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An Institutional Theory Analysis of Charter Schools: Addressing Institutional Challenges to Scale

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This article presents a conceptual framework derived from institutional theory in sociology that offers two competing policy contexts in which charter schools operate—a bureaucratic frame versus a decentralized frame. An analysis of evolving charter school types based on three underlying theories of action is considered. As charter school leaders pursue new and different forms of schooling, they are challenged by well-established bureaucratic rules and norms that define what it means to be a legitimate school. Microlevel institution-building efforts, however, may represent viable alternatives to the institutional order of public education as charter school leaders attempt to achieve scale.

This article presents a conceptual frame rooted in new institutional theory that aims to discover the challenges of creating, sustaining, and expanding charter school organizations as they evolve within the wider institutional environment of public schools. The utility of institutional theory as a lens for studying charter school reform lies in its ability to explain the complex relationship between decentralized schools and their environments. Institutional theory emphasizes the influence that an organization's cultural environment has on organizational structure and behavior, and it seeks to understand the ways in which cultural rules from the environment shape or constrain organizational action (Scott, 2003).

In the context of schools, institutional theory explains how school organizations are responsive to the demands of their institutional environment, largely because their formal structure is “loosely coupled” from their technical activities—specifically, there is a lack of coordination and control over the technical processes linked to classroom instruction (J. W. Meyer & Rowan, 1977, 1978; J. W. Meyer, Scott, & Deal, 1983). Institutional theory thus challenges rational conceptions of organizations as internally goal driven and technically efficient. Instead, institutional theorists argue that legitimacy is derived from conformity to the normatively held rules and scripts of the institutional environment, rather than instructional effectiveness; for schools, organizational success thus depends on factors other than technical efficiency (J. W. Meyer et al., 1983).

Presumably, the decentralized and autonomous nature of charter schools allows them to operate free from bureaucratic controls to challenge and redefine institutional classifications.¹ Yet ironically, the challenge for charter schools to create new definitions of schooling may be nearly insurmountable, considering that the very institutionalized scripts that have resulted from bureaucratic controls are those that in the wider institutional environment define both effective and legitimate schooling. In essence, as charter schools evolve, not only are they challenging the tenets of the institutional environment which they are part of, but their evolution and the development of new alternative forms of schooling is challenged by the rules, norms, and scripts of the more established and robust institutional environment that has come to define and dominate legitimate forms of schooling. Whether charter schools can in fact overcome these institutional challenges to pursue new and alternative models of schooling remains to be seen.

Absent from existing research are studies that examine the challenges and constraints that decentralized school organizations face when evolving within the wider institutional environment of public schooling and the efforts by charter organizations to overcome them. Although charter schools are granted autonomy from many regulations that govern traditional public schools, they are not evolving within a decentralized policy vacuum that insulates them from the forces of the wider institutional environment. Rather, charter schools are still subject to normative definitions of effective schooling advanced by the institutional environment.

The conceptual framework presented in this article aims to fill this void in the research by assisting us in both predicting and identifying challenges that decentralized schools will confront while evolving in the wider context of an institutional environment. The framework is grounded in the following empirical question: Will charter schools increase their prospects of organizational survival by organizing around the tasks of technical production, as opposed to responding to the institutionalized rituals that define legitimate schooling in the institutional environment? The framework presents two competing conceptual contexts in which charter schools operate—a bureaucratic frame versus a decentralized frame (Huerta, 2007; Huerta & Zuckerman, 2007). On one hand, charter schools are decentralized from bureaucratic oversight so that they may focus on their internal technical goals and local accountability demands (decentralized frame), but on the other hand, charter school organizations are evolving within a robust institutional environment that expects conformity to normative institutional definitions of schooling (bureaucratic frame). Although charter schools, in theory, should be free to pursue new and different forms of schooling that challenge long-standing institutionalized patterns of teaching and learning, they are at the same time constrained by taken-for-granted institutional rules that have come to define legitimate schooling in the United States.

The framework draws from new institutional theory that emerged in the 1970s led by John Meyer and colleagues and incorporates recent developments in new institutional theory by responding to literature that calls for new analysis of the changing environment in education (described as “an evolving technical environment”) through the lens of institutional theory (Boyd & Crowson, 2002; H. D. Meyer & Rowan, 2006a; Rowan, 2006). Rowan (2006) explained how

¹When ritual classifications (e.g., teacher certification, instructional time, class size, curriculum, instruction, resource allotments, organizational structure) become institutionalized and accepted as the normative definition of effective and legitimate schooling, then educational organizations are inclined to adopt such classifications into their formal structure to derive resources and legitimacy from the wider institutional environment (J. W. Meyer & Rowan, 1977, 1978; Rowan, 2006; Rowan & Miskel, 1999).

both the new institutionalism in organizational sociology and the American education system have evolved considerably since the 1970s. Thus, the changing context demands a revisit of how we might apply new institutional constructs that can account for both an evolving theory and its application to changing policy contexts, including the “tightening control of government over the core technology of schooling” linked to standards and accountability reforms (H. D. Meyer & Rowan, 2006b, p. 8); the growth of market-based reforms, which “now seem central to education reform” (Rowan, 2006); and the pluralistic interests that have led to changing power structures in education, including community control, that may lead to more diffuse and decentralized forms of schooling (Bidwell, 2006; H. D. Meyer, 2006; Rowan, 2006). Last, the framework incorporates microinstitutional perspectives that have also evolved since the late 1970s, including agency-based approaches to institutional change that reveal more about the process of institutionalization by focusing on actors’ microlevel responses to coercive isomorphic² pressures of the institutional environment (Burch, 2007; Spillane & Burch, 2006; Zucker, 1991).

We begin by first considering how different theories of action linked to the decentralized charter school reform have resulted in diverse forms of schooling. We categorize the theories of action into three distinct forms: diffuse forms of leadership and school organizations that have evolved in the form of community-based schools, external management of schools that are tightly aligned with market-based principals and are promoted by educational management organization (EMO)–run charters, and newly emerging charter management organization (CMO) charters that have created hybrid management structures that both mimic existing institutional governance structures and adopt centralized efficiencies as tools to scale-up more technically oriented forms of schooling. Then we present our theoretical framework for analysis of decentralized school organizations derived from new institutional theory. We posit that as charters evolve, they are forced to balance their internal objectives linked to technical efficiency with bureaucratic demands linked to institutional conformity (J. W. Meyer & Rowan, 1977; J. W. Meyer et al., 1983). Finally, we conclude with a discussion that contextualizes the challenges that charter schools encounter in their attempts to achieve scale. In doing so, we discuss how attempts by charter organizations to engage in local-level institution building and create new definitions of effective schooling are challenged by the demands of the wider institutional environment of public education.

COMPETING THEORIES OF ACTION

In this section we discuss three distinct theories of action—what we call *local control*, *market forces*, and *management recentralization*—that reflect the assumptions about educational change

²Isomorphism is an important concept that addresses how organizations that are responsive to an institutional environment evolve and interact within an institutional environment that defines or prescribes the normatively accepted practices of organizations. The institutional view of isomorphism is developed by Powell and DiMaggio (1991), who identified the following three mechanisms of institutional isomorphic change: (a) Coercive isomorphism results when organizations are persuaded, forced, or coerced to change by other organizations which they are dependent on. Coercive isomorphism is most common in organizations that operate in legal and political environments. (b) Mimetic isomorphism is linked to organizational uncertainty or ambiguity, which results in the imitation or mimicking of legitimate organizational structures in the institutional environment. (c) Normative isomorphism is based on the norms of professionalization where organizations adapt to, or reflect the increased specialization or professionalization in a field to signal legitimacy.

advanced by charter school reform leaders. We present them in static form that allows for little overlap between them; however, in practice many of the charter movement's reform leaders might subscribe to the tenets of more than one, creating a dynamic between the competing theories of action that is not always captured in the upcoming sections. Emphasizing the distinctions between charter schools is important for analytic purposes and for understanding the emergence of differentiated charter school types within the broader institutional context of public education (Brown, Henig, Lacireno-Paquet, & Holyoke, 2004).

Like other reform efforts, the charter school movement contains multiple theories of action that have reflected different, sometimes competing, theories of action held by its major actors over time. Despite these differences, researchers have tended to treat charter schools as an "undifferentiated mass," with little regard for the values and assumptions that give rise to particular types of charter schools (Henig, Holyoke, Brown, & Lacireno-Paquet, 2005, p. 514). However, some recent studies have begun to differentiate among charter school types, primarily those affiliated with for-profit EMOs and those that have their roots in the nonprofit, public service sector (Brown et al., 2004; Bulkley, 2002; Bulkley & Hicks, 2003; Henig et al., 2005). Henig et al., for example, introduced a theoretically based typology of charter schools that organizes charter school founders into two groups—"market" versus "mission" driven reformers. To study differences in charter school behavior, they further disaggregated these categories into subtypes, such as charter schools founded by educators, parent and community groups, or social service organizations, each with their own distinct theory of action for how to provide better educational outcomes for their students. These theories of action tell a mixed story of both divergence and convergence in organizational behavior among charter schools of different types and highlight the distinctiveness of charter school founders and the different theories of action they hold about educational change and upon which they build their schools.

Local Control

When state education laws opened the door for local control in the form of charter schools in the early and mid-1990s, the first founders were teachers and leaders of groups with a shared sense of missionary zeal and altruistic purpose, including community-based organizations, parents, and social service agencies (Henig et al., 2005; Fuller, 2000). They opened schools with very specific missions and visions that connected to particular pedagogical themes or particular types of students. In Washington, DC, for example, most of the first wave of schools to open after passage of the District of Columbia Public School Reform Act of 1995, also known as the Charter School Act, did so under the auspices of smaller community-based organizations, such as the Latin American Youth Center or Associates for Renewal in Education (Henderson, 2001), seeking autonomy to exercise what they believed was in the best interest of their students.

These early charter school operators defined the problem of public education in the same terms as did Albert Shanker, the former influential head of the American Federation of Teachers who first introduced the charter concept in the late 1980s. "The problem," according to Shanker (1988), "is that the traditional school structure virtually prohibits the teacher from arranging alternate ways the student might learn" (p. 92). According to this theory of action, students and teachers remain "locked" into a rigid schedule that emphasizes the "assembly-line processing of children" (p. 95) while a bloated bureaucracy increases in size year after year. The solution, or action, then, is for

teachers or activist groups to design and implement their own instructional programs according to their locally defined conceptions of good schooling. Broad-scale education reform would result from the divergent and hopefully innovative school programs educators would develop with their newfound autonomy to do something new and different in schools.

Adherents to this theory of action tend to come from two camps. The first, educational professionals, seek greater autonomy and are usually motivated by a particular pedagogical vision, which they cannot realize in the traditional public school system (Henig et al., 2005). The second, grassroots community organizations, seek greater control over the education of their constituent students. Henderson (2001), for example, observed that groups of parents or neighborhood leaders often see charter schools as “the logical response to a school system that has not responded to its community” (p. 32). Bruce Fuller and his colleagues (Fuller, Gawlik, Gonzales, & Park, 2004) go one step further, suggesting that charter activists “have become the new cultural relativists” (p. 96), creating schools that advance a specific cultural agenda, local identity, and particular way of raising children.

For both groups, qualified and motivated principals and teachers, who share similar pedagogical visions and who can create learning communities according to local definitions of fairness and effectiveness, are key assets in this theory of action. The movement’s early years relied on principals and teachers who were “willing to put in extremely long hours to work out the inevitable kinks in a new program, recruit families and teachers to a school with no track record, even mortgage their own homes to create their dream school” (Lake, 2007, p. 2). Opening new charter schools is similar to starting a new business; it requires a particular kind of educational entrepreneur who can manage the many facets of school start-up—instruction, operations, technology, finance, human resources, and real estate (Hassel, 2003). Consequently, this theory of action depends heavily on teachers’ and principals’ sense of mission and purpose to build schools according to their own visions for education.

Market Forces

Quite apart from local control, market forces is a theory of action that depends on competition and corporate efficiency as the key to better education. Adherents to this theory of action define the problems of public education in terms of an overly politicized, monopolistic government bureaucracy that creates inefficiency and inequity in the system (Chubb & Moe, 1990; Nathan, 1996). The focus in this theory of action is on economic principles of free market systems that emphasize parents as consumers who will seek to maximize their self-interest in pursuing their children’s education. Charter schools are thought to compete with one another for students in an educational market that determines which schools succeed and fail based on consumer choice and decision making. By creating new incentive structures, competition forces charter schools to improve their performance as they attempt to meet the needs of their clients (C. Lubienksi, 2001).

Proponents of this theory of action, like those of local control, believe that market forces will drive broad-scale education reform by encouraging innovation through autonomous charter schools; however, the driving force behind innovation is very different under the two theories of action. Whereas chartering opens the door for teachers and parents with innovative ideas to open new schools under the local control approach, market principles of choice may spur innovation

as schools search for the best ways to improve performance and create efficiencies as a result of competition with one another for students (C. Lubienksi, 2003). This theory of action thus positions schools as businesses that operate according to private-sector patterns of organizational behavior within the public domain of education (Brown et al., 2004; Henig et al., 2005; C. Lubienksi, 2001, 2003, 2005).

Although smaller “Mom and Pop” charter schools may in fact ascribe to the tenets of market forces, typically larger, for-profit EMOs are the operators closest aligned to this theory of action (Brown et al., 2004, p. 1039). EMOs are private companies that take responsibility for the management of some or all of a charter school’s operations and that explicitly pursue a profit motive (Bulkley, 2002; Scott, 2009). EMOs were a late entry to the charter school movement compared to the early “Mom and Pops,” having focused their attention on realizing profits in the district-run public schools prior to turning their attention to the charter school market (National Charter School Research Project, 2007; Wilson, 2005). But EMOs quickly realized the potential of charter schools operating in a decentralized context, accompanied by the removal of unwieldy bureaucratic controls found in a traditional school (Wilson, 2005). In the late 1990s and early 21st century, the number of EMOs entering the charter sector and the number of charter schools they operated increased dramatically, nearly quadrupling in size between 1998 and 2004 (Molnar, Wilson, & Allen, 2004).

There are some discernible differences between the ways EMO-operated charters behave compared to other charter schools. Achieving economies of scale is a key asset in the market forces theory of action, so not surprisingly EMO-founded charter schools tend to be larger than other charter schools (Brown et al., 2004; Henig et al., 2005), and take steps to cut costs, such as reportedly serving fewer students with special needs (Miron & Nelson, 2002). They also grant less autonomy to school-level decision making than intended by original charter school reformers (Brown et al., 2004; Bulkley, 2002) and are more likely to engage in high-cost marketing campaigns to recruit students (Henig et al., 2005), an attribute associated with the behavior of private sector businesses.

Like any good charter school, EMO-driven schools require principals and teachers committed to the vision of the school. Fidelity to the school model is critical for organizational success, yet it has proved challenging when EMOs enter multiple communities, each with their own locally conceived definitions of public schooling. To overcome this challenge, some EMOs have designed their own leadership development programs, such as the Edison Leadership Development Academy, to train principals in their particular model. They have also initiated broad-based, national recruitment campaigns for teachers and principals, and established human resource management practices aimed at improving the pipeline of teachers and administrators trained in the specific principles of the EMO’s model (National Charter School Research Project, 2007). Strategic human resource management is one of many practices that EMOs have borrowed from the business sector under the market forces theory of action, attempting to make EMOs more competitive in the high-stakes environment of charter school education.

Management Recentralization

Management recentralization is the term we use to describe the theory of action that corresponds with the newest wave of charter school reform, the emergence of nonprofit CMOs. CMOs are

centrally directed nonprofits that manage networks of schools, usually in one region or one state, utilizing common instructional models and school designs to achieve consistency and alignment across their schools (New Schools Venture Fund, 2006; Wilson, 2005). By organizing centrally, CMOs can leverage their size and resources to help charter school principals and teachers overcome the entrepreneurial challenges of building and sustaining new schools in the complex environment of public education.

The term CMO originally stems from an effort by the NewSchools Venture Fund, a venture philanthropy spun off from the venture capital firm Kleiner, Perkins, Caufield, and Byers, to distinguish nonprofit charter management organizations from their for-profit EMO counterparts (Wilson, 2005). Although on the surface CMOs appear similar to for-profit EMOs, they embody a different theory of action. Adherents to the management recentralization theory of action believe the pace of charter school reform has been too slow and has yet to achieve enough high-quality schools to have an impact on the broader system of public education. They see that the original vision for charter school growth—teachers and community groups starting new, innovative, and ultimately better schools under the local control theory of action—has been too difficult to realize (Harvey & Rainey, 2006). Although studies of charter school achievement have yielded mixed findings, it has become increasingly clear that charter schools, on average, do not outperform traditional public schools in any significant way (e.g., Carnoy, Jacobsen, Mishel, & Rothstein, 2005; Hoxby, 2004a, 2004b; S. T. Lubienski & C. Lubienski, 2006). Moreover, recent research around charter school innovation reveals greater instructional and curricular conformity among charter schools than originally predicted by both the local control and market forces theories of action (C. Lubienski, 2003, 2004). After 15 years of reform efforts, charter school leaders have begun to rethink their approach to educational change.

To achieve high-quality charter schools at scale, many charter school leaders have adopted a new approach that emphasizes centrally “managed growth” (National Charter School Research Project, 2007, p. 9) as a strategy to achieve broad-scale education reform. Successful charter school founders, who opened their schools under the local control theory of action, now seek to replicate their success by opening up additional schools. For example, Amistad Academy is a highly regarded charter middle school started in 1999 by a group of Yale Law students in New Haven, Connecticut, that eventually grew into a leading charter management organization. In 2003, the Amistad founders launched Achievement First, a nonprofit CMO designed to take the Amistad model to scale. They organized a central office to manage the expansion effort, which ensures fidelity to the original Amistad school model by creating alignment around multiple areas, such as curriculum, recruitment, and talent development. Today, Achievement First manages 15 charter schools in Connecticut and New York, all modeled after the original Amistad Academy (Achievement First, 2009).

Supporters of management recentralization tend to be leaders of established, successful charter schools who want to expand their operations, as well as the movement’s intellectual leaders who recognize that the “frontier era” of charter school growth, in which unprepared and undercapitalized charter school founders were once welcome, is over (National Charter School Research Project, 2007, p. 9). Instead, they focus now on creating institutions that can bring successful charter school models to scale. Doing so requires central planning and coordination, the reverse for a movement aimed at decentralizing public education. The key resource in this theory of action is the CMO structure—decentralized vis-à-vis the broader system of public education, yet tightly linked internally by a standard school model and standard set of operating

practices—which provides charter leaders with the organizational structure to build not just one school, but an entire charter school system.

Achieving scale, however, has to date presented charter school reformers with many challenges, an issue which we take up in the final section. In the next section, we present a theoretical framework that helps explain the challenges charter schools face when addressing rule-based demands linked to institutional legitimacy while attempting to advance new and innovative forms of schooling that are more attuned to the technical environment of local schools.

THE INSTITUTIONAL AND TECHNICAL ENVIRONMENTS OF EDUCATIONAL ORGANIZATIONS

Looking at decentralized school policy through the lens of institutional theory allows us to identify whether the decentralized conditions under which charter schools operate can influence changes within the wider institutional environment. Principally, it is necessary to focus on how decentralization might influence institutional shifts that could accommodate new innovations created by the charter school movement, or whether the existing norms, rules, and expectations of the institutional environment lead decentralized schools to adopt the accepted normative definitions of effectiveness that are linked to bureaucratic and rule-based compliance.

An institutional perspective assumes that charter schools, like all public schools, are still operating within a highly institutionalized environment. The institutional environment identifies legitimate forms of schooling via a school's conformity to environmental conditions that define effectiveness through standardization and certification procedures (the symbolic rituals, norms, and myths of the institutional environment), rather than measurable outcomes (J. W. Meyer & Rowan, 1978). By concentrating on coordinating ritual classifications (e.g., teacher certification, instructional time, class size, etc.) rather than the technical aspects of education (e.g., measurable outcomes), schools can avoid controlling their outputs and avoid inspection, which can call attention to the lack of coordination between instruction and outputs.

However, recent scholarship in institutional theory suggests that the nature of early institutional analysis has not kept pace with new advances in education policy and reform specifically, policy shifts that may demand schools to operate in a much more elaborate technical environment than they did when Meyer and Rowan first developed the constructs that identified educational organizations in the late 1970s and 1980s. For example, Rowan and Miskel (Rowan, 2006; Rowan & Miskel, 1999) argued that institution building on the part of state and federal government agencies, education professionals, and private organizations has advanced an increasingly technical theory of education along with the capacity to inspect and monitor instructional performance in schools and classrooms.

That institutional environments can change over time is consistent with earlier work in institutional theory. Scott and Meyer (1991), for example, explained that technologies can be introduced into institutional environments and become institutionalized in their own right, adding to the technical nature of a field. But they argued that the coexistence of institutional and technical environments will lead to high levels of internal conflict, as organizations seek to operate in accordance with both strong technical and institutional controls. According to Rowan and Miskel (1999), this appears to be the case today in public education, “where a lack of consensus over appropriate institutional arrangements for schooling is clearly on the rise” (p. 365).

We posit that charter schools represent prime examples of the conflict that arises when organizations evolve in the context of institutional and technical demands, trapping them between technical pressures for performance and institutional pressures for conformity. In essence, shifting policy demands that call for increased technical efficiency may lead to an exchange of the primary sources of legitimacy from institutional to technical definitions of schooling. For example, schools today are expected to be held accountable first for outputs such as making adequate yearly progress stipulated by the No Child Left Behind law, yet they also are accountable for ensuring that bureaucratic inputs such as standardized curricula are in place. However, it is not clear the extent to which recent policy shifts have resulted in redefining formal sources of legitimacy centered on technical efficiency or whether traditional institutional expectations remain the primary source of legitimacy for schools.

In the context of decentralized charter school reform, schools will have to make significant inroads in redefining normative criteria of effective schools, both at the local level and in the wider environment, to successfully challenge the existing and robust institutionalized definitions of effective schooling. However, institutional theory predicts that “organizations fail when they deviate from the prescriptions of institutionalizing myths: Quite apart from technical efficiency, organizations which innovate in important structural ways bear considerable costs in legitimacy” (J. W. Meyer & Rowan, 1977, p. 353). In other words, organizations that challenge institutionalized conceptions of effective schooling may be seen as ineffective and risk their legitimacy. Organizing around the technical core in attempts to sustain innovations—as charter schools in theory are supposed to do—while challenging the rituals and belief structures of the institutional environment may in time prove to be the biggest challenge for new charter school organizations seeking legitimacy while operating in a highly robust institutional environment.

Even more so than traditional public schools, charter school survival may depend on both conformity to institutional norms and technical efficiency (Huerta, 2007). The exchange for freedom from the bureaucracy that a charter school enjoys comes with the provision of performance accountability. Thus, in principle, charter schools will be more likely than traditional public schools to challenge the loose coupling norm of education by organizing around their technical core. Charter authorizers, for example, can revoke a school’s charter for failure to meet the stated and agreed-upon objectives for student performance, leading to school closure, presumably situating charter schools in even stronger technical environments than those of most traditional public schools. Yet of the 436 charter schools that have closed nationwide in the last 16 years, only 9% have closed because of academic achievement issues, whereas 91% have closed for financial or organizational mismanagement and other reasons that are associated with rule-based compliance linked to upholding institutional norms, not technical efficiency (Center for Education Reform, 2006). Thus, as charter school reform evolves, there is evidence that legitimacy, and ultimately organizational survival, still depends on upholding traditional institutional definitions of effective schooling.

Without normatively acceptable legitimated accounts of their existence, charter organizations will be seen as negligent or irrational by external constituencies, thereby strengthening internal dissidents and jeopardizing an organization’s survival (J. W. Meyer & Rowan, 1977). Whether charter schools can sustain organizational structures that are responsive to their technical environments, while still operating within the wider institutional environment, is the principal theme that drives this analytical discussion.

TABLE 1
The Competing Environments of Charter Schools

	Bureaucratic Frame (Institutional Environment)	Decentralized Frame (Technical Environment)
Organizational Environment	Schools are responsive to bureaucratic demands and attuned to a well-defined institutional environment, which results in tighter coordination of ritual classifications and less organizational ambiguity (J. W. Meyer, Scott, & Strang, 1987; Scott, 1998).	Schools operate in a decentralized context and are more attuned to their technical environment, resulting in tighter control of technical activities and less organizational differentiation (J. W. Meyer, Scott, & Deal, 1983; Pfeffer & Salancik, 1978).
Organizational boundaries	Schools are open systems, closely linked to the institutionalized definitions of production. They rely on ceremony in the form of certification and standardization to decouple their technical core from their formal structure (J. W. Meyer & Rowan, 1978; J. W. Meyer, Scott, & Deal, 1983).	Schools are closed systems and structured around the technical core. They decouple technical work from “environmental conditions,” which could disrupt production, resulting in a tighter link between goals of the organization and the technical core (J. W. Meyer, Scott, & Deal, 1983).
Organizational structure	Schools are subject to institutionalized rules and norms and are organized around a set of ritual classifications that define legitimate forms of schooling (J. W. Meyer & Rowan, 1978; J. W. Meyer, Scott, Strang, & Creighton, 1988).	Schools that are free from regulatory controls and subject to locally defined demands will create innovative organizational structures, teaching and learning methodologies, and local accountability measures.
Accountability	Effectiveness is measured by the ability of a school organization to respond and conform to rule-based bureaucratic definitions of efficiency (J. W. Meyer, Scott, & Deal, 1983).	Effectiveness is measured by meeting explicit outcome goals set by local actors, as opposed to bureaucratic conformity and rule-based accountability advanced by the institutional environment (J. W. Meyer, Scott, & Deal, 1983).

Competing Charter School Environments

Table 1 provides a detailed description of the organizational context advanced by the institutional and technical environments of public schools. For the purposes of this analytical discussion, we divide the organizational environments defined by institutional theory into two conceptual frames—the *bureaucratic frame* and the *decentralized frame*. These two conceptual frames provide a richer context to the organizational structure and institutional pressures that schools must navigate. Based on the assumptions advanced by the wider theory of action of charter schools, where effectiveness is defined by locally conceived measures of accountability rather than bureaucratic demands, we describe the decentralized framework of charter schools as a closed system where schools are structured around the processes linked to their technical environment. In contrast, according to the teachings of institutional theory, traditional public schools operate within a bureaucratic framework and operate as open systems that are responsive to rule-based accountability advanced by the institutional environment.

Organizational Environment. Institutional theory describes school organizations as open systems that are reliant on the external institutional environment for organizational survival.

However, an organization that substitutes the institutional environment for a new technical environment in essence becomes a closed system that is more attuned to its technical core of production (J. W. Meyer et al., 1983). J. W. Meyer et al. (1983) explained how “the technical organization faces in toward its technical core and turns its back on the environment, while the institutionalized organization turns its back on its technical core to concentrate on conforming to its institutional environment” (p. 47). In the context of charter schools, organizing around the technical core means that a more explicit link is made between teaching and learning practices and expected measurable outcomes, and legitimacy is no longer derived from upholding rule-based accountability.

Organizational Boundaries. As closed systems, charter schools will seal their technical core from institutional demands and allow the school organization, via locally created definitions of effectiveness, to manage production (J. W. Meyer et al., 1983). However, as J. W. Meyer and Rowan (1977) explain, “organizations which have structural elements not institutionalized in their environments should be more likely to fail, as such unauthorized complexities must be justified by claims of efficiency and effectiveness” (p. 361). In other words, in an attempt to make explicit links between the organizational structure of a school and its technical core, charter schools may advance new technical conceptions of efficiency not linked to institutionally accepted definitions, and the rejection of institutionalized definitions of efficiency may risk introducing a level of ambiguity that may prove too challenging to sustain.

Organizational Structure. Recall that the normatively accepted and popular conception of effective schools is that they operate as rational systems that tightly coordinate the production of teaching and learning. The reality, however, is that schools operate as very loosely coupled organizations that are responsive to their institutional environment (Weick, 1976) and thus build gaps between their formal structures and technical core (J. W. Meyer et al., 1983). The formal structure is responsive to the environmentally created institutionalized rules and norms that define legitimate schooling, and it buffers teaching and learning activities (i.e., the technical core) from the demands of the institutional environment. However, when a school rejects structural conformity and instead chooses to organize around its technical core, it becomes subject to unbuffered scrutiny that may challenge the organization’s ability to document its efficiency and establish its legitimacy. The direct control and coordination of instructional activities and outputs “can uncover inconsistencies and inefficiencies and create more uncertainty than mere abstract and unenforced demands for conformity to bureaucratic rules” (J. W. Meyer & Rowan, 1978, p. 80).

Accountability and Measuring Effectiveness. As charter school organizations face inward and become more attuned to their technical environment, then, according to the market forces theory of action, this new sector of decentralized schools will lead to the creation of a competitive education market. The education market will be driven by the quality of a school’s programmatic offerings defined by easily accessible and rationally organized academic performance indexes (in the form of output measures). Institutional theory suggests that “market mechanisms are presumed to be of primary importance in the case of technical environments. This

suggests that organizational conformity (whether structure, process, or outputs) is not compelled by formal rules or the threat of delegitimation, but by a concern for profitability and survival in the competitive market” (J. W. Meyer et al., 1983, pp. 63–64). In other words, schools that are more attuned to their technical environment will earn legitimacy in accordance to their performance in the local market structure and their ability to adapt to the market driven pressures that define effective education practices.

The market-driven environment, however, will involve higher scrutiny of the technical core of an organization. As J. W. Meyer and Rowan (1977) explained, “when output can be easily evaluated, a market often develops, and consumers gain considerable right of inspection and control. In this context, efficiency often determines success” (p. 354). Thus, the success or effectiveness of a school that is responsive to its technical environment is no longer determined by its ability to conform with institutionalized rules but rather by its ability to tightly coordinate and explicitly link the means of production with measurable outputs. If charter schools cannot sustain a competitive advantage over traditional schools while attempting to advance a technical organizational structure, their innovations may appear ineffectual compared to traditional institutionalized school structures and practices.

The market forces theory of action, in particular, assumes that charter schools will operate in pure exchange markets, which will lead to greater organizational variability and improved school performance as schools organize in response to the technical demands of teaching and learning. But charter schools do not operate in perfectly competitive exchange markets; rather, they operate in “quasi-markets” that hinder the capacity for innovation and variation because of continued institutional pressures (Lubienski, 2003). The combination of quasi-market “failures” (Lubienski, 2003, p. 421) and continued pressures toward institutional isomorphism may ensure that charter schools will never operate in purely technical environments as originally hoped for by charter school proponents.

In a sense, charter schools are caught in the middle between the market forces and local demands of technical environments on one hand and the isomorphic pressures of institutional environments on the other. In fact, absent a pure exchange market, charter school policies of school choice, competition, and regulatory autonomy may actually encourage isomorphism rather than work against it, as charter schools seek to gain legitimacy in what still amounts to be a very robust institutional environment of public education (Huerta, 2007; Lubienski, 2003, 2005). Recent research on charter schools supports this hypothesis, revealing greater convergence around organizational behavior than expected (Henig et al., 2005), as well as instructional and curricular conformity across the charter school population (Lubienski, 2004).

Applying constructs from institutional theory as an analytical lens to the evolving theories of action will assist researchers in explaining and predicting the challenges that different charter school types may encounter as they evolve in the wider institutional environment of schools. For example, local control schools that promote idiosyncratic schooling models linked to specific community needs may result in a myriad of diffuse and differentiated schooling models that are challenged in their attempts to earn legitimacy and prove their efficacy outside traditional institutional definitions of effectiveness. Market-based schools, driven by their attempt to capture a market share of students and realize profits, may integrate market-based efficiencies common in the private sector that may prove too unorthodox to the robust institutionalized definitions of schooling. In time, these unconventional practices may force schools to succumb to the isomorphic pressures that promote institutionalized forms of schooling. Finally, management recentralization

schools attempt to create economies of scale by mimicking traditional centralized structures that supply services and support to a wider network of schools aligned with explicit technical forms of schooling (without the goal of realizing a profit). By shifting the formal structure of schools to centralized network offices whose structures are linked to institutionalized sources of legitimacy, the network buffers school level actors and allows them to engage in more technical forms of schooling that are tightly linked to the internal goals of the CMO network.

Microinstitutionalism

The role of individual actors in organizations and their agency in navigating macro institutional forces are also important to consider in an analysis of evolving charter school organizations. Specifically, the analysis of institutionalized organizations must go beyond focusing on governance and regulatory demands and should expand to include the actions of individual actors and their work in a macroinstitutional context, as they navigate the shifting policy, political, and legal contexts that are attempting to influence changes in schools today. This is consistent with the notion of an expanded definition of institutional governance that may be leading to more technical forms of schooling, beyond the traditional links to myths, ceremony and loose coupling (H. D. Meyer & Rowan, 2006a; Rowan, 2006).

Micro-organizational analysis complements macro-organizational perspectives and provides insight into the nuances of how organizations develop and the agency that actors within organizations possess in navigating institutional pressures—described by Zucker (1991) as the “cognitive processes involved in the creation and transmission of institutions” (p. 104). In our framework, we posit that accounting for the influence of microlevel actor agency will allow us to better understand how institutionalized scripts, which lead new school organizations to succumb to the isomorphic forces of the wider institutional environment, are interpreted and adapted by local actors (DiMaggio & Powell, 1983; J. W. Meyer & Rowan, 1977, 1978).

Microinstitutionalism has important implications for analyzing and understanding the “dynamic aspects of institutions” (Schneiberg & Clemens, 2006, p. 217) and understanding the work of evolving charter organizations. Through the microperspective, institutionalization is seen as a process in which individual or groups of actors champion new or alternative organizational models within an organizational field (DiMaggio, 1988; Schneiberg & Clemens, 2006; Tolbert & Zucker, 1994). In charter school reform, we suggest that the “empty institutional structures” (Kolderie, 2004) of charter schools create the space for different microlevel actors to mobilize around new and different models or logics of schooling. Although many models will tend to reproduce the macro order through processes of isomorphism, some invariably will not. But to carry new logics and organizational forms generated within individual charter schools outwards, “institutional entrepreneurs” (DiMaggio, 1988) working within the charter movement must build new institutional forms as a contingency to the challenges to scale. Charter school actors are in the process of building schools that reflect the diverse theories of action contained within the decentralized reform and their presence in the education field is consistent with a growing recognition in institutional analysis more broadly that organizational fields encompass multiple and competing logics, models, and organizational forms (Schneiberg & Clemens, 2006; Scott, 2003). Thus, by exercising their agency within institutional environments of education, individual actors may build new organizations that support the transmission of culture across an increasing

number of schools and students, representing a viable and growing alternative to the existing institutional order of public education.

CHALLENGES TO SCALE IN EDUCATION

Macro- and microlevel institutional processes can be contextualized through an analysis of the challenges of scaling-up charter school reform: specifically, the technical, regulative, economic, political, and cognitive challenges that actors within school organizations confront in the process of building charter schools.

Achieving scale within charter school reform has been a difficult proposition. Reformers have adhered to an “organic” logic of growth, by which new and innovative charter school ideas will somehow travel on their own volition from one school to another, absent a strategic and technical plan for institutionalizing new models of schooling across the wider educational field (National Charter School Research Project, 2007, p. 12). For example, prior to management recentralization, the ideas and practices of what some have called “break-the-mold” schools, such as Amistad Academy in New Haven, Connecticut, or KIPP Academy in the South Bronx, New York, remained isolated pockets of schooling, independent of a broader social context (Thernstrom & Thernstrom, 2003, p. 43). The assumption was that new ideas such as KIPP’s longer school day or Amistad’s use of interim assessments, would simply take hold and spread. The practice of management recentralization by CMO-operated charters, however, reflects a fundamental belief on the part of charter school leaders that large-scale change in education will not occur unless the charter movement creates institutional structures that facilitate the deliberate re-creation of successful school models.

Building and sustaining new charter schools is in fact hard, demanding work that has created technical challenges for teachers and leaders, not unlike that of past generations of “break-the-mold” reformers described by David Tyack and William Tobin (1994). Wohlstetter and Griffin (2001), for example, spoke to the challenges inherent in the local control theory of action and described the tensions and overwhelming demands faced by charter school leaders when balancing instructional and managerial responsibilities in decentralized autonomous schools. Huerta (2009) described the economic and political challenges by arguing that public authority is not a commodity that can simply be devolved to local actors and result in empowerment. Instead, empowerment through decentralization is a process that must account for local economic and political conditions and the ability of local actors to activate public authority.

Regulative norms may also challenge charter school expansion. Despite their freedom from the bureaucratic rules and regulations of the “one best system,” charters have for the most part tended to display little innovation and variation in organization and instruction (Lubienski, 2004), suggesting the influence of an institutionalized “cultural construction of schooling” that has been harder to alter than perhaps originally understood (Tyack & Tobin, 1994). According to this perspective, charter schools must look and act the part of “legitimate” schools (i.e., certified teachers, standardized curricula) to acquire the necessary resources for survival and growth, so innovation and variation is limited (DiMaggio & Powell, 1983; J. W. Meyer & Rowan, 1977, 1978).

Last, the declining rate of charter school openings indicates the supply of educators willing to open new charter schools appears nearly tapped out (Lake, 2007), suggesting a failure in

the institutional makeup of charter school reform to leverage different incentive structures to build a large-scale reform effort. Elmore (1996) emphasized how reform efforts often rely on the practice of a small group of intrinsically motivated teachers who are willing to learn new ways of organizing schools and engage in the arduous process of improvement. Absent a broader institutional reform agenda, charter schools have been no different than other reform efforts in this regard, concentrating small numbers of like-minded “believers” in isolated school settings where they have been free to experiment with different forms of organizational models and instruction independent of a broader social context. From Elmore’s perspective, such a structure may be problematic because it provides little incentive for all but a small proportion of the total teaching force to change—the ones who are highly motivated and excited to engage in serious reform in the first place.

The challenges of scale in charter school reform, then, are similar to those of previous reform efforts—they are deeply rooted in the cultural norms of education institutions and in the failure of these institutions to change their incentive structures to align with broad-scale change. Unless modern reform efforts, like charter schools, seek to alter existing institutional arrangements and their associated incentive structures in clear and systematic ways, then they are destined to fail on a broad scale like many previous well-intentioned reform efforts (Elmore, 1996). Indeed, it is evident that scale may entail an acknowledgment of institutional barriers if schools are to address the more technical aspects of their practice in the process of redefining and transforming school organizations. Charter schools that attempt to promote more technical forms of schooling linked to the decentralized theory of action advanced by school operators will be forced to reconcile the demands of their local organizational goals with those of the wider and more robust institutional environment as they attempt to go to scale.

CONCLUSION

Charter schools are showing that innovations in teaching and learning and school organizational models are possible as a result of their decentralized context (Fuller, 2000; Huerta, 2000; Wexler & Huerta, 2000). However, the process of sustaining innovations is challenged by the institutionalized conditions that protect the status quo. Even incremental changes that could influence institutional shifts and accommodate innovations prove to be challenging under these conditions. Although it is clear that charter school reform has yet to yield large numbers of new, different, and better public schools, what remains less clear is how those that are succeeding in “breaking the mold” have done so, and how they are building new institutions that may in turn pressure change in the environment.

Future research is needed to investigate both the micro- and macroenvironmental conditions that trigger isomorphism to understand how charter school organizations may counter the forces of isomorphism. New research must also begin to look at how charter schools are reacting to changes in their institutional environment, including the wider charter school movement, the changing discourse of regulatory schemes at the state level, and the local conditions that either foster or reject the development of new organizational forms. Research must also focus on gaining school-level insights that go beyond a snapshot description of charter school organizations and provide a longitudinal lens into the organizational evolution of decentralized charter schools as they navigate the institutional environment.

Further research of charter schools through the lens of new institutional theory will allow us to understand which decentralized theory of action may prove to hold the most promise in advancing new definitions of schooling that can challenge the institutionalized “rationalized myths” that define school effectiveness (J. W. Meyer & Rowan, 1977). The challenge for research is to understand the process of how charter schools evolve within the wider institutional environment of public schooling, and how the actors within charters reconcile macro-institutional forces with microlevel institution-building efforts that may lead to new definitions of effective schooling.

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