The Gates Foundation MET Research Project As a Case of Philanthrocapitalism

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In 2009 the Bill & Melinda Gates Foundation launched the Measures of Effective Teaching [MET] research project. The goal of the MET project was to develop instruments and protocols for evaluating teaching and distinguishing teachers who are effective from those who are not. The MET project was a massive three-year, $45 million undertaking. It studied six school districts and 3000 teachers in the United States, collected digital video of 13,000 classroom lessons, administered surveys to students, and tracked student scores on two separate tests in efforts to stipulate the parameters of effective teaching. Reports from the MET project publicized research results about how effective teaching might be defined and measured. MET project analyses and conclusions were published in scholarly academic venues, policy briefs, and popular media from 2010 through 2013 when the project closed. The $45 million MET Project was directed and funded entirely by the Bill & Melinda Gates Foundation.

The Gates' MET project is just one instance of philanthrocapitalism, currently the fastest growing source of funding for educational (and healthcare) research in the United States. Philanthrocapitalism – also called venture philanthropy, creative capitalism, assertive philanthropy, and impact investing – pertains not only to the Gates Foundation, but also to the Eli Broad Foundation, the Clinton Foundation, the Walton Foundation, George Soros, Angelina Jolie, and Bono (among others). Research funding from philanthrocapitalism has increased substantially, and the sociopolitical role of philanthropic organizations in research endeavors has changed dramatically since 2008 (Reckhow 2013; Reckhow and Snyder 2014; Tompkins-Stange 2016a, b; Hess and Henig 2015).

This paper examines the Bill & Melinda Gates Foundation MET project and synthesizes current research on philanthrocapitalism to highlight some implications of current trends in funding for educational research. Issues of philanthrocapitalism

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in educational research include the establishment of an incestuous plutocracy, the conduct of educational research in a shadow economy, the promotion of the special interests of private wealthy donors, and shifts in the terms of debate about educational issues for research in the public interest.

Overview of the Gates Foundation MET Research Project

"Measures of Effective Teaching" is actually the third major educational project funded this century by the Bill & Melinda Gates Foundation. The first was the 2000–2004 Small Schools Initiative, a $51 million grant to support the establishment of 67 small schools in New York City. It is widely agreed that the Small Schools Initiative failed to produce the desired results, and so it was abandoned by the Gates Foundation in 2006 (some say prematurely). The second major Gates-funded project in education is the Common Core State Standards [CCSS], which the Gates Foundation began funding in 2009. The $200 million budget was spent largely on funding research, working with Pearson Publications to develop materials, and lobbying state officials to support the adoption of the CCSS in individual states.[1] As of 2016, only seven (of 50) U.S. states have not adopted the CCSS, and so the project is generally regarded as successful, if not always popular.[2]

The Measures of Effective Teaching [MET] project was designed to create research instruments and protocols that would allow schools to identify "effective" teachers and distinguish them from "ineffective" teachers. According to a Bill & Melinda Gates Foundation Policy Brief:

> In fall 2009, the Bill & Melinda Gates Foundation launched the Measures of Effective Teaching (MET) project to test new approaches to recognizing effective teaching. The project's goal is to help build fair and reliable systems for teacher observation and feedback to help teachers improve and administrators make better personnel decisions. (Gates Foundation 2010 online)

The MET Project was directed by Steven M. Cantrell, Ph.D., an education research and policy executive who was the Chief Research Officer for the Bill & Melinda Gates Foundation and provided leadership during the years of the MET project. Other authors of the MET research reports included Principal Investigator Thomas J. Kane (Harvard Professor of Education and Economics; Brookings Institution fellow), Daniel F. McCaffrey (RAND Corporation), and Douglas O. Staiger (Dartmouth Professor of Economics). In its early years, the MET project claimed partnership with several universities (Dartmouth, Harvard, Stanford, University of Chicago, University

[1] According to the U.S. Constitution, education belongs in the jurisdiction of individual states, and so it is technically illegal to initiate or enforce educational reform at a national/federal level. The CCSS are meant to apply nationally, but (as the name implies) all educational policies must be adopted and implemented at the state level.

[2] Most objections to the CCSS come from the U.S. Right on the grounds that CCSS constitutes big government interference with education, which belongs rightfully to individual states. Some objections come from the U.S. Left on the grounds that education decision-making should not be driven by private money, but by elected officials.

of Michigan, University of Virginia, and University of Washington), nonprofit organizations (Educational Testing Service, RAND Corporation, the National Math and Science Initiative, and the New Teacher Center), and other consultants (Cambridge Education, Teachscape, Westat, and the Danielson Group).

At its outset, the MET project took a stand against the prevailing approach to teacher evaluation that uses only student test-score data to determine whether a teacher is effective. In the United States, the reliance on student test-score improvement as the basis for teacher evaluation is known as "Value Added Measures" or VAM.[3] Instead of a VAM-only approach to teacher evaluation, the MET project originally planned to investigate multiple measures in order to design a composite protocol to measure teacher effectiveness. In addition to student test scores, the researchers would also collect data from two other sources: classroom observations and student perception surveys. The research was conducted in 3000 classrooms (Mathematics and English Language Arts) in six urban school districts across the United States (New York City, Charlotte-Mecklenburg in North Carolina, Hillsborough County in Florida, Memphis in Tennessee, Dallas in Texas, and Denver in Colorado, plus a pilot study in Pittsburgh, Pennsylvania). The results of the MET research project were reported in four policy and practitioner briefs published between 2010 and 2013.

MET research project policy and practitioner reports:

1. First MET Report (2010) *Learning about Teaching: Initial Findings*. It examined correlations between student survey responses and value-added scores computed from state tests and from higher-order tests of conceptual understanding. The study found that the measures are related, but only modestly.
2. Second MET Report (2012). *Gathering Feedback for Teaching: Combining High-Quality Observation with Student Surveys and Achievement Gains.* It focused on classroom observation protocols as potential measures of teacher effectiveness. The report found that the observation instruments examined have fairly low reliability and are only weakly correlated with value-added measures.
3. Third MET Report (2012) *Asking Students about Teaching: Student Perception Surveys and Their Implementation*. It focused on student surveys as potential measure of teacher effectiveness. The report found that teachers' student survey results are predictive of student achievement gains.
4. Culminating MET Report (2013). *Ensuring Fair and Reliable Measures of Effective Teachers*. It summarized recent analyses from the MET project on identifying effective teaching while accounting for differences among teachers' students, on combining measures into composites, and on assuring reliable classroom observations.

[3] VAM is actually calculated by comparing the actual test score relative to the statistically predicted test score.

Year One: Learning About Teaching – Initial Findings

The MET study design was sophisticated and ambitious. In the first year researchers collected data from two different standardized tests, classroom observations, and student perception surveys across 13,000 classroom lessons with 3000 different teachers. The aim of the first phase was to set up an analysis protocol that would isolate the effects of the teacher from other variables that affect student achievement. In their efforts to isolate teacher effects, MET researchers analyzed the test scores of two different classes taught by the same teacher to see if the score changes in one class reliably predicted the score changes in another class. Researchers also compared test score changes for the same teacher in two different years. In this way, researchers worked to eliminate the possibility that test score gains were a function of a particular class or year rather than the teacher.

The research report from the first year of the MET project claimed four initial findings:

1. A teacher's past VAM results were the best predictors of subsequent VAM results.
2. Teachers with the highest VAM results on the (easier) standardized test tended to produce higher scores on the (more difficult) conceptual test.
3. Student evaluations of teaching tended to align with VAM scores.
4. Feedback from classroom observations have potential to help teachers improve their practice.

Year Two: Gathering Feedback for Teaching – Combining High-Quality Observation with Student Surveys and Achievement Gains

The second year of the MET project focused on investigations of instruments to be used to record classroom observations (Wood et al. 2014). The analysis of classroom observation instruments was based on 7491 videos of instruction by 1333 teachers in grades 4–8. MET researchers studied the validity and reliability of five established and widely implemented classroom-observation protocols:

- Framework for Teaching [FFT] developed by Charlotte Danielson of the Danielson Group.
- Classroom Assessment Scoring System [CLASS] developed by Robert Pianta, Karen La Paro, and Bridget Hamre at the University of Virginia.
- Protocol for Language Arts Teaching Observations [PLATO] developed by Pam Grossman at Stanford University.
- Mathematical Quality of Instruction [MQI] developed by Heather Hill of Harvard University.

- UTeach Teacher Observation Protocol [UTOP] developed by Michael Marder and Candace Walkington at the University of Texas-Austin.

The policy report in year two claimed five major findings:

1. All five observation instruments were positively correlated with VAM results.
2. Reliability of the instruments required averaging scores across multiple raters and multiple observations.
3. Reliability across time was better when classroom observation ratings were combined with VAM and student perception surveys.
4. The combination of classroom observations with VAM and student perception surveys was more reliable than credentials or years of teaching experience for predictions of VAM across time.
5. The combination of classroom observations with VAM and student perception surveys was more reliable than credentials or years of teaching experience for predictions of scores on the more difficult conceptual tests.

Year Three: Asking Students About Teaching – Student Perception Surveys and Their Implementation

The third year of the MET project focused on the role of student perception surveys in teacher evaluation. The MET project analyzed the validity and reliability of four different student perception survey instruments:

- Tripod 7Cs, developed by Harvard researcher Ronald Ferguson (survey was distributed and administered by Cambridge Education)
- YouthTruth, developed and distributed by the Center for Effective Philanthropy
- My Student Survey, developed by Ryan Balch, Expert Fellow at Vanderbilt University
- iKnowMyclass, developed by Russell Quaglia at the Quaglia Institute for Student Aspirations in Portland, ME, as tool for teacher feedback.

To provide some idea of the sorts of questions included on the student surveys, here are the seven constructs the Tripod 7Cs instrument uses to operationalize students' perceptions of teaching:

Care: My teacher seems to know if something is bothering me.
Control: My classmates behave the way the teacher wants them to.
Clarify: My teacher knows when the class understands.
Challenge: In this class, we learn to correct our mistakes.
Captivate: I like the way we learn in this class.
Confer: My teacher wants us to share our thoughts.
Consolidate: The comments I get help me know how to improve.

In addition to those seven constructs, the survey also included "engagement items" in four other categories: academic goals and behaviors, academic beliefs and feelings, social goals and behaviors, social beliefs and feelings.

Most of this third MET policy report consists of methodological explanations of how validity and reliability were examined in the process of administering the student perception surveys. The report claimed to have established five benefits of student perception surveys for the evaluation of teaching:

1. Feedback. Results point to strengths and areas for improvement.
2. "Face validity." Items reflect what teachers value.
3. "Predictive validity." Results predict student outcomes.
4. Reliability. Results demonstrate relative consistency.
5. Low cost. Expense of administration is minimal.

Culminating Report: Ensuring Fair and Reliable Measures of Effective Teachers

The last MET report summarizes the three-year research project and sets priorities for the evaluation of teachers. The report claims that the MET project has provided answers to three big questions:

- Can measures of effective teaching identify teachers who better help students learn?
  Answer: Yes
- How much weight should be placed on each measure of effective teaching?
  Answer: 33–50% weight on VAM test scores
- How can teachers be assured trustworthy results from classroom observations?
  Answer: By having more than one observer complete evaluations.

After three years and $45 million of research funding, the culminating report announced five conclusions:

1. Student perception surveys and classroom observations can provide meaningful feedback to teachers.
2. Implementing specific procedures in evaluation systems can increase trust in the data and the results.
3. Each measure adds something of value.
4. A balanced approach is most sensible when assigning weights to form a composite measure.
5. There is great potential in using video for teacher feedback and for the training and assessment of observers.

Each of the four MET policy and practitioner reports has been critiqued and reviewed. Prominent critical reviews of the MET reports were written by researchers from the National Education Policy Center (NECP), which leans Left, and has been consistently critical of privatization agendas in educational research and policy. Several points of critique raised by NECP reviewers will be cited in the second part of this paper to develop the analysis.

Philanthrocapitalism As Exemplified by the MET Project

The term *philanthrocapitalism* was coined by Matthew Bishop in 2006 (Bishop and Green 2015, p. 541). In their book subtitled "How the Rich Can Save the World," Bishop and Greene (2008) explained this new approach to "giving" this way:

> As they apply their business methods to philanthropy, philanthrocapitalists are developing a new (if familiar-sounding) language to describe their businesslike approach. Their philanthropy is 'strategic,' 'market conscious,' 'impact oriented,' 'knowledge based,' often 'high engagement,' and always driven by the goal of maximizing the 'leverage' of the donor's money. Seeing themselves as social investors, not traditional donors, some of them engage in 'venture philanthropy.' As entrepreneurial 'philanthropreneurs,' they love to back social entrepreneurs who offer innovative solutions to society's problems. (Bishop and Greene 2008, p. 6)

By most accounts, philanthrocapitalism differs from previous versions of philanthropy in several ways. First, unlike earlier philanthropic tycoons, philanthrocapitalists do not "give away" money; they "invest" money in particular projects with the expectation of some kind of return on their investment. Eli Broad, for example, claims to be "not in the check writing charity business. We're in the venture philanthropy business" (quoted in Riley 2009). Second, philanthrocapitalists tie funding to particular policy outcomes; they are invested not only monetarily but also politically. Third, current philanthrocapitalist funding reflects the values and priorities of individual living donors who tend to work as hands-on directors of the projects they fund. By most accounts, compared to other philanthrocapitalist organizations, the Bill & Melinda Gates Foundation has been less interested in making a profit, and more interested in effecting social change, particularly in global health and education.

Philanthrocapitalism has garnered a fair amount of criticism in the United States. Most criticism comes from the U.S. political Left on the grounds that private funds, and the pro-privatization agendas of philanthrocapitalists do not serve the public good (Au and Ferrare 2014; Gabriel and Allington 2012; Garnett 2016; Reich 2013). The Gates Foundation, however, is also criticized by the political Right who object to Gates' promotion of the Common Core State Standards, which is regarded by the Right as too much big government interference in education (Porter-Magee and Stern 2013).

In this section, I synthesize commentaries by several researchers to suggest four broad features of philanthrocapitalist research funding in the United States as exem-

plified by the Gates MET project: incestuous plutocracy, shadow economy, advocacy over analysis, and business over education.

Incestuous Plutocracy

Plutocracy Since about 2008, funding patterns for educational research have changed in important ways. Research funding from U.S. government sources has declined, and funding from private foundations has increased steeply. Philanthropists have been funding educational research in the United States for decades. However, the bulk of research funding used to come from governmental sources such as the National Science Foundation. The NSF overview statement typifies the status and role of governmental funding sources for research:

> The National Science Foundation (NSF) is an independent federal agency created by Congress in 1950 'to promote the progress of science; to advance the national health, prosperity, and welfare; to secure the national defense…' With an annual budget of $7.5 billion (FY 2016), we are the funding source for approximately 24 percent of all federally supported basic research conducted by America's colleges and universities. In many fields such as mathematics, computer science and the social sciences, NSF is the major source of federal backing… NSF determines which research has the greatest potential and would be the most fruitful investment of taxpayer dollars. (National Science Foundation)

In this mission statement, we can see that the NSF holds itself accountable, at least in principle, to the general public – national health, prosperity, and welfare – and to taxpayers.

In contrast, funding for educational research now comes primarily from private donors who invest their money in the tradition of philanthrocapitalism: "The Gates Foundation has outfunded the U.S. Department of Education on studies of teacher effectiveness at a rate of about 40 to 1" (Gabriel and Allington 2012, p. 44). Michigan State University Professor of Political Science Reckhow (2013) describes changes in philanthropic involvement in education from the 1990s to the 2000s this way:

> Three key changes in the nature of philanthropy have allowed major education grant makers to play a more public role and have a greater policy influence: (1) major foundations are giving away more money, (2) individual philanthropists and education philanthropies have become more openly involved in policy advocacy, and (3) major foundations have tried to emulate business practices and develop more selective and targeted grant-making strategies. In combination, these changes mean that major foundations have more resources to promote their policy ideas, they are more openly political about supporting their ideas, and they are learning to be more effective in the ways they distribute funds to advance their ideas. (Reckhow 2013, pp. 27–28)

Because philanthrocapitalists are not only monetarily but also politically invested in the educational projects they fund, the choices of projects for support reflect the personal preferences of the individual donors. Since all philanthropists are rich, current funding for educational research has taken on characteristics of a plutocracy. As Reich (2013) noted: "A democratic society is committed, at least in principle, to the

equality of citizens. But foundations are, virtually by definition, the voice of plutocracy."

It is perhaps worth noting that public school educational research and reform is now being directed and funded by people whose children do not attend public schools. All research for the MET project was conducted in U.S. public schools. Bill and Melinda Gates' own children attended the Lakeside School in Seattle, which is a private school and therefore not considered for inclusion in the MET project, and not subject to the reform initiatives advocated by the Bill & Melinda Gates Foundation.

Incestuousness Funding for educational research is coming from rich private donors; that's the plutocracy part. But equally remarkable is the degree to which the various philanthropic agencies are connected to each other, and how their respective reform agendas appear to be aligned. To begin with, nearly all philanthropists in the United States are White men. According to the BBC, as of 2015 there were only two Black billionaires in the United States (Michael Jordan and Oprah Winfrey), compared to 500 White billionaires (BBC News 2015), and so cultural homogeneity pertains even at demographic dimensions of philanthropy. Educational policy analyst Rogers (2015a, b) concurs: "There is, at the very least, a narrowing of voices in education reform. That pattern began around 2000 and has accelerated since 2005, as a result of big donor philanthropy" (p. 746).

One dimension of incestuousness reflected in the Gates project is that MET research appears to have relied almost exclusively on its own paid researchers for background, design, and analysis of the research. The critical reviews by Rothstein and Mathis (2013) and Guarino and Stacy (2012) note that the MET reports appear to have drawn their conclusions without making reference to previously published research that speaks directly to the questions posed by the MET project, and without submitting their research design or analyses to peer review.[4] In addition, critical reviews of the MET research reports were published after every MET report, but there is no indication that the specific methodological critiques in those reviews had any impact on the subsequent conduct of the research or reports of the MET findings.

Several researchers have documented the incestuous practices of philanthrocapitalist agendas for funding educational research. As Reckhow and Tompkins-Stange (2015) note in the title of their article, the Gates and Broad foundations are "Singing from the Same Hymnbook" when it comes to choosing and designing educational projects to fund. Similarly, Scott and Jabbar (2014) describe the trend toward inbreeding as "the hub and the spokes," in which there is one agenda for reform – the hub – around which various philanthrocapitalist organizations and foundations radiate like so many spokes. Garnett (2016) calls the homogeneity of philanthrocapitalism a "walled garden." Vogel (2016) notes that a homogeneity of agendas comprises a "tangled network" of (primarily right-wing) organizations including advocacy groups (e.g., StudentsFirst), media (e.g., Education Next), philanthropy (e.g.,

[4] Rothstein cites the following studies as pertinent to the MET research, but absent from the MET report: Kane and Staiger (2008); Rivkin et al. (2005); Rothstein (2010). Guarino and Stacy also mention Corcoran et al. (2012); Guarino et al. (2012).

Charles Koch Foundation), corporations (e.g., Pearson PLC), and think tanks (e.g., American Enterprise Institute). Vogel refers to the incestuousness of philanthrocapitalism as an "echo chamber," saying there are:

> many overlapping connections in this echo chamber of advocacy groups, think tanks, and media outlets that are increasingly funded by a handful of conservative billionaires and for-profit education companies—often without proper disclosure. These groups are driving the education privatization movement forward by co-opting the education reform mantle. (Vogel 2016 online)

The incestuous network of philanthrocapitalism extends to include even media outlets such as the U.S. National Public Radio that have traditionally been regarded as independent. Because of foundation advocacy funding for media coverage, there are very few opportunities for critique or external review of philanthrocapitalist agendas in education reform:

> In the field of education, where Gates' emphasis on teacher quality and small schools has been hotly debated, a $500,000 grant to the Brookings Institution aims to 're-engineer media coverage of secondary and postsecondary education.' *Education Week* magazine has received $4.5 million from the Gates Foundation. (Doughton and Heim 2011, online)

The Gates Foundation is directing the choices for school reform, the approach to research of those choices, the review of their own research, and the media coverage that publicizes their research.

Finally, the philanthrocapitalistic network has extended its reach into governmental offices. The activity and prominent visibility of big-money foundation work has led to the placement of former Gates Foundation staff members into positions of power in large urban school districts and in the U.S. Department of Education including Jim Shelton, U.S. Assistant Deputy Secretary for Innovation and Improvement, and Joanne Weiss, director of the Obama administration's Race to the Top.

Vogel's (2016) meticulous analysis shows that not only is philanthrocapitalism the exclusive domain of the richest people, but that among the primary players, there is apparently no disagreement about priorities; instead there is a blanket acceptance of the value of privatized schools and the use of VAM for teacher evaluation. Notably, there is no apparent acknowledgement or consideration of the viewpoints of people whose children attend the schools that are being studied and subjected to foundation-sponsored reforms.

"Incestuous practices" refers to an inbred network of think tanks, advocacy groups, university research units, and foundations – including Gates – that have established their legitimacy by referencing one another in a tight orbit of relations. Vogel's (2016) analysis shows that in one case, a member of The74 media group is married to a board member of the StudentsFirst advocacy group. In another example, the American Federation for Children/Alliance for School Choice shares board and/or staff members with the Foundation for Excellence in Education, the Policy Innovators in Education Network, and the American Center for School Choice (Vogel 2016). This "echo chamber" network provides mutually reinforcing research, lobbying, funding and policy-making by a small number of elite groups that are all "singing from the same hymnbook" (Reckhow and Tompkins-Stange 2015).

NECP reviews of the MET policy and practitioner reports:

1. NECP Review of First MET Report (Rothstein 2010)
2. NECP Review of Second Report (Guarino and Stacy 2012)
3. NECP Review of Third Report (Camburn 2012)
4. NECP Review of the two culminating reports (Rothstein and Mathis 2013)

Shadow Economy and the Problem of Accountability

The National Science Foundation funds a great deal of university research in the United States. As a government-sponsored organization, its agenda, priorities, and criteria are publicly available, and the NSF budgetary operations are accountable to taxpayers. However, private foundations are under no obligation to make their operations public or to subject their decision making to any kind of scrutiny (LA Times Editorial Board 2016). Lack of accountability is one of the strongest and most frequent criticisms of philanthrocapitalist involvement in education, which includes the Gates MET project (Buchanan 2008; Reckhow 2013; Reich 2013; Tompkins-Stange 2016a, b).

Scott and Jabbar (2014) use the term "Intermediary Organizations" to refer to the network of foundations, think tanks, media groups, and corporations that operate in a fuzzy, ill-defined shadow economy. Intermediary Organizations are neither fully public nor fully private; they "include a range of entities, including think tanks, advocacy groups, teachers' unions, research consortia, civil rights organizations, lobbyists, and parent coalitions … that operate between formal policymaking structures and schools" (Scott and Jabbar 2014, p. 237). There are neither formal laws that regulate nor civic mechanisms that restrain the operations of Intermediary Organizations including philanthrocapitalist foundations, which places philanthrocapitlist educational projects in a shadow economy.

Reich (2013) argues that philanthrocapitalist foundations lack electoral accountability – if you don't like it, you can't vote them out; they also lack market accountability – if you don't like it, you can't boycott the product, either. Referring to SAC Capital, owned by Connecticut charter-school promoter Steven A. Cohen, Singer (2016) wrote: "Maybe someone can explain to me why the CEO of a company that pleaded guilty to criminal fraud, a man who is barred from managing other people's money, is permitted to influence educational policy in the United States" (Singer 2016).

One may argue that foundation-funded educational research and reform is not so shadowy because they are ultimately accountable to local school districts that have the option of refusing to participate in foundation-sponsored research or reforms.[5] That would be true if there were no element of coercion in the relationship between the foundations and the schools. Tompkins-Stange (2016b) describes typical situa-

[5] Thanks to Ethan Hutt for raising this point.

tions of educational funding in which state money is not available or not sufficient for schools, especially those in poorer areas. In those strapped conditions, school districts often agree to accept the "golden handcuffs" of private donors in attempts to improve conditions in their local schools. Tompkins-Stange goes on to note that this pattern of foundation-backed funding exacerbates inequalities between rich and poor school districts. Children in poor school districts are disproportionately subjected to the experimental educational pet projects favored by rich philanthropists, which usually amounts to privatization, more frequent testing, and more corporately owned charter schools. Tompkins-Stange writes, "Foundations are notoriously insular institutions, which rarely welcome or seek out criticism, especially from the voices of affected communities" (Tompkins-Stange 2016b).

In support of foundations' rights to do as they please with their own money, Coyne (2013) argues, "If we are truly committed to a free society, we should embrace foundations as a manifestation of private citizens making their best judgments with their own property" (Coyne 2013). That would be reasonable if philanthrocapitalist foundations were entirely private, and if they restricted their involvement to private corporate ventures. However, projects such as Gates' MET have extended their reach and intensified their influence into *public* education. The MET project (and the Common Core State Standards) have had a profound impact on publicly supported schools, but without shouldering concomitant accountability to the public. As University of Michigan Public Policy Professor Tompkins-Stange (2016b) asks, "Why should Bill Gates decide how our children should be educated?"

In the United States, tax incentives for philanthropic gifts began with The War Revenue Act of 1917, which specified deductions for:

> contributions or gifts actually made within the year to corporations or associations organized and operated exclusively for religious, charitable, scientific, or educational purposes, or to societies for the prevention of cruelty to children or animals, no part of the net income of which inures to the benefit of any private stockholder or individual, to an amount not in excess of fifteen per centum of the taxpayer's taxable net income as computed without the benefit of this paragraph. (War Revenue Act, ch. 63, section 1201[2], 1917)

Reich (2013) points out that since the enactment of this law, foundations have been publicly subsidized in two ways: "the donor makes the donation more or less tax-free, diminishing the tax burden she would face in the absence of the donation; and the assets that constitute a foundation's endowment, invested in the marketplace, are also mostly tax-free" (Reich 2013). Reich estimates that the loss to the U.S. treasury from these tax-sheltering arrangements for foundations has been approximately $53 billion. Based on the tax structure, it is not entirely true that foundation money is private money; foundations are themselves publicly subsidized at two levels of tax sheltering. Because foundations benefit greatly from public policy tax sheltering, it is not true that foundations function entirely in the private domain. Therefore, because they are subsidized by public money, foundations should not be exempted from accountability to the public interest.

The activities of foundations in the shadow economy have implications for educational policy at the national level. Rogers (2015a, b) wrote: "in 2003, 15 percent

of experts testifying before Congress had received funding from the Gates or Broad foundations. By 2011, it was 60 percent" (p. 745). Reckhow and Tompkins-Stange (2015) analyzed testimony in front of the U.S. Congress to examine the effect of philanthrocapitalist networks on the legislative process:

> Our analysis of congressional testimony suggests that alternate perspectives did not share the same level of coherence and cross-referencing among a broad set of actors. Thus Gates and Broad were able to amplify a message regarding teacher performance evaluation that did not face a rigorous and coordinated critique at the federal level. (Reckhow and Tompkins-Stange 2015, p. 74)

The Gates MET project was privately directed and privately funded, it was in effect an experiment on school children. The project has had an irreversible effect on public schools in some U.S. districts: "In cities like Memphis, New Orleans, New York and Los Angeles the money and monopoly of Gates and his cohorts have fundamentally changed the landscape of education, children's school experience, and patterns of access to school" (Olmedo and Ball 2016). In spite of these fundamental impacts, foundations have not been held accountable for their effects on the educational experiences of thousands of schoolchildren.

Advocacy Overrides Analysis: The Case of VAM

The Bill & Melinda Gates Foundation, like most current philanthrocapitalist foundations today, is directed by living donors who advocate for specific research agendas. Unlike most Right wing foundations, however, the Gates Foundation has a reputation for being less interested in monetary gain and more interested in having an impact on society. The drive to have an impact seems to have had an effect on what counted as research in the MET project: advocacy for specific reforms appears to have overridden scientific analysis in the research design and reporting. This section focuses on the special case of VAM as an indication of how advocacy affected analysis in the MET research project (Resmovitz 2013).

The advocacy-driven research in the MET project is not unique. Several commentators have remarked on the tendency for philanthrocapitalism to replace scientific research with advocacy for particular kinds of school reforms. As Buchanan (2008) wrote: "The biggest mistake comes in equating all of this emphasis on 'impact' and 'strategic philanthropy' with 'business' and 'capitalism.' It's as if these words are all synonyms to the authors" (Buchanan 2008, online).

Reckhow and Tompkins-Stange (2015) quoted an unnamed Gates foundation official who basically admitted that the MET research process was a pro forma exercise:

> It's within [a] sort of fairly narrow orbit that you manufacture the [research] reports. You hire somebody to write a report. There's going to be a commission, there's going to be a lot of research, there's going to be a lot of vetting and so forth and so on, but you pretty much know what the report is going to say before you go through the exercise. (quoted in Reckhow and Tompkins-Stange 2015, p. 70)

Over the three years of the MET project, the construct of Value Added Measures morphed from a dependent variable (one of multiple measures of teaching effectiveness) to an independent variable (the standard against which all other measures were validated). Before the first research report was published, a Bill & Melinda Gates Foundation 2009 press release indicated that MET would investigate several measures of effective teaching:

> The Measures of Effective Teaching (MET) project … seeks to develop an array of measures that will be viewed by teachers, unions, administrators, and policymakers as reliable and credible indicators of a teacher's impact on student achievement. (Gates 2009)

In the first (2010) MET report, most of the conclusions were focused on VAM: "Teachers with the highest VAM results on the (easier) standardized test tended to produce higher scores on the (more difficult) conceptual test; Student evaluations of teaching tended to align with VAM scores." Across those conclusions, VAM was still portrayed as a dependent variable, one of several measures of effective teaching.

In his critique of the first MET report, NCEP reviewer Rothstein (2011) noted that the data actually do not support the MET conclusions that VAM on one test is a good predictor of VAM on a different test:

> The data suggest that more than 20% of teachers in the bottom quarter of the state test math distribution (and more than 30% of those in the bottom quarter for ELA) are in the top half of the alternative assessment distribution. … More than 40% of those whose actually available state exam scores place them in the bottom quarter are in the top half on the alternative assessment. (Rothstein 2011, p. 5)

In its treatment of VAM data, the MET report indicates that advocacy for VAM was clouding the analysis and driving what was publicized as educational research; Rothstein provided a compelling analysis that the MET claim about the reliability of VAM results is not justified. Education journalist and New America Foundation fellow Goldstein (2015) agrees. She summarized the two main critiques of MET this way:

> first… the study's data does not support the Gate Foundation's strong preference for value-added measurement as the 'privileged' tool in evaluating teachers, and second… the very questions the Gates Foundation sought to answer limit policy makers' conceptions of how to improve student achievement. (Goldstein 2015, pp. 118–119)

By the second (2012) MET report, however, the construct of VAM had shifted from dependent variable to independent variable. From the second report on, VAM was held as the standard against which other measures would be validated. NCEP reviewers of the second (2012) MET report Guarino and Stacy (2012) wrote: "The title of the last chapter, 'Validating Classroom Observations with Student Achievement Gains,' signals a point of view that considers value-added measures of teacher performance to be valid a priori, a view that is still disputed in the research literature" (Guarino and Stacy 2012, pp. 7–8). Gabriel and Allington (2012) concur:

> In 2009, the Bill and Melinda Gates Foundation funded the investigation of a $45 million question: How can we identify and develop effective teaching? Now that the findings from their Measures of Effective Teaching (MET) project have been released …, it's clear they asked a simpler question, namely, What other measures match up well with value-added data? (Gabriel and Allington 2012, p. 44)

By the third (2013a, b) MET report, the entire analysis was focused on the question of whether student perception surveys reliably predicted VAM results. By the close of the MET project, the only measure of effective teaching was VAM of effectiveness, and other measures were pushed to the sidelines as redundant and/or too time-consuming as mechanisms for evaluating teachers. At a rhetorical level, MET reports continued to make claims that we should use multiple measures to evaluate teachers. However, those claims come across as empty political rhetoric in view of the fact that VAM had become the independent variable against which other measures were validated.

In an apparent effort to finesse its mixed messages about VAM, the culminating MET report took the stand that different measures ought to be combined into a "composite index" of teacher effectiveness. The culminating MET report claimed that different measures serve different purposes for teacher evaluation:

> **Each measure adds something of value**. Classroom observations provide rich feedback on practice. Student perception surveys provide a reliable indicator of the learning environment and give voice to the intended beneficiaries of instruction. Student learning gains (adjusted to account for differences among students) can help identify groups of teachers who, by virtue of their instruction, are helping students learn more. (Gates 2013a, p. 20)

After 3 years and $45 million, the culminating MET report came to the astoundingly underwhelming conclusion that: "Teachers previously identified as more effective caused students to learn more. Groups of teachers who had been identified as less effective caused students to learn less" (Gates 2012, p. 6).

The Gates MET project, as one part of the intertwined network of the shadow economy has had a profound impact on assumptions about teacher evaluation in the United States. VAM has become almost universally regarded as *the* way to measure the effectiveness of teaching. There is no longer any debate among grant-funding agencies about which other characteristics might constitute good teaching, in spite of the fact that no scientific research exists that documents the validity or educational efficacy of VAM to evaluate teacher effectiveness.

Business Conversations Replace Education Conversations

It is not news that business practices and agendas have prevailed over political, cultural, and educational discourses in the United States. In the 2016 U.S. presidential campaign we can see evidence of the widespread assumption that: If you know how to run a successful business, then you know how to run a successful school (or country…). Several aspects of philanthrocapitalism contribute to the proliferation of businesslike thinking throughout all sectors, most basic of which is that philanthrocapitalists are themselves businesspeople – not educators, not scholars, not politicians, not artists, and not lawyers. In addition, philanthrocapitalist foundations are closely partnered with for-profit corporations such as Pearson and Educational Testing Services [ETS]; educational research and reform activities reflect the mutual

agendas of philanthrocapitalism and profit-oriented corporations. Figueroa (2013) notes: "One of the best ways a standardized testing corporation can make more money is by coming up with new standards, which is why it's not surprising that Pearson has played a role in crafting the new Common Core State Standards" (Figueroa 2013).

In philanthrocapitalist educational grant-funding organizations, the parlance is no longer "educational research"; it is "educational R&D" (Sheekey 2013). With her critical response to the predominance of business practices in educational governance, Darling-Hammond's phrase has now become an internet meme: "We can't fire our way to Finland." Michigan State University notes with pride that Gates "uses the tools of business to improve educational systems" (MSU 2013). In social theory, these shifts are now being called the "foundationalization of social problems" and the "financialization of the public interest" (Social Finance 2017). The incestuous plutocracy of philanthrocapitalism circumscribes how it is possible to talk about education and educational research. This has resulted in an extreme narrowing of focus for any activity that can be called research; if the research does not test the implementation of an educational reform against VAM, it is not regarded as viable research for purposes of funding or policy considerations. That approach to educational research is a business conversation, not an educational conversation.

As an example of philanthrocapitalism, the Gates MET project participated in restricting the scope of what can legitimately be called educational research. Among policy makers for example, questions about the purpose of education are no longer taken seriously as research topics (Ladson-Billings and Tate 2006; Simon-McWilliams 2007). Educational research is now defined as implementation studies focused on whether schools operate in an efficient way as indicated by standardized tests that are developed by for-profit corporations. Test scores are euphemistically referred to as indicators of "student achievement," and research questions about other possibilities for educational achievement have been displaced. We can see this feature in the MET project's research construct of VAM as it morphed from one of many possible measures of effective teaching to the only measure of effective teaching. In addition to prioritizing technical efficiency, educational research is now dominated by questions of efficient scaling up. For example, in 2000 the Bill & Melinda Gates Foundation spent $2 billion advancing the Small Schools Initiative that established urban "learning communities" of fewer than 400 students. In this case, "scaling up" does not refer to building bigger schools; rather it refers to the assumption that there is a "silver bullet" that can be applied everywhere to solve whatever problems. A third aspect of the MET project influence on educational research is the shift of focus from long-term reform to short-term results. As in business ventures, success and failure of educational reform projects are declared almost immediately after a single – often experimental – intervention. Ventures that do not pay off within the initially established timeframe are abandoned, while philanthrocapitalists move on to launch the next experiment on children's education.

Closing: Educational Research in the Wake of the MET Project

> The *We're Pretty Sure We Could Have Done More with $45 Million Award* goes to the Gates Foundation and its Measures of Effective Teaching Project. NEPC

The Gates Foundation has recently admitted the failure of their approach to educational research, including the MET project. In her open letter, Bill & Melinda Gates foundation CEO Sue Desmond-Hellman acknowledged that the MET project failed to accomplish what it set out to do:

> We're facing the fact that it is a real struggle to make system-wide change…. It is really tough to create more great public schools. … This has been a challenging lesson for us to absorb, but we take it to heart. The mission of improving education in America is both vast and complicated, and the Gates Foundation doesn't have all the answers. (Desmond-Hellmann 2016)

The Gates Foundation laid out billions of dollars to pursue their vision of how to improve schooling in the United States. The MET project, along with the Small Schools Initiative and the Common Core State Standards have had profound impact on schoolchildren in the United States with disruptions in their school schedules and distraction of their teachers, with no detectable advantages for the children (Rogers 2013). I could find no evidence that children in the United States benefitted from Gates-funded educational reform projects. The ventures were experimental for the Gates Foundation, and as Olmedo and Ball (2016) wrote: "now we are being told 'sorry it was a mistake'" (Olmedo and Ball 2016). We will never know what effects a different $45 million investment might have had on the educational opportunities of the children in Pittsburgh, New York City, Charlotte-Mecklenburg, Hillsborough County, Memphis, Dallas, and Denver.

Even though the Small Schools Initiative and the MET project have been generally regarded as failures, the Gates Foundation and its Pearson partners have figured out how to monetize the failures for their own profit (Simon 2015a, b). In 2014 the Bill & Melinda Foundation published *Building trust in observations: A blueprint for improving systems to support great teaching,* which explicates in minute detail the protocol for setting up effective classroom observations. Schools interested in adopting these protocols for teacher evaluations may be interested to know that Pearson has developed and is now marketing digital instruments for scoring observations, as well as videotapes (used for calibrating scores), scoring rubrics, and workshops for training classroom observers (see, e.g., Fletcher et al. 2013).

There is one outcome of the MET project that has good potential for further educational research on effective teaching. The MET Longitudinal Database (videos and survey results) has been made publicly available to researchers outside the Gates Foundation through the Inter-University Consortium for Political and Social Research (Henig and Hess 2015). This is an enormous trove of data that is freely available to educational researchers. The available data could be used by those beyond the incestuous plutocracy for a variety of scientific research projects that would be shared

under conditions of accountability and transparency. These possibilities would make it possible to challenge business conversations with more educational conversations that are inclusive of a broader spectrum of voices, not least of which are the voices of those whose lives are affected by the proposed school reforms.

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