

Selected sources for CommonCoreFlowchartAW.pdf

## **BILL AND MELINDA GATES FOUNDATION**

### **Two former staff of Gates Foundation are now on U.S. Education Department:**

<http://www.bizjournals.com/seattle/stories/2009/05/18/story2.html?page=all>

- James (Jim) Shelton, a former deputy director of education at the Gates Foundation who is now assistant deputy secretary at the Education Department. He also heads the agency's Office of Innovation and Improvement.

“Shelton, the former Gates Foundation official who is now an assistant deputy secretary at the Education Department, will manage a \$650 million federal fund that will invest in education innovation, among other things.”

- Margot Rogers, a former special assistant to the director of education programs at the Gates Foundation. She is now the chief of staff for Education Secretary Arne Duncan, the former CEO of Chicago Public Schools.

“It is not unfair to say that the Gates Foundation's agenda has become the country's agenda in education,” said Michael Petrilli, vice president for national programs and policy at the Thomas B. Fordham Institute in Washington, D.C. The Fordham institute itself has received nearly \$3 million in Gates Foundation grants.

[http://www.businessweek.com/magazine/content/10\\_30/b4188058281758.htm#p4](http://www.businessweek.com/magazine/content/10_30/b4188058281758.htm#p4)

“Today, the Gates Foundation and Education Secretary Duncan move in apparent lockstep. Two of Duncan's top aides, Chief of Staff Margot Rogers and Assistant Deputy Secretary James H. Shelton III, came from the foundation and were granted waivers by the Administration from its revolving-door policy limiting involvement with former employers.”

### **14 out of 16 Race to the top Grant Recipients had financial aid from Gates Foundation:**

[http://www.mtairynews.com/view/full\\_story/6589448/article-N-C--one-of-16-finalists-for-Race-to-the-Top?instance=special\\_coverage\\_bullets\\_right\\_column](http://www.mtairynews.com/view/full_story/6589448/article-N-C--one-of-16-finalists-for-Race-to-the-Top?instance=special_coverage_bullets_right_column)

“All the winners except Delaware and South Carolina got financial help from the Bill & Melinda Gates Foundation in preparing their “Race to the Top” application. The foundation gave many states grants of up to \$250,000 each to pay for a consultant to help them craft their application.”

### **Funding to NGA, CCSSO and Achieve:**

<http://chronicle.com/blogs/innovations/the-core-between-the-states/29511>

Between January 2008 and November 2010, the Gates Foundation had contributed more than \$35-million to the Council of Chief School Officers and the National Governors Association Center; it gave Achieve \$12.6-million in February 2008;

### **\$1 million to PTA to organize parent endorsement of Common Core:**

<http://www.gatesfoundation.org/press-releases/Pages/national-parent-teacher-association-common-core-standards-091202.aspx>

“The association today announced a new three-year effort to mobilize parents to advance key education priorities, beginning with common core state standards... A \$1 million grant from the Bill & Melinda Gates Foundation will help support the effort.”  
(note: a link in the above press release to the PTA release no longer works.)

**\$3 million to ASCD to promote Common Core with educators:**

<http://thejournal.com/articles/2011/04/05/gates-foundation-ups-stake-in-common-core-standards.aspx>

The Bill & Melinda Gates Foundation is upping its financial support for Common Core State Standards. The foundation awarded \$3 million to ASCD to support that group's efforts to help education leaders and educators themselves understand the standards and implement them.

ASCD, formerly known as the Association for Supervision and Curriculum Development, is a group focused on leadership and professional development activities in education.

**\$20 Million in Grants for projects aligned with Common Core:**

<http://www.gatesfoundation.org/press-releases/Pages/common-core-tools-110427.aspx>

The Bill & Melinda Gates Foundation today announced a suite of investments, totaling more than \$20 million, focused on identifying and expanding promising cutting-edge learning resources that support teachers and students and bring innovative new instructional approaches into America's classrooms. These investments support the development of game-based learning applications; math, English language arts and science curricula built in to digital formats; learning through social networking platforms; and embedded assessments through a real-time and engaging environment of experiences and journeys. All these promising resources are aligned to the Common Core State Standards, which are college- and career-ready standards being implemented in more than 40 states.

**\$3 Million to Pearson for digital instruction resources:**

<http://www.pearsoned.com/pearson-foundation-partners-bill-melinda-gates-foundation-create-digital-learning-programs/>

The Pearson Foundation today announced a partnership with the Bill & Melinda Gates Foundation to support America's teachers by creating a full series of digital instructional resources.

Intended as a free sample that will then guide them into buying more services:“Funding from the Bill & Melinda Gates Foundation will support four courses to be offered as free, open educational resources ... explore opportunities for additional commercial development and distribution.”

**Bill Gates Endorsing Public/Private Partnership of Common Core:**

<http://www.schoolsmatter.info/2009/07/gates-on-alignment-of-common-core.html>

<http://www.gatesfoundation.org/speeches-commentary/Pages/bill-gates-2009-conference-state-legislatures.aspx>

Bill Gates to the the National Conference of State Legislators

“When the tests are aligned to the common standards, the curriculum will line up as well—and that will **unleash powerful market forces** in the service of better teaching. For the first time, there will be **a large base of customers eager to buy products** that can help every kid learn and every teacher get better.”

“If your state doesn’t join the common standards, your kids will be left behind; and if too many states opt out—the country will be left behind. Remember—this is not a debate that China, Korea, and Japan are having. Either our schools will get better—or our economic position will get worse.”

(Do the people get to debate these things in China, Korea and Japan?)

### **Who wrote the standards?**

<http://chronicle.com/blogs/innovations/the-core-between-the-states/29511>

A. a 29-member Common Core Standards Development Work Group (to develop “college-and career-ready” high school exit standards), consisting chiefly of **testing experts** and developers;

B. a **three-member** writing team for ELA/R and a **three-member** writing team for mathematics to develop K-12 grade-level standards in each subject. Each is guided by external review groups made up chiefly educators or education faculty;

C. a 25-member Validation Committee, appointed in September 2009 and made up mostly of testing experts, professors of education, **one mathematician, one expert on English** and reading standards, and a few school administrators and teachers. These groups included few professors of English, mathematics, science, engineering, or economics, or high-school teachers of mathematics or English. But they were mostly made up of **people who work for testing organizations** (e.g. ACT, the College Board, and Achieve, Inc.)

### **Governor Herbert on education outcomes:**

[http://www.utah.gov/governor/news\\_media/article.html?article=7691](http://www.utah.gov/governor/news_media/article.html?article=7691)

Governor Named to National Governors Association Education and Workforce Committee

Sep 07 2012

"It is an honor to serve on the NGA Education and Workforce Committee," said Governor Herbert. "Because of their economic impact, education and workforce development are priority issues for the State of Utah. We are striving to **align educational outcomes with employer needs** more than ever before, and that starts with greater flexibility on federal education policies that affect states."

Governor Herbert was also recently tagged for the NGA's Executive Committee.

### **PEARSON**

#### **SLDS System and Pearson:**

<http://www.prweb.com/releases/2011/02/prweb5083674.htm>

Utah State Office of Education Partners with Pearson for New Statewide Longitudinal Data System

The Utah State Office of Education (USOE) has selected Pearson to design, integrate and deliver the **federally funded** Utah e-Transcript and Record Exchange (UTREx) project. The new system will serve a **wide range of stakeholders** in improving student achievement by providing Utah's educators with quality and timely information. UTREx will help track student performance and fulfill the need for more automated and timely student data collection and distribution.

**Pearson owns employer of UT State Senator and chair of Senate education committee Aaron Osmond:**

<http://techcrunch.com/2012/05/16/pearson-buys-certiport-for-140m-to-beef-up-its-it-testing-business-globally/>

Wednesday, May 16th, 2012

Pearson Buys Certiport For \$140M To Beef Up Its IT Testing Business Globally

<http://le.utah.gov/Interim/2012/html/00002657.htm>

“Sen. Osmond noted that he has reviewed these potential conflicts with Senate leadership, who concluded that no change in committee assignment is necessary at this time. Sen. Osmond stated that he has also recused himself from any interim committee votes or decisions relating to the Common Core or any topic that would benefit his employer or its related companies.”

<http://www.sltrib.com/sltrib/news/54930024-78/preschool-program-osmond-state.html.csp>

(Question: Will this affect his support of state-funded pre-school as Pearson’s services are PreK-12 and existing contracts stand to benefit from additional services for tracking preschool students?)

**Pearson on profits from Common Core:**

<http://online.wsj.com/article/SB10001424052702303674004577434430304060586.html>

Textbook Sales Likely to Rise on New Rules

“It’s a really big deal, says Peter Cohen, CEO of Pearson’s K-12 division, Pearson School. The Common Core standards are affecting literally every part of the business we are involved in.

**Pioneer Institute on Costs of Implementing Common Core:**

<http://pioneerinstitute.org/education/study-estimates-cost-of-transition-to-national-education-standards-at-16-billion/>

This is not easy to measure, and these are not all new costs, but diverted costs... in the absence of any cost analysis done by the State itself, this is the best projection I could find. In this report costs for Utah are projected as follows:

The Pioneer Institute published an analysis in February 2012 that estimates professional development costs for Utah to be about \$50 million, the cost of textbooks and materials between \$25 to \$50 million, and technology costs at nearly \$100 million over the first seven years. The Pioneer Institute concludes their report with the same question many

have: “Is realigning the local education system to the Common Core standards the best investment of scarce educational resources?”

Not all of this money will go to Pearson... of course there are other players, but because of their political alignment and connection to the writing of the standards themselves they are better positioned than their competitors to take advantage of new education spending resulting from Common Core adoption. They are also more diversified than their competitors offering not only texts, but teacher development resources and technology for testing and database tracking of student information.

**Pearson uses its non-profit foundation and money given to CCSSO to pay for decision-makers travel:**

[http://www.nytimes.com/2012/01/02/education/inquiry-into-school-officials-travels-paid-for-by-pearson.html?\\_r=3&ref=pearsonplc](http://www.nytimes.com/2012/01/02/education/inquiry-into-school-officials-travels-paid-for-by-pearson.html?_r=3&ref=pearsonplc)

Six months later, in Frankfort, Ky., Ms. Young sat on a committee interviewing executives from three companies bidding to run the state’s testing program. While CTB/McGraw-Hill submitted the lowest bid, by \$2.5 million, Ms. Young and the other committee members recommended Pearson.

Pearson has paid for the trips through the Council of Chief State School Officers. The foundation’s most recent tax form, from a year ago, lists a \$100,000 contribution to the council.

<http://www.nytimes.com/2011/12/22/education/new-york-attorney-general-is-investigating-pearson-education.html?sq=winerip%20pearson&st=cse&adxnnl=1&scp=1&adxnnlx=1325277442-2cBF28a11fOmt8cxo/iJQ>

**Pearson for profit and non-profits are closely tied:**

<http://www.nytimes.com/2011/10/10/education/10winerip.html?pagewanted=all>

But there appears to be considerable intermingling. For example, a woman named Kathy Hurley is vice president of strategic partnerships at both the company and the foundation.

<http://www.nytimes.com/2011/09/19/education/19winerip.html?ref=michaelwinerip>

States whose officials have attended Pearson conferences and also have contracts with Pearson include: Florida, to administer state tests; Virginia, to provide online courses; California, Georgia and Michigan, for teacher certification programs; Iowa, to develop eTranscript and portal systems; and South Dakota, to create alternate assessment tests for the disabled.

Even as the foundation has been helping education officials travel the globe, the company has had major problems. In 2010, Pearson paid a \$15 million penalty to Florida for delivering test scores a month late and a \$5 million fine to Wyoming after its online testing system malfunctioned. Oklahoma officials have been debating whether to terminate a \$16 million contract because of scoring errors.

“Pearson has the worst track record of any firm in the industry over the past decade, possibly because they have expanded so rapidly,” said Bob Schaeffer, a spokesman for FairTest, an advocacy group opposed to standardized testing.

**Familiar names in Pearson curriculum:**

<http://www.phschool.com/>

Pearson Prentice Hall—along with Pearson Scott Foresman, Pearson AGS Globe, Pearson Learning Group, and Pearson Digital Learning—are now the Curriculum group of Pearson.

<http://www.examiner.com/article/what-is-pearson-plc-how-did-it-get-so-big>

### **Pearson the biggest player in education:**

[http://www.huffingtonpost.com/alan-singer/pearson-education-new-york-testing-b\\_1850169.html](http://www.huffingtonpost.com/alan-singer/pearson-education-new-york-testing-b_1850169.html)

Pearson, a British multi-national conglomerate, is one of the largest private businesses maneuvering for U.S. education dollars. The company had net earnings of 956 million pounds or approximately 1.5 billion dollars in 2011.

...

The Pearson footprint appears to be everywhere and taints academic research as well as government policy.

<http://in.reuters.com/article/2012/08/02/usa-education-investment-idINL2E8J15FR20120802>

According to a recent article on Reuters, an international news service based in Great Britain, "investors of all stripes are beginning to sense big profit potential in public education. The K-12 market is tantalizingly huge: The U.S. spends more than \$500 billion a year to educate kids from ages five through 18. **The entire education sector, including college and mid-career training, represents nearly 9 percent of U.S. gross domestic product, *more than the energy or technology sectors.***"

### **Could changes to FERPA benefit Pearson?**

As the partner in creating the SLDS database for Utah, and according to unauthorized changes to FERPA made by USED, Pearson would be designated as "authorized representative" and might even have access to use student data under the IT "auditing" loophole. (See lawsuit details below.) Pearson Chief Education Officer, Sir Michael Barber has stated his desire to have "every child on the agenda." It is difficult not to imagine there would be significant profitable ventures given access to and analysis of this kind of data on students and their families. Almost certainly this data will be interpreted in ways to influence future educational policy... perhaps even benefiting their business.

### **Is Utah's SLDS legal under national and state FERPA law?**

<http://epic.org/apa/ferpa/default.html>

On February 29, 2012, EPIC filed a lawsuit under the Administrative Procedure Act against the ED. EPIC's lawsuit argues that the agency's December 2011 regulations amending the Family Educational Rights and Privacy Act exceed the agency's statutory authority, and are contrary to law. EPIC is joined in the lawsuit by co-plaintiffs Grayson Barber, Pablo Garcia Molina, Peter G. Neumann, and Dr. Deborah Peel. The Education Department filed its answer to EPIC's complaint on May 4, 2012, requesting that the Court dismiss EPIC's complaint.

On July 23, 2012, EPIC filed a Motion to Supplement the Administrative Record and Consider Extra-record evidence with the Court. In its motion, EPIC requested the Court to order the Education Department to supplement the administrative record to include four document sets that were before the Education Department at the time of its decision, and were considered by the agency when it issued its NPRM and subsequent final regulations. Additionally, EPIC requested that the Court consider extra-record evidence that is highly relevant to the final regulations and

necessary for effective judicial review. For example, at the time that the agency issued the final regulations, it had not offered guidelines on student data and cloud computing. After the Education Department issued its regulations, the agency created a document which provided cloud computing guidance. Importantly, this document explains that even though "outsourcing information technology (IT) functions" would not "traditionally be considered and audit or evaluation," the Education Department will consider outsourcing IT functions as "auditing" or "evaluating" under FERPA regulations. FERPA permits nonconsensual disclosure of education records to "authorized representatives" for audits and evaluation of federal and state education programs.

**Over concerns regarding federal control of tests, Utah moves to withdraw from SBAC while spending \$39 million with AIR for what seems to be the same tests: Smarter Balanced Assessment Consortium Selects American Institutes for Research to Create an Online Test Delivery System for States**  
[http://www.air.org/reports-products/index.cfm?fa=viewContent&content\\_id=2043](http://www.air.org/reports-products/index.cfm?fa=viewContent&content_id=2043)

A state school board appointed committee has decided to accept a bid from the American Institutes for Research to build a new computer-adaptive assessment system, which will test students on Utah's new Common Core academic standards.  
<http://www.sltrib.com/sltrib/news/55349773-78/tests-state-system-students.html.csp>

**NO EVIDENCE to support assumptions and claims that economic success depends on or even corresponds to education as measured by standardized tests:**

[www.aasa.org/uploadedFiles/.../JSP\\_Winter2011.FINAL.pdf](http://www.aasa.org/uploadedFiles/.../JSP_Winter2011.FINAL.pdf)

“Christopher H. Tienken, Editor of AAASA Journal of Scholarship and Practice provided commentary in the Winter 2011 publication entitled Common Core State Standards: An Example of Data-less Decision Making.”

“His research may just expose the standards to be unfit and fallacy to those who are critical thinkers asking for data determining their stated validity. This article should be studied by educators, politicians, taxpayers, to understand the colossal farce Common Core standards are in terms of providing promises of educational improvement for American students as they are unproven and untested.”

<http://conservative-outlooks.com/2013/01/07/debunking-the-common-core-the-emperors-new-clothes-narrative/>

**Relationship between Achieve, key contributor to writing and evaluation of the Common Core Standards as claimed on their own website and Pearson:**

Before they worked on the Common Core Standards, Achieve was already working with the NGA to create Algebra standards and testing that was tried in a number of states. Here is brochure from that project. Please note the contact email domain is pearson.com and the copyright is held by Pearson, Inc. “or its affiliates.” See screen captures below:



Achieve

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