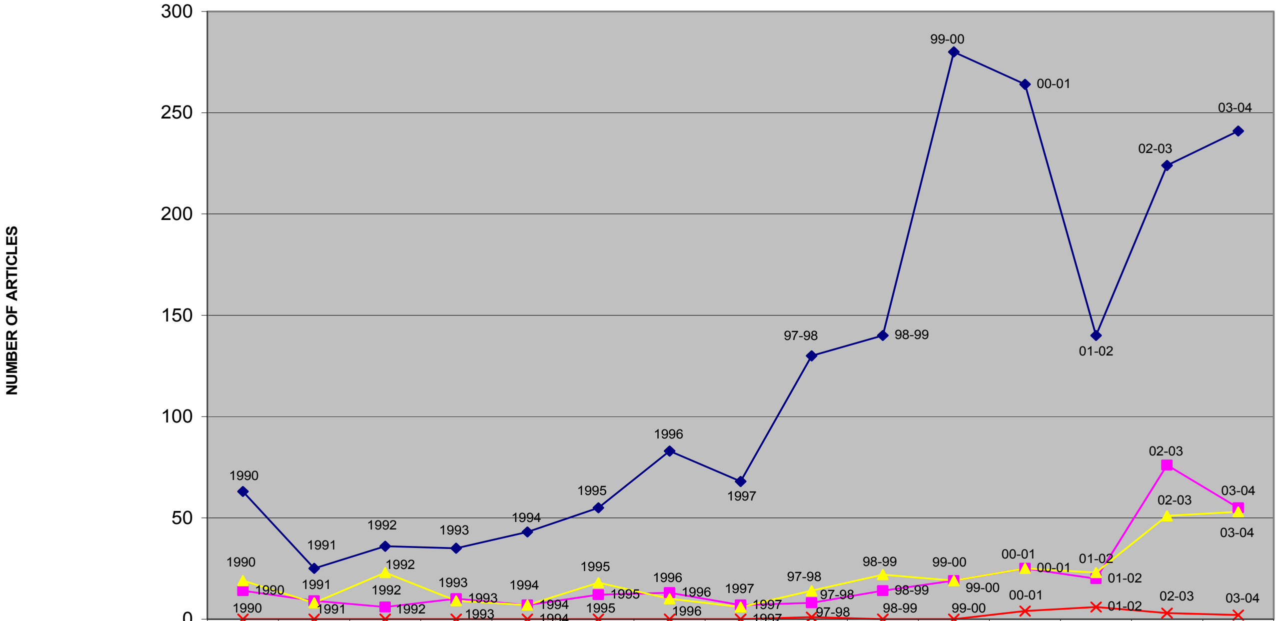
In 2003, the "poster child" for the issue of the negative impact of exclusive agreements was Andrea Boyes, who had planned to sell bottled water at West Salem High School in Oregon to raise funds for her cheerleading squad but was forced to take her sales off campus because of the school's contract with Pepsi.[113]

In late October 2003, a video crew visited West Salem High School to tape a segment about Boyes. The Comprehensive Health Education Foundation (www.chef.org) engaged Culp Productions Inc. (www.culpproductions.com) to produce a video series for health education curricula. Among the subjects the producers chose to include in the production was Boyes' project, selected to illustrate "following through on a health-related project, with its civic-minded overtones and resulting community involvement."[114] Although by design the production was apparently not going to focus on the controversy surrounding Andrea's project, her father wrote in a personal communication to groups and scholars monitoring schoolhouse commercialism, “what appeared to be a loss for Andrea, civic duty, creativity, and the rights of individuals to make a difference in our Public School system will instead be re-born in a new form. One that can't be stopped or derailed.”[115] Andrea's father noted the irony, however. “A project held up by pouring rights contracting with a Public school district is, at the same time, worthy of inclusion as an educational example in the health awareness curriculum for Public school districts? This seems to me to be yet another clear indication of the adult irresponsibility and generally wrongful nature of Pouring Rights contracting on the whole.”[116]

Category 3: Incentive Programs

Incentive programs provide some sort of reward in the form of a commercial product or service in return for students who achieve an ostensibly academic goal, such as perfect attendance or increased reading. Media references to such programs were essentially flat, dropping by about 0.8 percent to 351 in the 2003-2004, from 354 references in the 2002-2003.

Figure 5: References to Incentive Programs, 1990-2004, By Year and Type of Press



	1990	1991	1992	1993	1994	1995	1996	1997	97-98	98-99	99-00	00-01	01-02	02-03	03-04
Popular Press	63	25	36	35	43	55	83	68	130	140	280	264	140	224	241
Business Press	14	9	6	10	7	12	13	7	8	14	19	25	20	76	55
Ad/Mktg Press	19	8	23	9	7	18	10	6	14	22	19	25	23	51	53
Education Press	0	0	0	0	0	0	0	0	1	0	0	4	6	3	2

Pizza Hut's "Book It" program offers children free pizza for achieving certain reading goals, and adds to its program by bringing celebrities into classrooms to read to students on November 11, National Young Readers Day.[117] McDonald's provides a variety of incentives, the rewards being for the fast-food giant's products.[118] The AMC Theatres chain of movie houses offers children free concessions for reading three books.[119] The Six Flags chain of amusement parks offers free admission to children who maintain a log, monitored by adults, indicating they have read a total of 360 minutes worth of material during the school year.[120] Papa John's Pizza outlets give schools "Winner's Circle" cards for free pizza, donuts, ice cream, video games, and museum visits, to be distributed to students who earn all Cs or better on report cards.[121] In Houston, Texas, students who attain perfect attendance records are rewarded with packs of National Football League player trading cards, posters, and other pro-football booty. The program, which focuses each year on the city designated to host the Super Bowl, is sponsored by makers of sports trading cards.[122]

Barbies for an Essay

The Mattel Corp., maker of the Barbie doll, awarded a $5,000 grant to Atlanta, Georgia, art teacher Becky Mahan and $100 worth of Mattel toy merchandise to 10-year-old Michelle Hartigan, as a reward for Michelle's "inspirational essay" about teacher Mahan as part of the National Barbie Arts Teacher of the Year search, sponsored by Mattel and by the entertainment Industry Foundation. Michelle's essay was a semifinalist, and was to compete in the National award competition, for an additional $10,000 prize.[123]

Participants in Operation Read, a literacy program in the Los Angeles County schools, who read the last book of J.R.R. Tolkien's *Lord of the Rings* and wrote an essay about it, were rewarded with a day off from classes for an advance showing of the movie based on the book: *The Return of the King*.[124] Scholastic Corp., the children's book publisher and distributor, teamed up with the non-profit Heifer International, which donates livestock to impoverished families around the world, in an incentive program to encourage reading. By fulfilling pledges to read a certain number of books in return for money from friends to be donated to Heifer International, students were told they could earn book donations to their schools from Scholastic and an additional donation to the charity from the book company.[125] Scholastic also teamed up with other charities in similar programs.[126]

<u>Incentives for Attendance and Testing</u>

Some incentive programs may receive low-key corporate sponsorship. In Dallas, for example, students who pass advanced placement exams can qualify for $100 rewards, issued through Advanced Placement Strategies Inc., a non-profit that seeks to make AP classes "a more integral part of high school academics,"[127] particularly in low-income communities. The rewards are funded by corporations and philanthropic groups that, for now, remain in the background.[128] With state aid usually contingent on attendance figures, schools are looking for ways to reward students materially just for showing up—and letting corporations foot the bill. For example, corporate sponsors paid for prizes to be drawn for by students with perfect attendance the first week of school in Corpus Christi, Texas.[129]

In a similar vein, with the No Child Left Behind Act's emphasis on high-stakes testing as a measure of whether schools were adequately raising achievement levels, some schools turned to commercial incentives to boost student participation in tests. Case High School in Racine, Wisconsin, handed out movie passes to every 10th grader participating in the Wisconsin Knowledge and Concepts Examination, the statewide standardized test, in November 2003. Schools contended they needed such incentives. Federal law punishes schools by allowing students to transfer elsewhere if fewer than 95 percent of students take tests for two years in a row. For the students themselves, the tests mean nothing: they don't count toward any grade, they don't count for graduation, and they don't appear on official transcripts.[130]

In addition to movie passes, Case High School students who simply showed up for the tests qualified for $10 cash awards, shopping mall gift certificates, school-spirit wear, and other prizes. Another Racine school, Horlick High School, planned raffles for test days at which students could win a TV set, a DVD player, or CDs. Both schools instituted the incentive programs because their test-participation rates fell below 95 percent in 2003 and they wanted to avoid the two-consecutive-year penalty for that. A newspaper report on the program did not say whether the various rewards were paid for out of school funds, or whether any of the rewards were provided to the schools by corporations or marketers.[131]

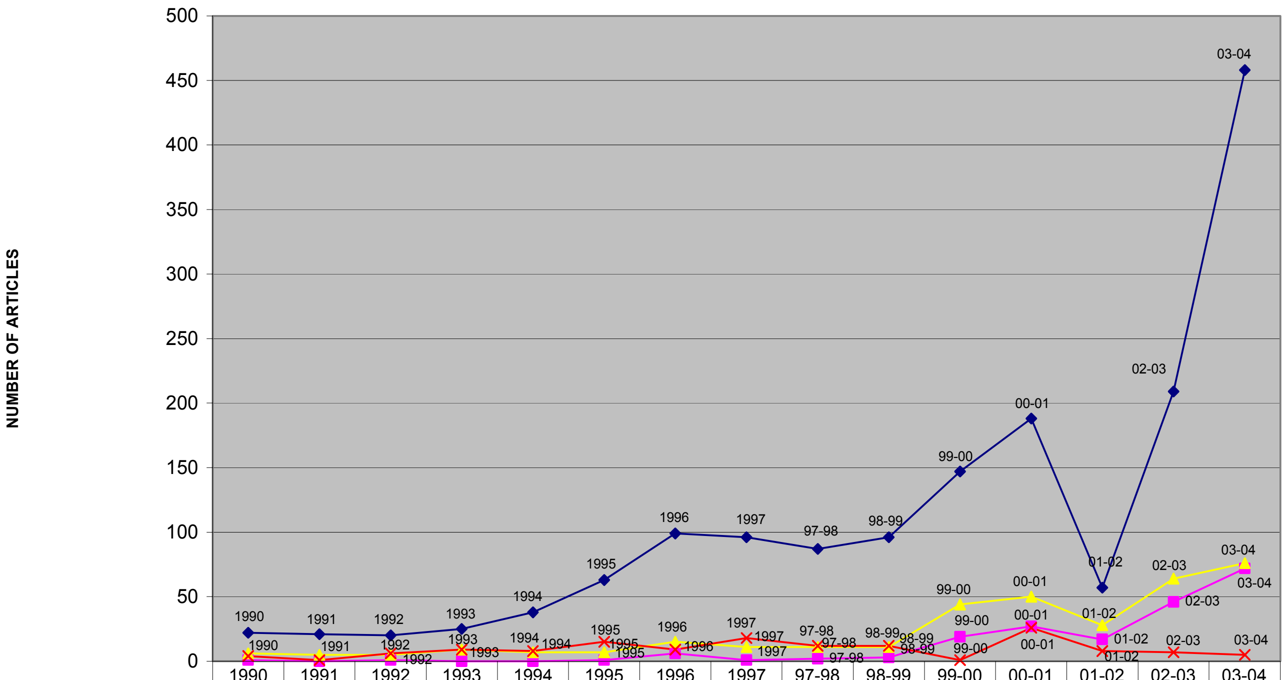
The Ultimate Incentive?

The end result of such incentive programs contributes to a shifting view of education from a collective, public good that engages the next generation in the American civic life to an individual, private good that becomes another consumer product and thereby helps reinforce a consumerist ideology. Thus a suggestion in *Forbes*—issued in all apparent sincerity—becomes completely unsurprising: Edward Miguel, writing in the November 24, 2003, issue of the business magazine, argues that students should be awarded cash for scoring high on standardized tests, and contends examples from Kenya, Israel, and the United Kingdom demonstrate that such a policy can lift achievement. Even students who did not qualify for the incentives lifted their scores, Miguel claimed.[132]

Category 4: Appropriation of Space

Appropriation of Space is the use of school property to promote individual corporations through mechanisms such as naming rights or general advertising. References in this category rose by 87 percent, to 611 references in 2003-2004 from 326 in 2002-2003. Since 1990, such references have risen 394 percent.

Figure 6: References to Appropriation of Space, 1990-2004, By Year and Type of Press



	1990	1991	1992	1993	1994	1995	1996	1997	97-98	98-99	99-00	00-01	01-02	02-03	03-04
Popular Press	22	21	20	25	38	63	99	96	87	96	147	188	57	209	458
Business Press	1	0	1	0	0	1	6	1	2	3	19	27	17	46	72
Ad/Mktg Press	6	5	5	9	7	7	15	11	11	11	44	50	28	64	76
Education Press	4	1	6	9	8	15	9	18	12	12	1	26	8	7	5

Advertising is pervasive in schools. In December 2003, Marvel Enterprises acquired Cover Concepts from Hearst Communications. Cover Concepts distributes book covers, coloring books, posters, and calendars in 43,000 public schools; the materials are laden with ads, and Marvel in making the acquisition said it hoped the deal "will widen its exposure to a younger demographic" while also helping the comic book maker "keep its classic comic characters current and hip with the audience that matters most to filmmakers and toy sellers."[133]

School Buses as Rolling Billboards

One recurring theme in this category for the year under study was school bus advertising. Growing numbers of schools made plans to raise money by selling ads on school buses, either to be seen by the youthful riders or by members of the public passing by. Plans were approved or proposals made in Lee County, Florida,[134] Braintree, Beverly, and Plymouth, Massachusetts,[135] Lake Oswego, Oregon,[136] Tulsa, Oklahoma,[137] and Miami-Dade County, Florida,[138] among other communities. Not all bus ad programs succeeded, however. In Putnam County, Florida, a school bus ad agency signed a contract expecting 13 neighboring counties to sign on as well. They did not, leaving the agency with too small a base to lure big-ticket ads from companies like Tropicana, Dole and Office Depot.[139]

Advertising is not limited to buses. Scoreboards with corporate logos have been another popular advertising medium. Game programs are a long-standing vehicle for such ads. Occasionally, however, school advertising backfires, as when a Catholic school in Pittsburgh published in its girls' high school basketball program an ad for a provider of exotic dancers. The ad touted the dancers' services for, among other things, divorce parties. "Everyone involved in this is totally embarrassed by it," said a spokesperson for the Pittsburgh Catholic Diocese.[140]

Circumventing Advertising Restrictions

In some places, long-standing rules or laws against in-school advertising have led school officials to seek loopholes. At Hampshire High School in Illinois, school board members grappled with ways to allow corporate sponsorship of a new scoreboard—including a company logo—without running afoul of a longstanding rule forbidding advertising on school property.[141] Less than half a year later, the school's governing body, the board of Community Unit District 300, had drawn up and unanimously approved a policy allowing corporate ads on scoreboards and outside auditoriums and other common areas, while asserting the board's right to vet all ads. "Since we don't have [enough] revenue sources, this helps us augment whatever we need in the buildings and to make sure whatever goes up we have control over," said Mary Fioretti, who chaired the board's policy committee that drew up the new provision.[142]

Naming Rights Spread

Naming rights, a novelty in school commercialism just a few years ago, became increasingly widespread. Schools in Tacoma, Washington,[143] suburban St. Louis, Missouri,[144] Lee County, Florida,[145] Charleston, West Virginia,[146] Round Rock, Texas,[147] and Visalia, California,[148] were among the many that sold or contemplated selling naming rights to new, existing, or rebuilt stadiums.[149] Reaction was mixed, but editorial hand-wringing was common, such as the endorsement, with misgivings, by the *Tacoma News Tribune* of a naming-rights sale there: calling the plan "a lamentable sign of the times," the newspaper ultimately declared it "a creative way to raise upwards of $500,000 over 20 years" – and preferable to "pay-for-play" athletic fees.[150] Elsewhere, opposition was more firm: "Corporate naming…is a public relations ploy intended to enhance a company's presence in the community and its bottom line," editorialized the *Hartford Courant*, opposing a suggestion that naming rights be sold for a middle school in its area. "That's a mean-spirited message. For a public building, one bought and paid for with public money, it's also the wrong message."[151]

Plenty of schools seem ready to send that message, however, and do not just limit naming rights to sports facilities. Brooklawn, New Jersey, pioneered the sale of school-facility naming rights in 2001 by naming a gym for a local supermarket. Now, the school district there has begun auctioning off naming rights to schools and other facilities on eBay.[152] "I know all the arguments that it would be wonderful if the state could come up with the money," said local superintendent John Kellmayer, who acknowledged the deals put the district on "a slippery slope." But with an aging population and no increases in state aid, "we're raising almost 40 percent of our budget from non-traditional revenue."[153]

Some naming rights plans fell flat. Although the Papillion-La Vista school board in suburban Omaha, Nebraska, hoped to sell naming rights to its new high school stadium for $500,000,[154] that plan ultimately foundered, leaving the district having to spend between $700,000 and $2.1 million in tax money to complete the facility, with no corporate naming-rights buyer in sight.[155]

An Ambitious Plan Falls Short

An even bigger high-profile experiment in school-based advertising proved disappointing for the school district that launched it. An array of packages allowing companies to advertise on school buses, stadiums, and a middle school roof was supposed to help the Grapevine-Colleyville school district in Texas bridge funding gaps, but after seven years, the program "has failed to produce the revenue the district was hoping for, and school officials are looking for ways to make the program work."[156] Few sponsors actually showed interest, and the district was disappointed that the program yielded only $65,000 a year in its most recent two years.[157] Moreover, the program at times created internal conflicts with other corporate sponsorship programs: "Susan Barzelay, a parent in the district, said some booster club members expressed concerns when the district encouraged them to purchase products sold by the district's sponsors at a time when the clubs were receiving financial support from those sponsors' competitors."[158]

Naming rights also still provoke some resistance. Selma (CA) High School basketball coach and athletic director Randy Esraelian grappled with funding problems and was willing to explore corporate sponsorship. At the same time, however, he told a reporter: "We don't want to name facilities [after a company], and we don't want our uniforms to be billboards."[159]

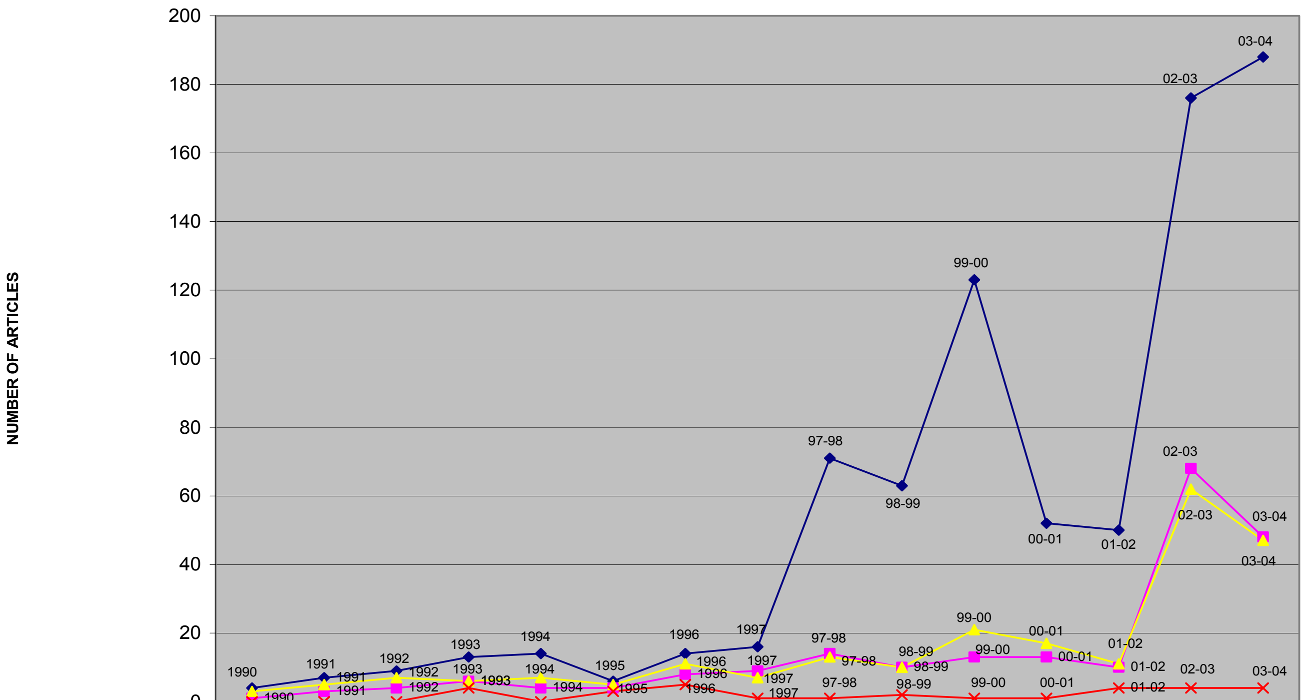
Younger and Younger Markets

Beyond naming rights and school bus ads, appropriation takes place in other forms, and with ever-younger age groups. American Greetings, for example, licensed use of its "Care Bears" characters to Youth Marketing International (YMI) to distribute to preschools. The free Care Bears posters and worksheets are purportedly designed to teach children emotional vocabulary—something that YMI's president, Joel Ehrlich, noted fits with American Greetings' line of what he called "social-expression products"—greeting cards.[160]

Category 5: Sponsored Educational Materials

Sponsored Educational Materials are those curriculum materials produced largely by an outside corporate entity for use in public schools. References in this category fell seven percent, to 287 in 2003-2004, from 310 in 2002-2003. References since 1990 have risen 1,038 percent, however.

Figure 7: References to Sponsored Educational Materials, 1990-2004, By Year and Type of Press



	1990	1991	1992	1993	1994	1995	1996	1997	97-98	98-99	99-00	00-01	01-02	02-03	03-04
Popular Press	4	7	9	13	14	6	14	16	71	63	123	52	50	176	188
Business Press	1	3	4	6	4	4	8	9	14	10	13	13	10	68	48
Ad/Mktg Press	3	5	7	6	7	5	11	7	13	10	21	17	11	62	47
Education Press	0	0	0	4	0	3	5	1	1	2	1	1	4	4	4

Lifetime Learning Systems, billed as the largest marketer and producer of corporate sponsored teaching aids, operates to link corporations with schools. On its website, the company boasts that it "knows how to link a sponsor's message to curriculum standards and create a powerful presence for your message in America's classrooms, with informative and engaging materials."[161] An Irish marketing expert commented in the *Irish Times*: "The purpose of these publications is not to open children's minds but to fulfill marketing objectives resulting in reported widespread bias in the content of the learning material."[162]

Curriculum as Propaganda

For corporations to provide curriculum materials directly related to their industries is inherently problematic, risking that students will receive distorted or self-serving messages. Consider, for example, the "Pick Protein" curriculum, distributed by the Weekly Reader Corp. "to teach students in grades 9-12 about choosing a healthy lifestyle."[163] Co-sponsors of the curriculum are America's Pork Producers, the trade group for pork-product marketers. The material "encourages students to consider what they eat, and to make informed choices, including lean protein sources such as pork, as an important part of a healthy lifestyle."[164]

Parents and teachers alike should have every reason to question whether the material provides a full, complete and balanced appraisal of, for example, the health benefits of a vegetarian diet, or the conditions under which pigs are raised and their meat is processed. Similar questions might be raised about whether McDonald's free elementary school nutrition program "What's on your Plate"—teaching "the importance of physical activity and making smart food choices"[165]—inappropriately diverts classroom discussion from the high fat, sugar, and sodium content of the fast-food purveyor's products.

Some programs would appear to be little more than advertising, such as the "Elf study guides in the shape of toys"[166] being distributed to 10,000 schools by New Line Cinema in advance of the release of its film *Elf* in late 2003. Other programs may impart some genuine value—along with free advertising for the sponsor. In Florida, BankAtlantic distributed a math workbook to elementary school students with math problems with a banking theme—not incidentally building name recognition with the youngsters.[167] Court TV won an industry promotion award for its "Forensics in the Classroom" curriculum, which "built public support for science in schools—and won itself millions of brand impressions."[168]

A Lesson in Copyright

Other programs may produce more subtle problems. For instance, the Motion Picture Association of America spent $100,000 to distribute materials aimed at discouraging music and movie piracy to classrooms for children in grades 5 through 9. "What's the Diff: A guide to digital citizenship" is a lesson plan that seeks to discourage people from free on-line file-sharing services with the message, "If you haven't paid for it, you've stolen it."[169] The program raised objections from civil libertarians for not addressing nuances in copyright law such as fair use. "This is really sounding like Soviet-style education," said Wendy Seltzer, a lawyer for the Electronic Frontier Foundation. "First they're indoctrinating the students and then having students indoctrinate their peers…The takeaway message has got to be more nuanced. Copyright is a complicated subject."[170]

A similarly one-sided "lesson" may be found in the field trip that US Sugar Corp. paid for South Plantation High School environmental science students in Miami, Florida. During the all-expenses paid visit to the US Sugar refineries and cane fields in Clewiston, Florida, students "heard US Sugar's position that it doesn't pollute the Everglades as much as the media and critics claim."[171]

Aiming to improve the “financial literacy” of students, Merrill Lynch & Co. Inc. produced a 15-lesson curriculum and video series, and in Rockville, Maryland, a federal credit union established “mini-branches” in a half-dozen Maryland schools, where students can bank and work as tellers.[172] The owner of an embroidery company in Bermerton, Washington, obtained free creative consulting for a new logo, slogan, brochures, business cards, and print advertising for his products from students in a marketing class at Bremerton High School, using curriculum guidelines from the Distributive Education Club of America. [173]

The National Academy of Travel and Tourism and state restaurant associations, including one in Louisiana, work with high schools to create training programs for the hospitality industry.[174] It does not seem coincidental that the program is funded by a foundation associated with Citigroup, a marketer of credit cards, as well as the state restaurant association. Unlike some business-sponsored curricula, however, the academy is not free; it costs schools $5,000.[175]

Imparting Corporate Values

Some corporate curriculum materials do not necessarily relate directly to the company’s products, but are intended to promote a company’s cultural values. For instance, MassMutual Financial Group and its Oppenheimer Funds unit sponsor an “educational outreach program” for middle-school children, in use in 2,500 classrooms, that focuses on “character education” and offers “lessons on tolerance, body image, diversity and teamwork.”[176]

Chick-fil-A, a fast-food chain that articulates its “statement of corporate purpose” as “to glorify God by being a faithful steward of all that is entrusted to us and to have a positive influence on all who come in contact with Chick-fil-A,"[177] gives a "Core Essentials" character-education curriculum to 1,100 elementary schools around the country, reaching, by its own count, 575,000 students a year. The company also has incentive programs for reading and attendance in schools with which it forms partnerships, and gives out books on partnership with public television's reading show, "Between the Lions."[178]

To be sure, for-profit corporations are not alone in providing curricular materials to schools in hopes of benefiting from the exposure. The Audubon Society's local chapter in Syracuse, New York, donated free "classroom kits" to area youth organizations, including schools. The kits included a newspaper for pupils, teacher resource manuals, subscriptions to the national Audubon Society magazine, and local field trips.[179]

Field Trip Factory

Increased attention was paid in the study period to Chicago-based Field Trip Factory, which offers schools free field trips to stores.[180] Students visit Petco to learn about animal welfare, Toys 'R' Us to learn about party planning, and grocery stores to learn about nutrition.[181] The stores, in turn, pay Field Trip Factory for the exposure and for coordinating the visits. A supermarket spokesperson in Massachusetts told *The Boston Globe* his firm paid $24,000 for a 12-week trial at 24 New England stores.[182] President and founder Susan Singer casts her firm's service as providing free educational opportunities and teaching students to be smarter consumers.[183] But at least one Petco manager was frank about the objective: "We are getting kids in at a young age so we can educate them and hopefully turn them into customers," said Indrani Mukherjee, general manager of a Buffalo, New York, Petco.[184] For H.E. Butt Grocery Co., based in San Antonio, Texas, Field Trip Factory tours are an opportunity to promote its private label children's food line, H-E-Buddy; the store also highlights General Mills and Colgate products during the tour, in return for sponsorship funds from those two corporations.[185]

Yet it is not clear that schools using Field Trip Factory are saving any money. They still must pay for the bus. Additionally, at least one Chicago museum spokesperson said that the museum does not charge admission for school field trips either.[186]

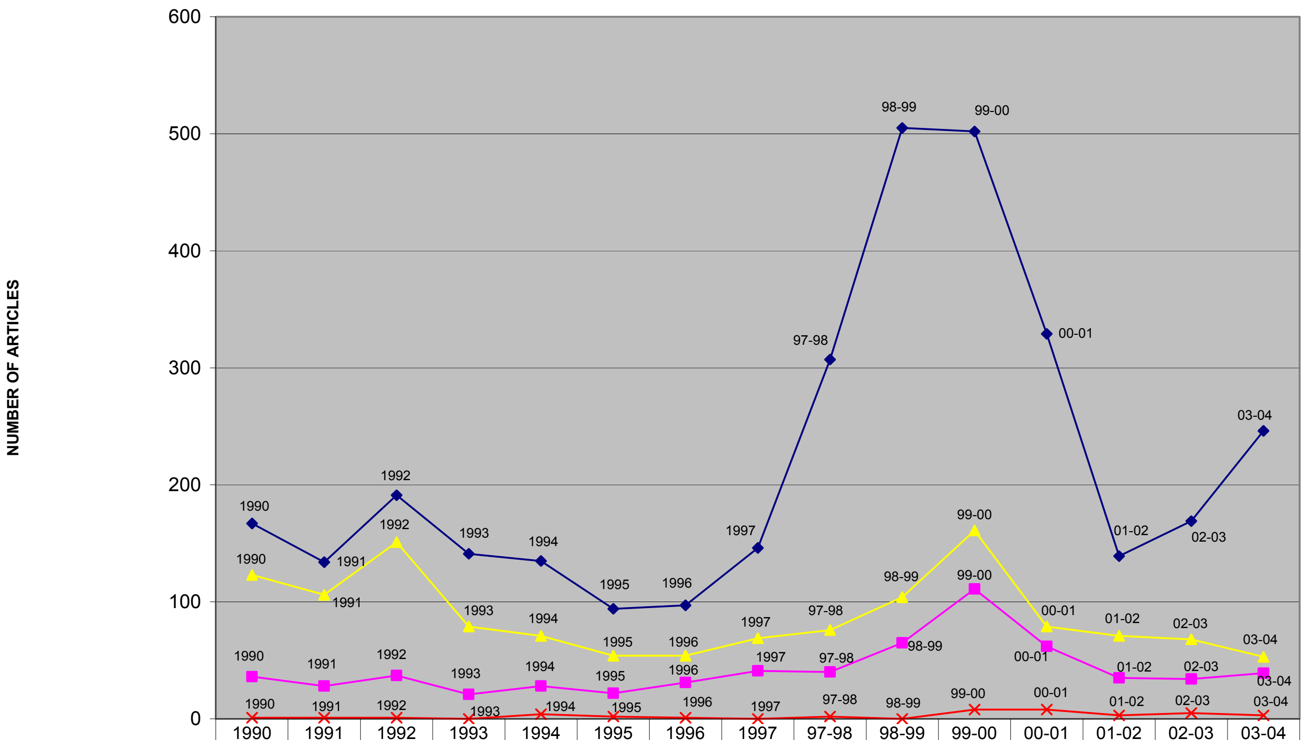
As it has received more attention, Field Trip Factory also has drawn more criticism. "The job of schools is not to groom pliant consumers," editorialized the *Philadelphia Inquirer*. "It is to imbue children first with a love of learning for its own sake, then with the skills needed for citizenship and career….Schools shouldn't set up their students to be exploited. If they do, parents must object."[187]

But Field Trip Factory is not alone. Cutting out the middleman, Toys 'R' Us has established its own program of organizing free field trips to its stores, rolling out the program initially in rural communities in Wisconsin, Mississippi, Texas, and North Carolina.[188] These are, observes Michael Rubin, the toy company's director of new business, "not places with a hundred museums. We're providing a destination that didn't exist before to provide an out-of-classroom experience."[189] From the company's vantage point, it is doing schools a favor and filling a gap. Others might wonder if, however, it is exploiting those schools' relative lack of resources; indeed, Rubin acknowledges, Toys 'R' Us hopes to gain a competitive advantage from the experience as well: "[W]e are learning about how people think."[190]

Category 6: Electronic Marketing

Electronic Marketing entails in-school marketing programs using broadcast, Internet, or related media. Overall, electronic marketing references showed a 24 percent increase, to 341 references in 2003-2004, compared with 276 in 2002-2003.

Figure 8: References to Electronic Marketing, 1990-2004, By Year and Type of Press



	1990	1991	1992	1993	1994	1995	1996	1997	97-98	98-99	99-00	00-01	01-02	02-03	03-04
Popular Press	167	134	191	141	135	94	97	146	307	505	502	329	139	169	246
Business Press	36	28	37	21	28	22	31	41	40	65	111	62	35	34	39
Ad/Mktg Press	123	106	151	79	71	54	54	69	76	104	161	79	71	68	53
Education Press	1	1	1	0	4	2	1	0	2	0	8	8	3	5	3

A leading source of references in this category is Channel One Network, owned by Primedia Corp. The firm distributes thousands of dollars worth of television equipment to schools under the condition that students be required to watch a daily, 12-minute news program, including two minutes of commercials. Channel One added to its usual daily news offerings a one-hour evening "Town Hall" broadcast with California Governor Gray Davis on August 20, 2003, amid the campaign to recall the governor.[191] The program has also toured various cities, giving students in communities around the country a first-hand view of how its broadcasts are prepared.[192]

Channel One continues to market itself to school districts. In Pennsylvania, the Palmerton Area School District near Allentown weighed last November whether to sign up with the service. Supporting it was librarian Amy Young who told school board members her own children became more informed on current events after their school became one of the first to sign with the network more than a decade before.[193] Channel One currently claims to reach about 8 million students in 370,000 classrooms in 12,000 schools.[194]

<u>A Channel One Case Study</u>

In Springfield, Missouri, reporter Susan Atteberry Smith examined the use of Channel One News in local schools and found wide-ranging opinions among students and teachers.[195] In one class, Smith noted, students' attention wandered considerably during the broadcast, "hardly transfixed" by a grim story about war in Iraq. Still, students and teachers told Smith they found the program "insightful" and "important," with one adding: "I'm not really complaining that we're missing Charles Dickens." Another student complained she'd missed Channel One that day "because her science teacher had to summarize the day's lesson." Even so, students and teachers did not really like the commercials, and Smith wrote that at least one teacher allowed students to talk during the breaks "because she doesn't believe students should be obligated to watch them." Indeed, several students she interviewed dismissed the commercials as irrelevant to their interests. Although some school officials told Smith that the program, despite its faults, was worth the trade-off, including equipment valued at about $12,000 per school, Smith wrote that some principals were mulling whether to drop the program in their schools in order to increase instruction time.[196]

In addition to opposition from such liberal organizations as The Green Party,[197] Channel One has drawn criticism from social conservatives. Josh Buice, in the *Atlanta Journal-Constitution* in July 2003, criticized the program for advertising "PG-13 movies packed with sexual innuendo, profanity and violence," and for enrolling as special co-hosts pop music stars whose lyrics use profanity or ridicule Christianity. "Channel One is not informing American students about current world affairs, but is instead purchasing their minds and calling it education."[198]

Cable in the Classroom

In addition to Channel One, the cable television industry gains access to schools in various ways. Cable in the Classroom makes the content of various cable TV networks available for free to schools. Some of its offerings appear to be little more than advertisements for cable networks' prime time offerings, such as a half-hour Cable in the Classroom "documentary" about a SciFi network miniseries, "Battlestar Galactica."[199]

The History Channel and cable provider Comcast announced a partnership with the Philadelphia school district to provide teacher training, classroom materials, and other support to "enhance history education in the city's schools."[200]

In another instance, Comcast stepped in to sponsor a tour by James McBride, the musician and author of the memoir *The Color of Water*, during McBride's visits to a dozen inner-city magnet schools in 12 Southeastern communities in October 2003. The company delivered McBride to his stops in a Comcast tour bus and gave him and his band members digital cameras to "document their life on the road."[201]

Individual cable providers offer additional in-school programs. For example, Time Warner Cable enlisted middle school students in a competition to create 30-second public service-style spots urging their peers to avoid drugs and violence. The same provider also sponsors "Kids Biz"—which a trade publication described as a program "to teach kids how to consume media by giving 30 schools a chance to produce a 15-minute prime time news show." Because Time Warner also is now an Internet provider using cable connections, the firm provides computers and Internet access at schools and recreational facilities that target low-income children.[202]

In a more arms-length relationship, Verizon Communications, a $67 billion (revenues) provider of both conventional and wireless telephone service, through its Verizon Foundation, provided $20,000 in grants for distance education programs in three Maine high schools. The grant was part of a total of $70 million given out by the foundation annually.[203]

<u>Computers and the Internet</u>

Computer equipment and Internet access are another key vehicle for electronic marketing in schools, and such programs are frequently justified by the supposed importance of giving students earlier exposure to advanced information technology. One of the most ambitious of such programs involves Microsoft and the Philadelphia school district. Taxpayers will pay $46 million for a so-called state-of-the-art high school, while Microsoft will provide software, services, and support staff.[204]

Even some corporate officials question the relationships that have formed between schools and marketers in the rush toward improved school technology: "Companies give large donations to help out with technology purchases or build buildings and then try to use that as a leverage point to sell their products throughout a school district," said Mike Lorian, vice president of education for Palm, the handheld computer manufacturer. [205]

And at least one study, published in October 2002 in *The Economic Journal*, a British publication, found no benefit in using computer assisted instruction used to teach mathematics. The study compared one group of Israeli 8th graders using computers for instruction and another group using more traditional methods. [206]

For many students, schools are a primary point of access to the Internet, and thus it is not surprising that some companies use the Internet to reach students. On April 22, 2003 (before the start of this year's study period), a dozen national consumer-protection groups filed a complaint with the Federal Trade Commission, charging Amazon.com with violating federal laws in collecting and disseminating children's personal information without parental review and consent. One of the filers of the complaint was the Center for Media Education in Washington, DC; the center's president, Kathryn Montgomery, pointed out that because schools were a key access point to the Web, "educators need to educate their students about their roles and rights as [online] consumers."[207]

Other Electronic Marketing Ventures

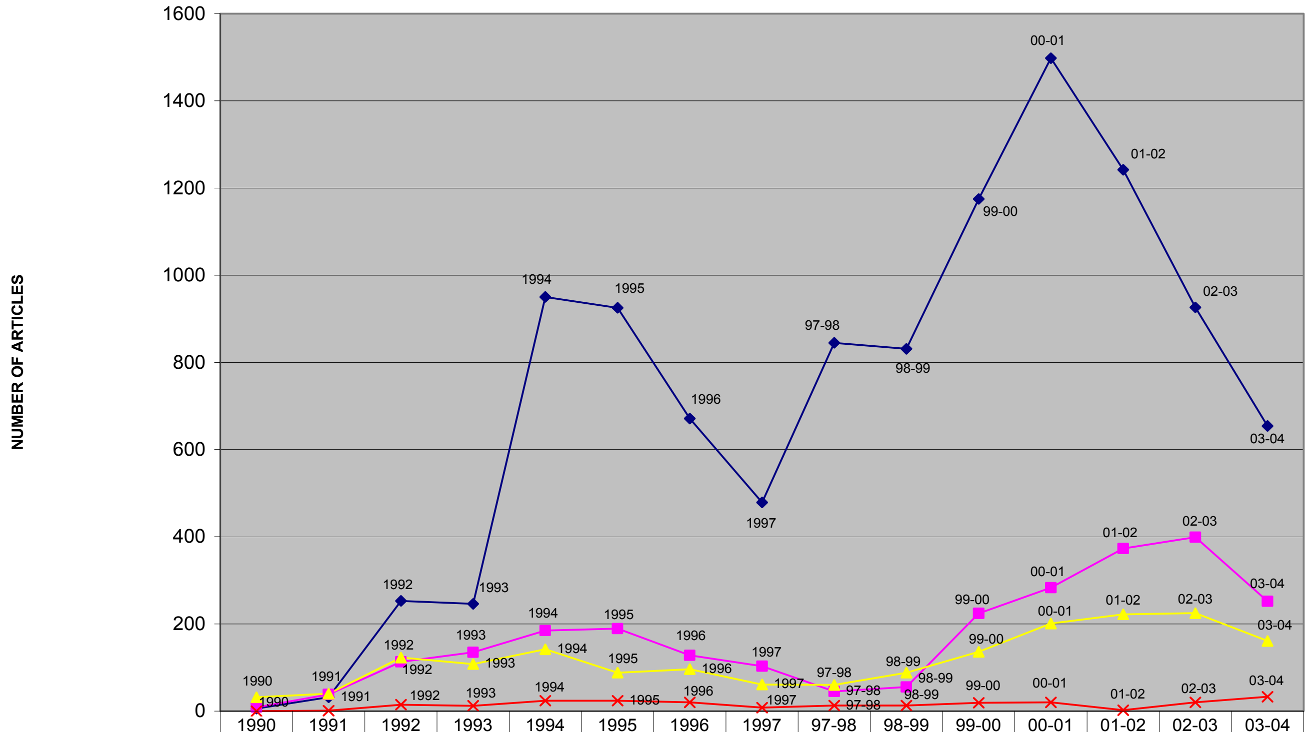
Entrepreneur Joe Shults sought to grow VTV (Varsity Television), an Internet-based video on-demand service that acquires programming made by high school students and shows it to viewers.[208]

Actiontec Electronics enlisted schools directly to help the firm market to families Internet monitoring software that would allow them to track children's online activity. For every one-year subscription to the online monitoring service (at a special rate of $30 per subscription) sold to parents, a school could receive $7.50—in effect, a commission.[209]

Category 7: Privatization

The category Privatization covers references to private management of public schools, of public charter schools, and other related topics. References in this category dipped 30 percent, to 1,100 in 2003-2004 from 1,570 in 2002-2003.

Figure 9: References to Privatization, 1990-2004, By Year and Type of Press



	1990	1991	1992	1993	1994	1995	1996	1997	97-98	98-99	99-00	00-01	01-02	02-03	03-04
Popular Press	6	32	253	246	950	925	671	479	845	831	1175	1498	1242	926	654
Business Press	9	38	113	135	185	189	128	103	45	55	224	283	373	399	252
Ad/Mktg Press	32	40	123	108	142	88	96	61	60	88	136	201	222	225	161
Education Press	0	1	15	12	24	24	20	8	13	13	19	20	2	20	33

Reasons for the decline are not entirely clear. In part it may reflect the fact that privatization as a public education strategy is less novel than it once was, and therefore has been deemed less worthy of coverage by news editors. Additionally, the sale of Edison from shareholders to private owners (including the State of Florida's pension investment agency) removed a recurring source of media references, Edison's quarterly financial reports to shareholders. Furthermore, with Edison now in its second year of managing its largest contract ever—running 20 Philadelphia public schools—scrutiny may have been less intense than in the previous year.

The period under study shows a privatized public education industry that is maturing and evolving. The evidence that it is maturing is widespread. Private education firms have formed a trade association and the industry as a whole is consolidating under a shrinking number of larger and larger players. Its evolution is reflected in one primary trend, the sharp increase in virtual schools—programs that combine distance education and home schooling, usually organized under a state's charter school laws, and nearly everywhere tied in with corporate entities that provide curriculum materials and some degree of organizational infrastructure.

The Maturing Private Education Industry

Although some had expected a significant expansion of voucher programs after the US Supreme Court's 2002 upholding of a voucher plan in place in Cleveland, Ohio, that hasn't happened. As of July 2004, only the state of Colorado had enacted a law allowing public money to pay for tuition at private and religious schools, and that law was ruled unconstitutional in June 2004.[210] (Milwaukee's voucher program also provides money for religious schools, but predates the Supreme Court ruling in the Cleveland case.)

Instead of voucher schools, the principal manifestation of privatization remains in the use of for-profit corporations to manage public charter schools. Many of the corporations also work in a separate line of business, managing regular public schools under contracts with school districts.

A New Privatization Lobby

Mounting criticism of the for-profit school management industry led six leaders in the industry to form their own trade group, The National Council of Education Providers (http://www.educationproviders.org), to lobby for more public money and for regulations friendlier to their industry.[211] "This is not a satanic plot to destroy public education," said Michael J. Connelly, CEO of Mosaica Education, a council member.[212] Other members include Charter Schools USA, Fort Lauderdale, Florida; Chancellor Beacon Academies, Coconut Grove, Florida; Edison Schools; National Heritage Academies, Grand Rapids, Michigan; and White Hat Management, Akron, Ohio.

As is often the case with lobbying organizations, day-to-day operations of the National Council of Education Providers are coordinated by a professional lobbying firm—in this case, The Allen Company, operated by Jeanne Allen.[213] Allen also founded and runs the Center for Education Reform, which has been a proponent of charter schools and which evaluates states on the basis of how strong or weak their regulation of charter schools is. States with less regulation are viewed more favorably in the center's evaluation scheme. Charter schools have become the statutory vehicles by which the for-profit education sector has expanded, and the Center's positions have arguably aided the industry in its quest for growth. In taking on the task of official lobbyist for the for-profit sector, Allen has completed the circle, tying herself, and therefore CER, to the financial success of the industry. For that reason her organization's assertions about the benefits of charter schools and for-profit charter management firms are clearly not the product of a disinterested outside civic group, but rather must be seen as serving the interests of her lobbying clients.

(Another CERU report, *Profiles of For-Profit Education Management Companies*, lists 51 education management companies, or EMOs, as of the 2003-2004 school year. The firms ran 463 public schools, enrolling more than 200,000 students in 28 states and the District of Columbia.)[214]

Other Signs of Industry Maturation

There were other signs of growth and maturation in the industry. Eduventures Inc., a Boston research firm, calculated that K-12 education business revenues grew 2.7 percent in 2003, to $50.1 million.[215] Meanwhile, the industry also showed signs of consolidating, with 34 mergers and acquisitions in the sector.[216]

Mature industries also tend to evolve to uncover new markets, and the for-profit education sector is no exception. Steven Pines, executive director of the Education Industry Assn., said that the NCLB law was creating profit opportunities for firms in supplemental education services (tutoring), assessment, and professional development.[217] Stanley Karp, writing in *Radical Teacher*, interprets the NCLB law as attempting "to channel students and funds toward for-profit education management companies and revive an ideologically-driven voucher movement that has been overwhelmingly defeated in every public referendum held so far."[218]

Edison Schools Inc.

Much of the privatization coverage, as it has in past years, focused on Edison Schools Inc., which in late 2003 reverted from being a publicly traded stock company to a privately held one. Edison founder Christopher Whittle announced on July 15, 2003, that he would buy out the firm at $1.76 a share, with Liberty Partners, a private equity firm, financing the transaction.[219] Liberty Partners is a New York City investment firm that manages the $1.8 billion (assets) Florida Retirement System. The transaction, valued at $174 million with the assumption of debt included, gave Liberty 96.3 percent of Edison—and it used Florida's retirement funds as its sole source of cash for the project. The transaction drew harsh criticism from teacher representatives in Florida: Edison's track record financially (losses of $354 million over 12 years) made it an unsound investment for employee retirement funds, critics argued, and while the company itself threatened the jobs of public employees.[220] Meanwhile, lawyers representing shareholders filed seven lawsuits, alleging the price was inadequate.[221]

Further reflecting the maturation of the industry as a whole, shortly before Whittle took the firm private, Edison announced a change in its strategy. It would move away from large-scale school management projects (as in Philadelphia) to managing public schools in medium-sized markets. In larger cities, Edison would focus on charter schools, Whittle said.[222]

While going private relieved Edison of the requirement to disclose its finances publicly, its contract with Philadelphia required it to continue providing quarterly and annual financial statements, and Edison spokesperson Adam Tucker said the company would continue to provide client schools and districts with information.[223]

Edison's practices may be driving some teachers away. In Springfield, Illinois, the company, operating the Feitshans-Edison school, was allowed to shorten its school year to 190 days from 200 and its school day to seven hours and 15 minutes from eight hours, after officials complained. The company blamed attendance drops in the summertime and attrition of teachers seeking jobs in districts with shorter hours and calendars—although both the longer day and year were touted by Edison as advantages to its approach when it sought and won the contract to manage Feitshans Elementary School.[224]

Edison continued to experience shifting fortunes in contracts. While some districts terminated contracts, others signed new ones. In South Carolina, the 43,700 student Charleston County district's school board approved a five-year, $11.1 million contract for Edison to manage nine low-performing schools, paying for the agreement with federal Title I money and state grants.[225] Edison contracts were renewed in Denver and Colorado Springs, Colorado,[226] Duluth, Minnesota,[227] and California.[228] In Long Island, New York, however, state investigators charged that the Edison-managed Riverhead Charter School in Calverton failed to provide special education students with legally mandated small classes and other required services.[229]

<u>Other Education Management Firms</u>

The nation's second-largest for-profit charter-school manager is Chancellor Beacon Academies, which managed 63 charter schools as of July 11, 2003.[230] It was acquired by Dennis Bakke through Bakke's Imagine Schools Inc., a start-up, in June 2004.[231] Yet Bakke's ambitious plan to spend $20 million on charter schools in South Carolina—to be matched by $20 million from Wachovia Corp.—appeared likely to founder when that state's legislature failed to pass a bill allowing the state's first charter school district before the legislature ended business for the year on June 4.[232]

Nobel Learning Communities Inc., based in West Chester, Pennsylvania, posted modest profits of 10 cents a share, or $969,000, on revenues of $40.6 million, for its third quarter that ended March 31, 2004.[233]

National Heritage Academies, based in Grand Rapids, Michigan, announced plans to open seven new charter schools in four states in the fall of 2003.[234] The firm ran into some problems, however. In Romulus, Michigan, two board members fired from a charter school operating under the auspices of Grand Valley State University and managed by National Heritage Academies said they planned to ask a judge to reinstate them to their board seats. They charged they were removed for raising questions about Heritage's management of the school.[235]

In San Marcos, Texas, the Mitchell Center Boys and Girls Clubs of South Central Texas and Charter Schools USA, based in Florida, were embroiled in litigation over what Charter Schools USA claimed was the Mitchell Center's failure to pay $264,000 for management services of the Mitchell Center's Texas Preparatory School, a charter school.[236]

White Hat Management Inc., based in Ohio, expanded to other states, opening charter high schools in Colorado[237] and Florida.[238]

The Schenectady, New York, school district sued Sabis International Systems, for-profit manager of the International Charter School of Schenectady, to terminate a lease in a dispute over construction of temporary classrooms. In explaining the lawsuit, Superintendent John Falco said Sabis's decision to proceed with the construction without permission from the district was part of a long pattern of problems the district had had with the EMO.[239]

Sabis had trouble elsewhere. In Greensboro, North Carolina, it declined to renew its contract to run Guilford Charter School, saying it had lost money and saw no opportunity to turn a profit. The school's directors contracted with a new firm, Imagine Schools of Arlington, Virginia, to manage the charter.[240]

<u>Indirect Vouchers Via Scholarship Tax Deductions</u>

In Florida, a variation on voucher programs offered corporations dollar-for-dollar state tax breaks for donating money to fund scholarships that could be used to send poor children to private schools. In the face of rising demands for greater accountability, supporters of the plan insisted that parents already demand accountability and that private schools should not be "saddled with the same rules as public schools."[241]

<u>The Rise of Virtual Charter Schools</u>

Another increasingly robust trend, and one widely followed, is the development of "virtual charter schools"—arrangements that enable students to study from home using curriculum materials obtained via the World Wide Web. Under state charter school laws, curriculum providers, families, or both qualify for state aid money by participating in the program.

Florida legislators passed a bill that would finance the Florida Virtual School, a state-run, on-line school, as the state would finance any school district, but with one difference: the school would only get paid for students who passed its courses.[242] A letter writer to *Education Week* spotlighted the danger of such a scheme in the for-profit arena: if schools intending to make a profit would not receive funding unless students pass, asked Jeff Lane, "how many cyber school students do we think will actually fail to pass the courses offered by these schools?"[243]

<u>Virtual Charters and K12 Inc.</u>

The single firm most frequently cited in news stories about virtual charter schools is K12 Inc., a company founded by William Bennett, former education secretary under President George H.W. Bush. K12 Inc. is a provider of Web-based curriculum materials marketed for home schoolers. It has aggressively pursued—and benefited from—passage of virtual school legislation. Although the company has enrolled about 2,000 home schoolers directly, its principal business strategy entails forming partnerships with public schools and then being paid with state funds under charter or on-line education laws.[244]

K12 Inc. is backed by a $20 million investment from a group led by Constellation Ventures, and has backing as well from Knowledge Universe, an education investment operation run by former junk bond king Michael Milken.[245]

Despite, or perhaps because of, its aggressive growth, K12 Inc. has found itself under fire. On October 9, 2003, Minnesota's largest teachers union challenged the legality of state funding for an on-line school operated by the small, rural, Houston, Minnesota, school district using the K12 Inc. curriculum. Education Minnesota alleged in its lawsuit that the program failed to provide adequate supervision by state-certified teachers, in violation of Minnesota law.[246] Co-plaintiffs included two Minneapolis-area school districts who argued that state funding of Houston's program threatened their own on-line school plans.[247] A lawsuit filed Jan. 7, 2004, by the Wisconsin Education Association Council similarly challenged the legality of the Wisconsin Virtual Academy, an on-line school run by K12 in partnership with the Northern Ozaukee (WI) school district.[248] That suit challenged the district's enrollment of students from outside its boundaries in the program, and the use of non-licensed instructors such as the students' parents. The union alleged that the academy would receive $5,500 for each of 420 students, or $2.3 million.[249]

Political Muscle in Idaho

In Idaho, when a Republican state senator, Gary Schroeder, launched an investigation into K12 Inc. and the Idaho Virtual Academy, he found himself under attack by a pro-K12 political action group, Idahoans for Tax Reform. Schroeder charged the group with conducting misleading and distorting "polls" of voters to suppress votes for him in an upcoming election. The state senator charged that K12 Inc. had bullied the legislature into paying out an additional $1.6 million for the virtual charter by threatening to close it, and that he was targeted for defeat because of his role as chairman of the state Senate Education Committee.[250] Meanwhile, Idaho's board of education came under fire for an agreement with K12 that kept its profit margins secret, despite its being paid with state tax dollars.[251]

K12 Inc. is not the only player in virtual charter schools. Chancellor Beacon Academy formed a partnership with Connections Academy Inc. (a unit of Educate Inc., which also owns Sylvan Learning Centers) to operate Chancellor Arizona Connections Academy (CA2) to operate one of five so-called schools without walls. CA2 was touted as using certified teachers, "community experiences" and technology to teach children needing "an individualized approach to education."[252] Students enrolled would study at home and "attend" classes via a home computer.[253]

For-Profit Schools and Performance Questions

A recurring criticism of privatization proposals has been that for-profit companies will inevitably be forced, sooner or later, to sacrifice the interests of students in order to meet their obligations to maximize profits for shareholders. That theoretical concern raised its head in reality in Philadelphia, where Victory Schools eliminated librarians in the five public schools the for-profit management company was hired to run. The company has similarly eliminated librarians in four other schools it operates in New York and Baltimore. The company told *School Library Journal* it had used its limited resources to reduce class size, train teachers, and build new "multimedia centers" equipped with computers, new furniture, and on-line service. Yet, the *Journal* reported, the company took the action despite studies showing "that well-staffed, equipped, and funded school libraries are directly related to student performance."[254]

Another running concern is whether for-profit companies perform any better than the public school systems with which they compete.

In its May 18, 2004 press release, Edison asserted that test score gains at its Michigan schools were "six times greater" than average annual local and state gains, but did not offer direct comparisons between comparable schools.[255] In Clark County, Nevada, a site of friction in the past between Edison and some public officials, the six elementary schools the company manages showed improvement in standardized test scores. Reading, language and science test scores were nearly the same as those of 24 comparison elementary schools, but math scores climbed at least six percentage points for each grade.[256]

The most definitive analysis to date may be a GAO report issued in November 2003, however, and it produced mixed results. Using standardized test scores and other data from a sample of 14 privately managed schools and 28 traditional schools, the report "Public Schools: Comparison of Achievement Results for Students Attending Privately Managed and Traditional Schools in Six Cities" concluded that privately managed schools in some cities performed better than their public counterparts, and in other cities worse.[257]

A scholarly article comparing the results of a public school summer reading enrichment program, another such program run by an unidentified for-profit firm, and no intervention, found that both the public and for-profit programs improved reading achievement, and that there was no significant difference in the outcomes of the two programs.[258]

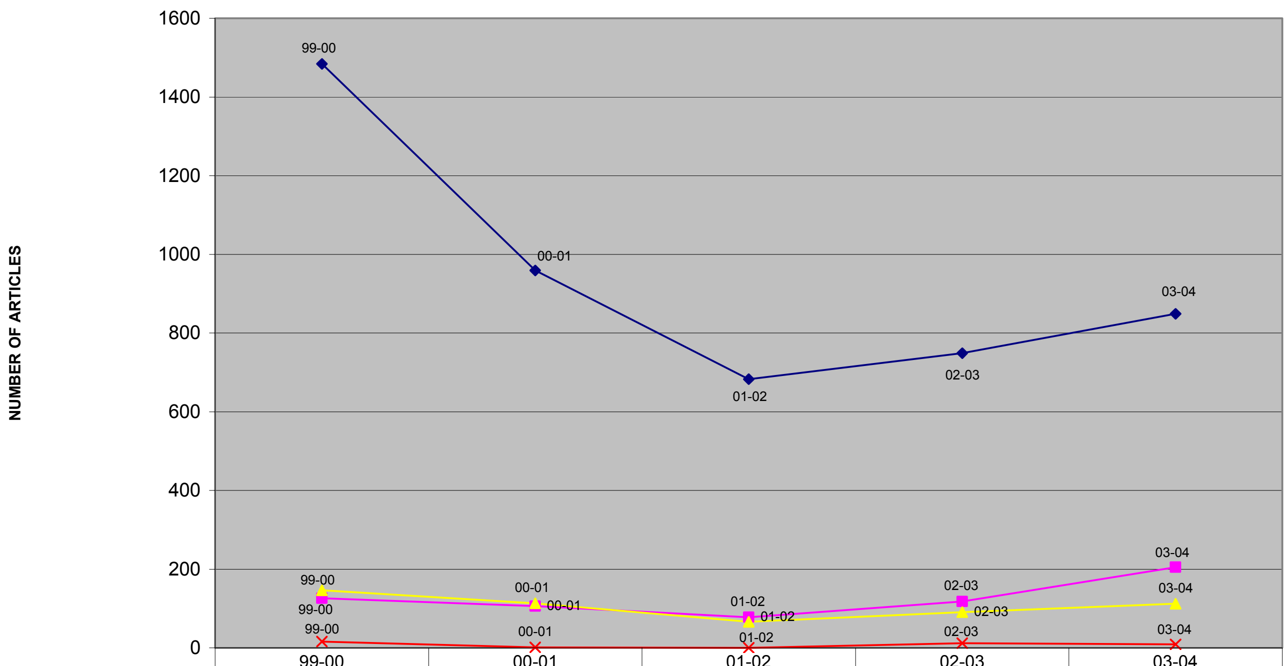
Mixed Signals from Federal Authorities

A 2003 US Education Department inspector general's audit of the Arizona Education Department concluded that the state agency improperly gave more than $1.1 million in federal money to charter schools run by for-profit companies, and recommended requiring the state to repay the funds. State education secretary Tom Horne objected to the audit's conclusions, contending that all charter schools were "public schools" by definition and therefore qualified for the funds. Horne said he would appeal the audit's findings.[259] (A review of the state and federal education departments' web sites in August 2004 indicated no new developments in the dispute.) Despite the restrictive federal stance toward for-profit education reflected in that incident, however, the Bush administration was accused of pushing education privatization while underfunding NCLB. On November 18, 2003, the advocacy group People for the American Way issued a report called "Funding a Movement: US Department of Education Pours Millions into Groups Advocating School Vouchers and Education Privatization." It cited a total of $77 million awarded over three years in the form of grants to organizations including K12 Inc., the pro-voucher Black Alliance for Educational Options, and the Center for Education Reform, among others.[260]

Category 8: Fundraising

Fundraising showed a 21 percent increase in 2003-2004 over 2002-2003, to 1,175 references from 970. As in past years, coverage drew attention to increased dependence on outside fundraising to cover operational costs, not just extracurricular expenses. Several references noted that wealthier communities were generally more active and successful in raising funds for their schools—perpetuating inequities of wealth and poverty.[261]

Figure 10: References to Fundraising, 1990-2004, By Year and Type of Press



	99-00	00-01	01-02	02-03	03-04
Popular Press	1484	959	683	749	849
Business Press	126	106	78	118	205
Ad/Mktg Press	146	113	66	91	112
Education Press	16	1	0	12	9

Fundraising includes direct product sales that return some percentage of revenues to the school or to its parent-teacher organization. It also includes a variety of rewards programs, in which consumers are encouraged to purchase certain products or make purchases from certain retailers in order to obtain donations for a designated school.

Rewarding Consumers

Campbell's Labels for Education—now in its 30th year—and General Mills' Box Tops for Education are the two mostly widely known rewards programs, and schools readily encourage parents and neighbors to purchase the companies' products so that the appropriate labels or box tops can be collected in order to be redeemed for rewards.[262, 263] Grocery stores such as Giant Eagle use customer loyalty cards as a vehicle for recording purchase amounts and awarding to designated schools a percentage of the customer's purchases.[264] Some school districts, such as one in McKinney, Texas, have signed agreements with credit card agencies to issue affinity cards that reward the school district when card holders charge purchases.[265] Target Corp.'s "Take Charge of Education" program donates one percent of sales to the school of the shopper's choice when charged to the company's Visa card or Guest card.[266] Indeed, rewarding charities on behalf of consumers appears to some to be a business opportunity: LoyaltyPoint Inc. is a for-profit holding company that "markets online, store and catalog-based loyalty programs that generate contributions to schools, nonprofits and other organizations, based upon parent and supporter purchases."[267]

Fundraising for Corporate Recognition

Hooters restaurants, best known for employing waitresses in tight-fitting tank tops and gym shorts, provides gift certificates for school fundraisers and donates food for sports teams, thus helping to ensure that the culture continues to yoke sex and sports for a new generation.[268]

Adopt-a-Class programs offered by Parent Teacher Association chapters in various communities recognize businesses in return for donations of money to buy learning materials. Meanwhile, a newer form of fundraising involves programs in which inkjet cartridges, cellular phones, and other hard-to-dispose of items are turned into schools, who then turn them over to recycling businesses for cash.

Fundraising for Basics, not Just Extras

Several publications reported that fundraising increasingly is no longer just for extra-curricular activities such as bands, drama clubs or sports teams.[269] A poll of parents for the National Parent Teacher Association found that in fully 68 percent of schools that conducted fund-raising used proceeds to pay for "such basic needs as classroom equipment, textbooks, and school supplies," and half of the parents polled said the money was being used to pay for "items normally covered by state funding."[270] Interestingly, the poll itself was co-sponsored by QSP Reader's Digest, which conducts fundraising magazine sales in schools.[271]

Reaction

Criticism of school commercialism, especially of sales of soft drinks in schools, continued to mount—and its purveyors' responses have ranged from retreat to counterattack.

In July 2003, Kraft Foods, the nation's largest marketer of processed food products, announced that it would stop marketing in schools and reformulate products to improve their nutritional content.[272] In early 2004, the American Academy of Pediatrics released a policy calling for an end to soft drink sales in schools and the creation of school nutrition advisory councils.[273] The academy's statement prompted extensive media coverage, as documented in this year's CERU survey.

Weighing in more broadly on the subject, not just of soft drink sales, but also naming rights and school bus ads, CBS News radio commentator Dave Ross observed sarcastically: "I give you education's true purpose in two words: brand loyalty."[274] An editorialist for the *Morning Call* in Allentown, Pennsylvania, drew the contrast between schools struggling for funds and the Pentagon's budget: "Somehow we doubt we'll ever see the likes of the Microsoft Armored Division."[275]

<u>Schoolhouse Commercialism's Defenders</u>

Despite increasingly vocal opposition, however, commercialism in schools continues to produce decidedly mixed opinions, and at least a few defenders. An Edwardsville, Missouri, high school principal, Norm Bohnenstiehl, told the *St. Louis Post-Dispatch* there "haven't been any drawbacks" to a Coca-Cola pouring rights contract that paid for a new track, scoreboards, and auditorium improvements.[276] A Columbia, Missouri, parent and dietitian, Melinda Hemmelgarn, disagreed, arguing: "Schools should be commercial-free zones," while a high school student, noting the number of students who drank soda and ate chips in their first classes of the day, asserted: "Schools are pushing for students to adopt an unhealthy and addictive habit."[277]

An editorial writer for the *Tampa Tribune* in Florida approached the prospect of naming rights matter-of-factly. Noting that naming rights and school bus advertising are already a fact in other communities, the writer, William Yelverton, suggested that the Pasco, Florida, school district should follow suit. Dismissing concerns that such a move "sends a bad message, especially to youngsters—namely, that anything is for sale at the right price," Yelverton asserted it was merely a matter of being creative, "stepping outside the tradition [sic] box," and was preferable to "being forced to eliminate jobs, an entire department even…"[278]

His anonymous editorial-writing colleague at the *Arkansas Democrat-Gazette* in Little Rock disagreed, however. Writing about the decision of school officials in Harrison, Arkansas, to name their renovated football stadium for FedEx Freight in return for $1 million, the editorialist squirmed. Corporate sponsors at the school, the writer noted, adopt classrooms and

> … do things like provide classroom supplies and pay for special projects. Which sounds great. But in return, the kids spend time learning about the corporation. Which sounds less than great. Is the kids' time being traded for a corporate hand-out? Shouldn't class time be spent on more basic education—like math, science, English and history? Just what message are we sending the kids when we make deals like these?[279]

The editorial writer drew a distinction between naming rights for an individual benefactor and for a corporation and likened the latter to "a commercial trade-off" akin to advertising. "Which is fine in its place, but its place shouldn't be in the public schools. Or on their football stadiums. Some things money shouldn't be able to buy."[280]

International Concern over Schoolhouse Commercialism

Virtually every example of schoolhouse commercialism that surfaced in US media in this year's search could be found the media of some other country in the period under study. In New South Wales, Australia, it was reported that parent associations raise $35 million (Australian) annually above what government provides.[281] In Calgary, Alberta, Canada, controversy raged over the possibility of naming schools for corporate sponsors.[282] Similar displeasure was voiced by an editorialist in Nelson, New Zealand.[283] Meanwhile, in Saskatchewan, a 20-year-old newspaper columnist lamented the annual practice of enlisting students to sell entertainment books carrying discount coupons in order to raise funds for public schools, with a pizza party going to the classroom selling the most books: "There's a term for that: 'bribery.'"[284] The *Ottawa Citizen* editorialized against vending machines and exclusive soft drink agreements in schools: "These schools are responsible for the welfare of children: They should not treat those children as a captive market for a particular brand."[285]

International media references also showed that privatization is not strictly an American phenomenon. Edison Schools has begun moving into overseas ventures. In Great Britain, the company was contracted to provide "a package of curriculum development, homeschool partnerships and teacher training" to a high school in Essex, England, working with 12- to 14-year-old students.[286]

The Education Press

Another recurring development in this year's study has been the relatively minor attention paid by the Education Press to topics in schoolhouse commercialism, except in select categories. For the 2003-2004 study period, the Education Press accounted for 1 percent of the references logged, or 84 articles out of 5,658; for the entire 1990-2004 period, its share was again just one percent of the references logged.

Figure 11: References to Commercializing Categories: Education Press Compared to Other Three Presses, 2003-2004

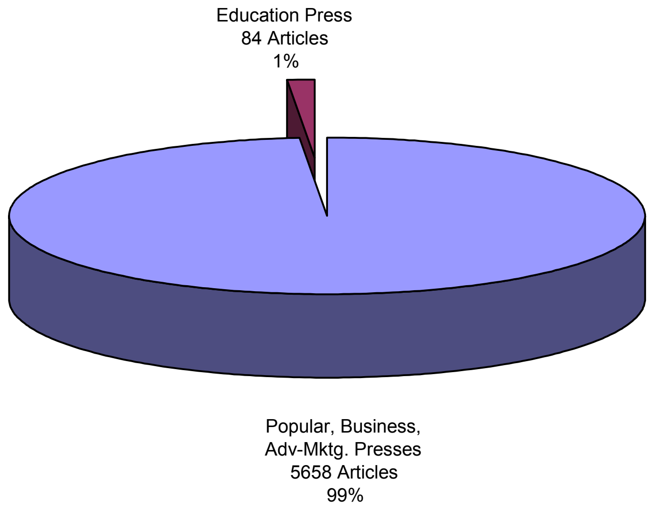
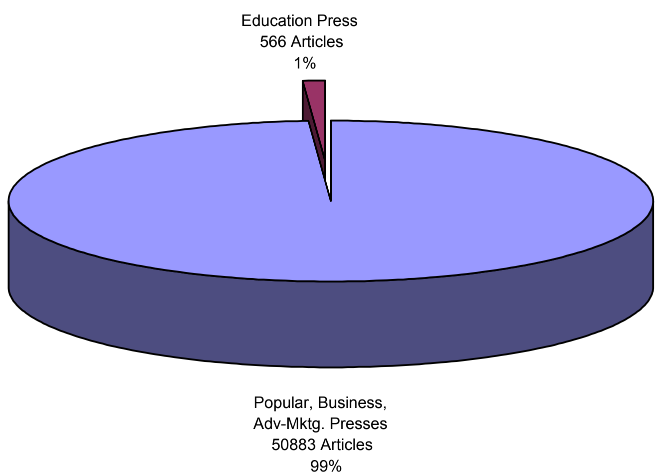


Figure 12: References to Commercializing Categories: Education Press Compared to Other Three Presses, 1990-2004



Education press coverage did spike in two specific categories: Privatization (33 references in 2003-04, compared with 20 in 2002-2003) and Exclusive Agreements (17 vs. 5). The higher number of privatization references likely reflects increasing attention paid by the education press to the private school and school-management industry. Interestingly, it runs counter to the trend in coverage of privatization by the other three presses, which declined in 2003-2004, as already noted in the section on Privatization.

Education publications have from time to time sought to examine the topic of schoolhouse commercialism more deeply. *Education Week* devoted several pages on November 5, 2003, to discuss what appeared to be conflicting signals from Coca-Cola Inc., which even as it vowed to stop marketing to children under the age of 12, rolled out "Swerve," an artificially flavored dairy drink (with nearly twice as much sugar in it as milk has) available only in schools, and entered a sponsorship agreement with the National PTA.[287]

The education press also covered in some depth developments surrounding school privatization, including the shifting fortunes of school-management companies such as Edison, and new trends such as the rise of virtual schools.[288]

Not all education press coverage is skeptical.[289] *Principal Leadership* in December 2003 published one high school principal's defense of relationships with companies like the retailer Target. "[L]ike other principals, I struggle to create quality programming that is inexpensive and student-focused," wrote Joseph Moylan, who heads Oconomowoc High School in Wisconsin. At his own school, Moylan wrote, "we have partnered with Target Corporation to offer our students a work experience that helps focus their academic life and shape their career selections"—and boosted Target's goodwill in the community as well.[290]

A more jaundiced view of corporate partnerships, however, was reflected in a scholarly article published in Teacher Education Quarterly by DePaul University professor Kenneth J. Saltman. Saltman pointed out the commercial motives underlying Coca-Cola's "First Book" promotion to distribute new books to needy children, and quoted CEO John Alm of Coca-Cola Enterprises, the soft drink marketer's national bottling affiliate: "The school system is where you build brand loyalty."[291] Coke and other corporate marketers, however, are not merely building loyalty to their brands, but also to a corporatist, consumerist, and individualist ideology that celebrates the status quo, Saltman argued. Such an approach, he contended, is in stark contrast to the idea of public education as a means to empower citizens who can wield the power of democracy to effect beneficial social change:

> Coca-Cola's and other corporate educational programs make freedom something you buy at the mall, or more conveniently inside or just outside the classroom, after selling your time to the highest bidder. Education for critical democracy makes individual freedom an ideal fulfilled through helping others to be free.[292]

Conclusion

What lies ahead? Proponents of increased business-school partnerships contend that corporate involvement in education benefits students. The National Association of Partners in Education—a business group founded to promote corporate-school relationships—claims research shows "improved achievement …[and] a reduction in

'Risk Behaviors' such as alcohol use and discipline problems" among students who are involved in "partnership activities" that involve businesses in the school.[293] The Harris Interactive/Kid Power Poll of Youth Marketers, conducted in February, 2004, found that 74 percent of professionals who market to young people expect to see in-school marketing increase—driven by schools' tighter budgets and need for new funding sources.[294] Among the 878 respondents in the online poll, who by their professional association might be expected to have a bias in favor of marketing activities in general, substantial majorities approved of corporate sponsorship of sports events (84%), loyalty-based fundraising programs like Boxtops for Education (83%), advertising in school papers (73%), and corporate logos on sports uniforms (65%). Yet these respondents were deeply divided on the question of how far is too far: Although 45 percent said youths could handle in-school advertising, 47 percent said that schools should be off-limits.[295]

Lurking behind the ready cash proffered by corporate marketing programs in schools are constant tests of integrity. For instance, according to a *Hartford Courant* report, a school district in Florida sought to get around a state law forbidding advertising on the outside of school buses by selling ads on the inside windows.[296]

In Utah, corporate sponsorship of a junior high school by McDonald's—which led to the flying of a corporate flag on the school premises—also has produced a free-speech challenge. In 1999, members of People for the Ethical Treatment of Animals (PETA) protested McDonald's by picketing at the school, and were arrested. A lower court upheld the arrests, citing a Utah law that forbade "interference with peaceful conduct of school activities." An appeals court in 2003, however, reinstated the protesters' First Amendment lawsuit against their arrests, holding that the state law in question did not address junior high schools, only colleges and universities.[297] A newspaper editorial writer who weighed in a few days later defended the arrests, however, apparently oblivious to the free-speech issues embedded in the case.[298]

Putting schools in malls presents similar free-speech conflicts, as Chris Berdik noted in his *Boston Globe* article. Berdik recounted how, while reporting on his story about the Lafayette Square Mall's Education Resource Center, security guards questioned his right to take notes on the mall grounds—which was, after all, private property. Berdik talked his way out of a confrontation, but suggests that the incident offered "unintended civics lessons that might await students just outside the ERC's doors."[299]

Defenders of schoolhouse commercialism argue that it is no more than a way for schools to get needed additional resources, and that businesses should be thanked for what they provide and encouraged to share more largesse. Yet events in Oregon bring into sharp relief the way business interests undermine schools even as they seek credit for their "contributions." On the one hand, a variety of the state's businesses, small and large, held drives to raise money for schools—drives that, not incidentally, were structured to promote their own sales: a car dealer gave $25 for every car sold, with a goal of $100,000; organic fruit purveyors donated 50 cents from every pound of fruit sold; and restaurants and at least one hair salon chain donated percentages of their sales as well. Yet the need for these donations was spurred because in part due to lobbying by business interests: school districts were blocked from raising local taxes and a statewide tax increase to aid schools was targeted for repeal.[300]

In January 2004, Americans United for Separation of Church and State, a lobbying group, published an article reporting on how evangelists have used school events to recruit potential religious converts. Speakers such as Southern Baptist minister Ronnie Hall offer free assemblies—in Hall's case, speaking against drug and alcohol abuse—which they then leverage as advertising for religious rallies outside the school. In Marion, Illinois, a father who believed that such tactics violated the First Amendment separation of church and state sued in Federal Court, and a judge signed off on a settlement in which Hall agreed to speak only on secular topics and was barred from distributing tickets to his evening religious rally.[301] Americans United for Separation of Church and State takes the following lesson from this and other such incidents: "School officials, teachers and parents should be aware that any group offering a free or near-free program to public schools may have an ulterior motive."[302]

Corporate interests may have far different motives than the saving of souls, but the task of examining motive is just as urgent in their case. Indeed, in an essay published on-line in June 2004, Calvin College philosopher James K. Smith drew a short line between the pursuit of instruction in religion and theology, on the one hand, and instruction in business, on the other. Smith was examining the U.S. Supreme Court ruling in *Locke* v. *Davey*, which permitted Washington State's Promise Scholarship Program to exclude students pursuing "a devotional theology degree," but otherwise permitted funding scholarships for students, even in religious institutions, pursuing secular professions. Smith wrote:

> It seems to me that the court's decision is a bit naive about the distinction between sacred and secular, between 'religious' and other vocations. … But isn't there a sense in which a business degree is also intended to induce a particular faith (in the market)? Isn't there something quite indoctrinating about many of the

> programs in business at state universities, which function as a kind of novitiate, orienting students to a set of doctrines and a new worldview? Indeed, one could suggest that much that goes under the banner of ‘secular’ education is, in fact, a kind of religious formation where students are initiated into a particular worldview—a set of commitments that govern how they see the world and act within it.[303]

Uncovering and scrutinizing the influence of corporations in public schools forces us, ultimately, to grapple with the question of what our schools are for. The American ideal of public education has historically been conceived as a means for preparing the next generation to participate fully in a free and democratic society—a role that requires responsible questioning of the status quo and of established power structures. The more corporate special interests are allowed to influence what schools teach—and, by extension, limit what they cannot teach—the less students are seen as active citizens-to-be and rather as passive consumers-to-be-sold, the farther our educational system moves from that ideal.

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APPENDIX A

Search Terms and Modifications for the 2003-2004 Trends Report:

Terms for Popular, Business, and Advertising/Marketing Presses in Lexis-Nexis

Search One: Sponsorship 2002-2003
((corporate sponsor!) or (school business relationship) or (sponsor! school activit! or sponsor! school program or sponsor! school event) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school)

Search Term Modifications 2003-2004
((corporate sponsor!) or (school business relationship) or (sponsor! school activit! or sponsor! school program or sponsor! school event) or (**corporate philanthropy**) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school)

Explanation: The term "corporate philanthropy" was added because it yielded several articles that discuss corporate sponsored activities in the schoolhouse.

Search Two: Exclusive Agreements 2002-2003
(DD Marketing) or (exclusive sale or exclusive contract or exclusive deal or exclusive agreement or exclusive partner! or exclusive pour! right or exclusive soft drink agreement or exclusive sneaker agreement or exclusive sport apparel agreement) or ((NIKE or Pepsi! or Coke or Dr. Pepper or Reeboks or Adidas) and (exclusive agreement)) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school)

Search Term Modifications 2003-2004
(DD Marketing) or (exclusive sale or exclusive contract or exclusive deal or exclusive agreement or exclusive partner! or exclusive pour! right or exclusive soft drink agreement or exclusive sneaker agreement or exclusive sport apparel agreement) or ((NIKE or Pepsi! or Coke or Dr. Pepper or **carbonated beverage** or **Snapple** or Reeboks or Adidas) and (exclusive agreement)) or (**school children nutrition**) or (**food advertising**) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school)

Explanation: The company "Snapple" has joined other beverage enterprises in contracting exclusive agreements with public schools. The term "carbonated beverage" has yielded articles that include information about business agreements between public schools and some beverage companies. The terms "school children nutrition" and "food advertising" were added because they yielded articles related to exclusive corporate marketing practices in the schoolhouse.

Search Three: Incentive Programs 2002-2003
(incentive program) or (Pizza Hut and Book It!) or (NBA's Read to Achieve) or (Verizon Reads) or (Papa John's Scholar) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school)

Search Term Modifications 2003-2004
(incentive program) or (**corporate and school incentive program**) or (**business and school incentive program**) or (Pizza Hut and Book It!) or (NBA's Read to Achieve) or (Verizon Reads) or (Papa John's Scholar) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school)

Explanation: The terms "corporate" and "business" plus "school incentive program" have been included to add scope in the identification of school incentive programs that are sponsored by businesses or corporations.

Search Four: Appropriation of Space 2002-2003
(CAPS (Cover w/1 Concepts) or CAPS (School Marketing Partners) or CAPS (Planet Report) or (naming right) or (advertis! W/3 (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school) and not (position or job or vacanc!))

Search Term Modifications 2003-2004
CAPS (Cover w/1 Concepts) or CAPS (School Marketing Partners) or (naming right) or (**school bus advertising**) or (**corporate and adopt a class**) or (**business and adopt a class**) or (advertis! W/3 (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school) and not (position or job or vacanc!))

Explanation: The term "Planet Report" has not generated a single relevant article for the last two years; thus, it has been excluded from this year's search terms. On the other hand, the terms "school bus advertising" and "corporate or business" plus "adopt a class" have yielded articles that discuss the use of school space by businesses and corporations; thus, these terms have been added to this year's search term template.

Search Five: Sponsored Educational Materials 2002-2003
(sponsor! education! material) or (sponsor! teaching aid) or (corporate sponsor! material) or (sponsor! curricul!) or (education kit) or (Lifetime Learning System) or (Scholastic Inc) or (Science Scope) or (Learning Enrichment Inc) or (Mazer Corp!) and (school or classroom)

Search Term Modifications 2003-2004
(sponsor! education! material) or (sponsor! teaching aid) or (corporate sponsor! material) or (sponsor! curricul!) or (education kit) or (Lifetime Learning System) or (Scholastic

Inc) or (Science Scope) or (Learning Enrichment Inc) or (Mazer Corp!) or (**Field Trip Factory**) and (school or classroom)

<u>Explanation</u>: The term "Field Trip Factory," part of the search terms for the fundraising category in the 2002-2003 report, has been moved to category five because when students visit businesses associated with this program, they receive corporate sponsored materials and/or supplies as part of the field trip experience.

Search Six: Electronic Marketing 2002-2003
(Channel One) or (Learning Network) or (Cable in Classroom) or (CIC) or (Ciconline) or (NCTA) or (National Cable & Telecommunications Association) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school)

Search Term Modifications 2003-2004
(Channel One) or (Learning Network) or (Cable in Classroom) or (CIC) or (Ciconline) or (NCTA) or (National Cable & Telecommunications Association) or (**Internet school marketing**) or (**Internet school advertising**) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school)

<u>Explanation</u>: The terms "Internet school marketing" and "Internet school advertising" have been added to expand the scope in the identification of school marketing and advertising practices conducted by businesses and corporations through the Internet.

Search Seven: Privatization 2002-2003
CAPS ((Beacon Education! Management) or (Charter Schools Administrative Services) or (Charter Schools USA) or (Designs for Learning) or (Edison Schools) or (Edison Project) or (Excel Education Centers) or (Helicon Associates) or (Leona Group) or (Mosaica Education) or (National Heritage Academies) or (SABIS Educational Systems) or (White Hat Management) or (Nobel Learning Communit!) or (Chancellor Academies) or (Chancellor Beacon Academies) or (Educational Services Inc) or (Ideabank Inc) or (Ombudsman Educational Services Ltd) or (Pinnacle Education Inc) or (Smart Schools) or (Victory Schools Inc) or (ODELHA Academy) or (K12 Inc) or (Sequoia Choice LLP) or (Class.com Inc) or (Apex Learning Inc))

Search Term Modifications 2003-2004
CAPS (Charter School Administrative Services) or (Charter Schools USA) or (Designs for Learning) or (Edison Schools) or (Edison Project) or (Excel Education Centers) or (Helicon Associates) or (Leona Group) or (Mosaica Education) or (National Heritage Academ!) or (SABIS Educational Systems) or (White Hat Management) or (Nobel Learning Communit!) or (Chancellor Beacon Academies) or (Ideabanc) or (Ombudsman Educational Services) or (Pinnacle Education) or (Smart Schools) or (Victory Schools) or (K12 Inc) or (Sequoia Charter School)

<u>Explanation</u>: Search terms in this category include only Education Management

Organizations (EMOs) that manage four or more schools as published in the Profiles of For-Profit Education Management Companies Fifth Annual Report by the Commercialism in Education Research Unit (CERU) http://www.asu.edu/educ/epsl/CERU/Documents/EPSL-0301-102-CERU.pdf. Beacon Education Management and Chancellor Academies merged into Chancellor Beacon Academies. ODELHA Academy is now part of White Hat Management and Class.com and Apex Learning are not EMOs.

Search Eight: Fundraising 2002-2003
(Apples for the Students) or (Campbell's Labels for Education) or (Campbell Soup Labels) or (Box Tops for Education) or (Box Tops) or (Schoolpop.com) or (eScrips) or (School Cash) or (Field Trip Factory) or (Funding Factory) or (Beautycares) or (Tyson Project A+) or (Kmart's School Spirit Program) or (Take Charge of Education) or ((grocery or supermarket or food store or cash register receipt and redeem) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school)) or (school fundrais!)

Search Term Modifications 2003-2004
(Apples for the Students) or (Campbell's Labels for Education) or (Campbell Soup Labels) or (Box Tops for Education) or (Box Tops) or (Schoolpop.com) or (eScrips) or (School Cash) or (Funding Factory) or (Beautycares) or (Tyson Project A+) or (Kmart's School Spirit Program) or (Take Charge of Education) or (**Great American Opportunities**) or (**Sally Foster**) or (**Cash for Cans**) or (**Giant Eagle**) or (**Upromise**) or (**School House Jam**) or (**Schoolpop Visa**) or (**Giftco**) or (**Artware By You**) or (**IFS of New Jersey**) or (**Kathryn Beich**) or (**Namebeads**) or (**Fieldhouse Store**) or (**Ready Fund Raising**) or ((grocery or supermarket or food store or cash register receipt and redeem) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school)) or (school fundrais!)

<u>Explanation</u>: In the 2003-2004 report, fourteen school fundraising programs with regional or national focus were identified and added to the list of search terms for this category.

APPENDIX B

Search Terms and Modifications for the 2003-2004 Trends Report:

Terms for Education Press in H.W. Wilson Education Index Database

Search One: Sponsored Activities 2002-2003
((School Properties Inc) or (corporate sponsored) or (corporate sponsorship)) not (college* or universit*) and (py=xxxx)

Search Term Modifications 2003-2004
((School Properties Inc) or (corporate sponsored) or (corporate sponsorship) or (**corporate philanthropy**)) not (higher education or college* or universit*) and (py=xxxx)

Explanation: The term "corporate philanthropy" was added because it is an index term in the Education Index database that depicts articles related to corporate sponsored activities in the schoolhouse.

Search Two: Exclusive Agreements 2002-2003
((sneaker* or Reebok or Nike or Adidas or athletic wear or athletic apparel or sports wear or sports apparel) and school*) not (college* or universit*)) and (py=xxxx)
and
((Coca Cola Company) or (PepsiCo Inc) or (business and sports) or (beverage industry) not (college* or universit*)) and (py=xxxx)

Search Term Modifications 2003-2004
((sneaker* or Reebok or Nike or Adidas or athletic wear or athletic apparel or sports wear or sports apparel) and school*)) or (**school-children-nutrition**) or (**food-advertising**) not (higher education or college* or universit*) and (py=xxxx)
and
((Coca Cola Company) or (PepsiCo Inc) or (**Snapples**) or (business and sports) or (beverage industry) not (higher education or college* or universit*)) and (py=xxxx)

Explanation: The terms "school-children-nutrition" and "food-advertising" are part of the index terms in the education database that yield articles related to corporate marketing practices in the schoolhouse.

Search Three: Incentive Programs 2002-2003
((incentive program*) or (Pizza Hut and Book It!)) and (py=xxxx)

Search Term Modifications 2003-2004
((incentive program*) or (Pizza Hut and Book It!) or **Bookit**)) and (py=xxxx)

<u>Explanation</u>: During the searches in the Education Index database, the term "Bookit" yielded one article relevant to this category; therefore, a slight modification of the name of this reading program was added to the search terms.

Search Four: Appropriation of Space 2002-2003
((Cover Concepts) or (School Marketing Partners) or (Planet Report) or (advertis* and school*) not (Channel One)) and (py=xxxx)
and
(propaganda and school*) and (py=xxxx)

Search Term Modifications 2003-2004
((Cover Concepts) or (**Primedia**) (School Marketing Partners) or (advertis* and school*) not (Channel One)) and (py=xxxx)
and
(propaganda and school*) or (**Business-and-sports**) or (**logos-symbols and school***) not (higher education or college* or universit*) and (py=xxxx)

<u>Explanation</u>: "Primedia" was added to the search terms because this is the name of the company that owns Cover Concepts – the business that distributes sponsored lunch menus, book covers, etc. to schools. The terms "business-and-sports" and "logos-symbols" are index terms in the Education Index database that yield articles related to how corporate sponsors use school space to advertise their products.

Search Five: Sponsored Educational Materials 2002-2003
((sponsored education* material* or sponsored teaching aid*) or (sponsored lesson* or sponsored curricul*)) and (py=xxxx)

Search Term Modifications 2003-2004
((sponsored education* material* or sponsored teaching aid*) or (**sponsored-teaching-aids**) or (sponsored lesson* or sponsored curricul*)) and (py=xxxx)

<u>Explanation</u>: "Sponsored-teaching-aids" is part of the index terms in the Education Index database; thus it was included in this year's search terms to access more articles that discuss sponsorship of teaching materials by business and corporations.

Search Six: Electronic Marketing 2002-2003
((Channel One or YNN or Youth News Network or Family Education Network or ZapMe or Star Broadcasting)) and (py=xxxx)

Search Term Modifications 2003-2004
((Channel One or YNN or Youth News Network or Family Education Network)) and (py=xxxx)
and
(Internet marketing or internet advertising) and school* not (higher education or college* or universit*) and (py=xxxx)

<u>Explanation</u>: "ZapMe" went out of business a couple of years ago and "Star Broadcasting" has not yielded any article relevant to this category for the last two years; therefore, both terms were excluded from the search term template for the 2003-3004 searches. The terms "internet marketing" and "internet advertising" plus "school" were included to expand the scope in the identification of school marketing and advertising practices conducted by businesses and corporations through the internet.

Search Seven: Privatization 2002-2003
((Advantage Schools) or (Beacon Education Management) or (Charter Schools Administrative Services) or (Charter Schools USA) or (Crawford First Education) or (Designs for Learning) or (Edison Schools) or (Edison Project) or (Excel Education Center) or (Helicon Associates) or (Leona Group) or (Mosaica Education) or (National Heritage Academies) or (SABIS Educational Systems) or (Tesseract Group) or (White Hat Management)) and (py=xxxx)

Search Term Modifications 2003-2004
((Charter Schools Administrative Services) or (Charter Schools USA) or (Designs for Learning) or (Edison Schools) or (Edison Project) or (Excel Education Center) or (Helicon Associates) or (Leona Group) or (Mosaica Education) or (National Heritage Academies) or (SABIS Educational Systems) or (White Hat Management) or (Nobel Learning Communities) or (**Chancellor Beacon Academies**) or (**Ideabanc**) or (Ombudsman Educational Services) or (Pinnacle Education) or (**Smart Schools**) or (**Victory Schools**) or (**K12 Inc**) or (**Sequoia Charter School**)) and (py=xxxx)
and
(public-school-privatization) and (py=xxxx)

<u>Explanation</u>: Search terms in this category include only Education Management Organizations (EMOs) that manage four or more schools as published in the Profiles of For-Profit Education Management Companies Sixth Annual Report by the Commercialism in Education Research Unit (CERU) http://www.asu.edu/educ/epsl/CERU/Documents/EPSL-0402-101-CERU.pdf. The term "public-school-privatization" is part of the index terms in the Education Index database.

Search Eight: Fundraising 2002-2003
((Apples for the Students) or (Campbell's Labels for Education) or (Box Tops for Education) or (grocery or supermarket or food store or cash register receipt and redeem*) or (School* fundrais!)) and (py=xxxx)
and
(money raising campaign*) and (py=xxxx)

Search Term Modifications 2003-2004
((Campbell's Labels for Education) or (Box Tops for Education) or (grocery or supermarket or food store or cash register receipt and redeem*) or (School* fundrais!) or (school **fund-raising**)) and (py=xxxx)

and
(money raising campaign*) or (**business-and-education-funding**) not (higher education or college* or universit*) and (py=xxxx)

Explanation: "fund-raising" and "business-and-education-funding" are also part of the index terms in the Education Index database.

APPENDIX C

Search Terms for the 2003-2004 Trends Report:

Terms for Popular Press in Google News

Searching Popular Press news articles in Google News was added to this year's searches.

Search One: Sponsorship 2003-2004
Corporate sponsorship and school
School business relationship
School commercialism
School sponsorship

Search Two: Exclusive Agreements 2003-2004
Carbonated beverage
School children nutrition
Soft drink and school
Exclusive contracts and school

Search Three: Incentive Programs 2003-2004
Pizza Hut Book It!
Corporate incentive program

Search Four: Appropriation of Space 2003-2004
School space appropriation
Corporate logo school
School bus advertising

Search Five: Sponsored Educational Materials 2003-2004
School and sponsored materials
School and sponsored supplies
Sponsored educational material
Corporate sponsored material
Field Trip Factory
Corporate sponsored teaching aid
Corporate sponsored curriculum

Search Six: Electronic Marketing 2003-2004
Channel one
Electronic marketing and school
Internet and school marketing
Internet and school advertising

Search Seven: Privatization 2003-2004
School privatization
Education Management Organization
Edison schools
K-12 Inc

Search Eight: Fundraising 2003-2004
School fundraising
Corporate school fundraising