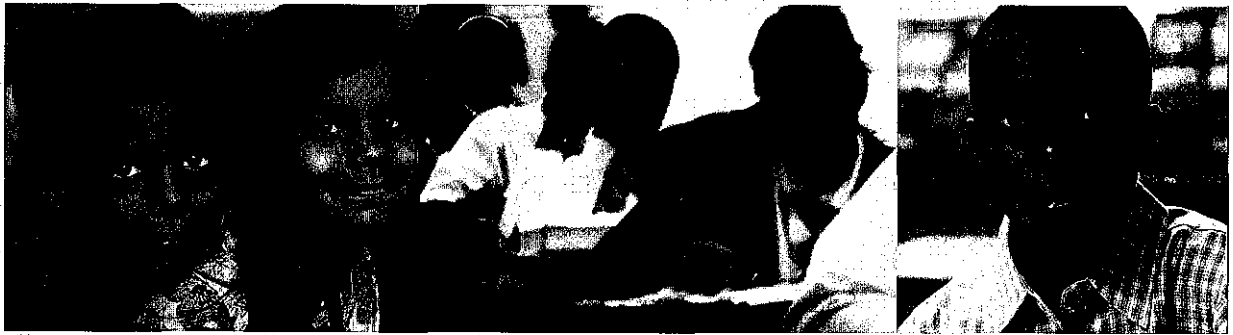


**Alliance for School Choice  
Strategy Retreat**

Hyatt Regency — Jersey City/Newark, NJ

**June 7-9, 2007**

**BATTLING IN THE TRENCHES**



**ALLIANCE FOR SCHOOL CHOICE**

June 7, 2007

Dear Friend of the Alliance for School Choice,

Welcome to Jersey City/Newark for the annual Alliance for School Choice strategy retreat. Our theme this year is *Battling in the Trenches*. We are very pleased that you have joined us, as we come together at a moment of unprecedented importance for K-12 education reform in this country.

This *Battling in the Trenches* theme is reflective of the work that has taken place over the past two years that has led to significant growth in the number and scope of state school choice programs: there are now twice as many programs and an additional 60,000 choice seats available for children to choose the school that best suits their educational needs. Last year represented the single-most successful year in the history of the school choice movement, as 10 programs were enacted and/or expanded.

Much of this success – as we will discuss – is due to the bipartisan appeal of school choice. For example, four of the five new programs enacted in 2006 were in states under the leadership of Democratic governors or legislatures – an unprecedented demonstration of Democratic favor for school choice. In addition, programs have earned credibility in research communities, as they have been studied by leading scholars in the fields of education, public policy, and economics.

We have started this year with a huge victory in Utah, where the nation's first statewide, universal voucher program was enacted. Also, another major success is the creation of a special needs scholarship program in Georgia that offers educational opportunity to more than 190,000 children with disabilities.

However, as we celebrate our successes, we must remain mindful that 2007 presents the most urgent challenges in the history of our movement. The special interests opposed to educational equality have launched massive counter-offensives, and programs in states such as Florida, Ohio, Arizona, Utah, and Washington, DC, are under serious attack. If these attacks are successful, thousands of disadvantaged children will be forced out of the best schools they have ever attended. We must not let this happen!

And so we gather here in Jersey City/Newark to look back on our recent successes and evaluate our execution. We will look forward to the challenges and opportunities that we now face, charting a *prudent but ambitious strategy for the years to come*.

If you should have any special requirements, please let our staff know, and we will be happy to assist you. Thank you so much for joining us. Enjoy the retreat!

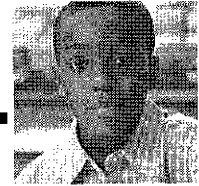
Very Sincerely,



William E. Oberndorf  
Chairman



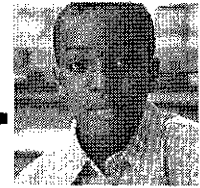
Charles R. Hokanson, Jr.  
President



# BATTLING IN THE TRENCHES

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# BATTLING IN THE TRENCHES

## Schedule for Thursday, June 7

- 10:00am – 4:30pm     **2007 Strategy Retreat: *Battling in the Trenches* Conference Registration**  
**Location:**     Riverview Boardroom
  
- 4:00pm                 **Hotel Check-in**  
**Location:**     Hyatt Regency Front Desk
  
- 4:30pm ✓              **Retreat Welcome**  
**Location:**     Hudson I, II, III  
**Speaker:**     William E. Oberndorf, Chairman, Alliance for School Choice
  
- 4:35pm – 5:45pm     ***The School Choice Imperative***  
**Location:**     Hudson I, II, III  
**Moderator:**   R. Boykin Curry, Partner, Eagle Capital Management  
**Speakers:**   ✓ Kenneth Hirsh, Retired, HBK Investments  
                      ✓ Peter Flanigan, Advisor, UBS Securities *Asset Fund Manager*  
                      ✓ Virginia Manheimer, Trustee, Hickory Foundation *Albany Program*  
                      ✓ J. Peter Simon, Co-Chair, William E. Simon and Sons  
                            *Faith Family & Education - sunset in 2029*
  
- 6:00pm – 9:00pm     **Reception/Dinner     *Together For Newark, Together For Excellence***  
**Location:**     Riverside Terrace  
**Welcome:**     William E. Oberndorf, Chairman, Alliance for School Choice  
**Presentation of the *John T. Walton Champions for Choice Award:***  
                            Christy Walton  
**Award Recipient:**  
                            Susan Mitchell, President, School Choice Wisconsin  
**Introduction:** John Kirtley, Vice Chairman, Alliance for School Choice  
**Remarks:**     The Honorable Cory Booker, Mayor of Newark  
**Close:**             William E. Oberndorf, Chairman, Alliance for School Choice

*Serial justice vs. civil rights vs. human rights*



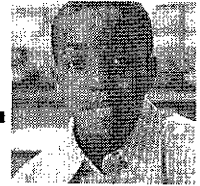
## BATTLING IN THE TRENCHES

### Schedule for Friday, June 8

- 8:00am – 9:30am**      **Breakfast**      *The State of the Alliance*  
**Location:** Hudson IV, V, VI  
**Speakers:** William E. Oberndorf, Chairman, Alliance for School Choice  
Charles R. Hokanson, Jr., President, Alliance for School Choice
- 9:45am – 12:15pm**      *Optional Tours of St. Benedict's Preparatory School and North Star Academy Charter School of Newark*  
**Note:** All conference participants interested in attending a tour please meet at the Hyatt front entrance. Shuttles will depart from the Hyatt promptly at 9:45am.
- 12:30pm – 2:00pm**      **Luncheon**      *Rising Voices*  
**Location:** Manhattan Ballroom  
**Moderator:** Dr. Howard Fuller, Chairman, Black Alliance for Educational Options  
**Speakers:** Darrell Allison, President, Parents for Educational Freedom in North Carolina  
Rabbi Yehiel M. Kalish, National Director of Government Affairs, Agudath Israel of America  
Doug Tuthill, Former President, Pinellas County Teachers Union
- 2:30pm – 5:00pm**      *On the Ground: What's Happening Across the Nation*  
**Location:** Hudson I, II, III  
**Moderator:** Scott Jensen, National Consultant for State Projects, Alliance for School Choice  
**Speakers:** Zack Dawes, Consultant for State Projects, Advocates for School Choice  
Liz (Moser) Dreckman, Director of State Outreach and Training, Alliance for School Choice  
Lori Drummer, Director of State Projects, Alliance for School Choice  
Anna Varghese Marcucio, Director of State Projects, Alliance for School Choice  
John Schilling, Chief of Staff and Director of National Projects, Alliance for School Choice  
Robert Teegarden, Director of State Projects, Alliance for School Choice



ALLIANCE FOR SCHOOL CHOICE



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## BATTLING IN THE TRENCHES

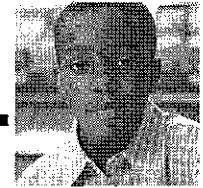
6:30pm – 9:30pm

Reception/Dinner    *Lessons From Milwaukee*

**Location:** Hudson I, II, III

**Introduction:** William E. Oberndorf, Chairman, Alliance for School Choice

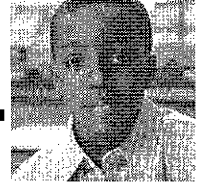
**Speaker:** Susan Mitchell, President, School Choice Wisconsin



# BATTLING IN THE TRENCHES

## Schedule for Saturday, June 9

- 8:00am – 9:15am**      **Breakfast**      *Battling on All Fronts: Bringing School Choice to New Jersey*  
**Location:**      Manhattan Ballroom  
**Introduction:** J. Peter Simon, Co-Chair, William E. Simon and Sons  
**Speaker:**      Dan Gaby, Executive Director, Excellent Education for Everyone
  
- 9:30am – 10:30am**      *Celebrating and Defending the Nation's First State-wide Universal Voucher Program*  
**Location:**      Hudson I, II, III  
**Moderator:**      Zack Dawes, Consultant for State Projects, Advocates for School Choice  
**Speakers:**      Robyn Bagley, Chairman, Parents for Choice in Education  
                                  Elisa Clements, Executive Director, Parents for Choice in Education  
                                  Doug Holmes, Former Chairman, Parents for Choice in Education
  
- 10:45am – 12:15pm**      *A Survey of Recent Research*  
**Location:**      Hudson I, II, III  
**Moderator:**      Ed Kirby, Walton Family Foundation  
**Speakers:**      Kellyanne Conway, President/CEO, the polling company, inc.  
                                  Dr. Thomas Stewart, Senior Research Associate, Georgetown University  
                                  Dr. Patrick Wolf, Professor and 21st Century Chair, University of Arkansas College of Education
  
- Noon**                      **Hotel Check-out**  
**Location:**      Hyatt Regency Front Desk
  
- 12:30pm – 2:00pm**      **Closing Luncheon**      *A Time of Promise: K-12 Education Reform in and beyond New York*  
**Location:**      Manhattan Ballroom  
**Introduction:** R. Boykin Curry, Partner, Eagle Capital Management  
**Speaker:**      The Honorable David Paterson, New York Lieutenant Governor



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# BATTLING IN THE TRENCHES

## Alliance for School Choice Board of Directors

**William E. Oberndorf, Chairman**  
SPO Partners

**John Kirtley, Vice Chairman**  
Florida Education Freedom Foundation

**Charles R. Hokanson, Jr., President**  
Alliance for School Choice

**John Fisher, Secretary**  
Pisces, Inc.

**Robert Aguirre**  
Robert Aguirre Consultants

**Steve Friess**  
Friess Associates

**Cory Booker**  
Mayor of Newark, NJ

**Rebeca Nieves Huffman**  
Hispanic CREO

**David Brennan**  
White Hat Management, LLC

**William J. Hume**  
Basic American Foods

**Anthony Colón**  
AJ Colón Consulting, LLC

**Susan Mitchell**  
School Choice Wisconsin

**Robert Cone**  
Athlon, LLC

**Carrie Penner**  
Walton Family Foundation

**Dean (Dino) Cortopassi**  
San Tomo Group

**Joseph E. Robert, Jr.**  
J.E. Robert Companies

**R. Boykin Curry**  
Eagle Capital Management

**Richard Sharp**  
Carmax, Inc.

**Peter Flanigan**  
UBS Securities, LLC

**J. Peter Simon**  
William E. Simon & Sons





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## BATTLING IN THE TRENCHES

### Advocates for School Choice Board of Directors

**William Oberndorf, Chairman**  
SPO Partners

**John Kirtley, Vice Chairman & Secretary**  
Florida Education Freedom Foundation

**Charles R. Hokanson, Jr., President**  
Advocates for School Choice

**Alex Cranberg**  
Aspect Resources, LLC

**Betsy DeVos**  
Windquest Group, Inc.

**Dr. Howard Fuller**  
Institute for the Transformation of Learning at Marquette University

**Brian W. Jones**  
College Loan Corporation

**Steve Schuck**  
Schuck Communities, Inc.



## BATTLING IN THE TRENCHES

### Speaker Biographies

#### Darrell Allison

Darrell Allison serves as president for Parents for Educational Freedom in North Carolina. Prior to this, Darrell worked in the U.S. Department of Justice, Civil Rights Division, and served as a national coalition co-director on Capitol Hill leading a successful grassroots lobbying effort in the U.S. House of Representatives. Darrell is a graduate of the University of North Carolina at Chapel Hill School of Law and North Carolina Central University. He and his family live in Charlotte, North Carolina.

#### Robyn Bagley

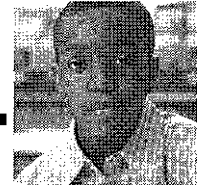
Robyn Bagley is the chairman of the board of Parents for Choice in Education (PCE), a Utah-based organization that is focused on improving Utah's K-12 educational system through the introduction of meaningful school choice. Robyn previously served as a board member for PCE. She recently ran for a seat in the Utah House of Representatives, emphasizing the importance of improving and strengthening the Utah educational system. Robyn was born and raised in Utah. She is the mother of four children ranging in age from six to 23. Her husband, Terry, is the CEO of a Utah-based software company and they have been married for 24 years.

#### The Honorable Cory Booker

The Honorable Cory A. Booker, 37, is the Mayor of Newark, New Jersey. He took the oath of office as Mayor of New Jersey's largest city on July 1, 2006 following a sweeping electoral victory. He is just the third person to govern the city since 1970. Elected with a clear mandate for change, Mayor Booker has begun work on realizing his vision for the city. He has embarked upon a bold and ambitious agenda for change that is mission-driven results-oriented. His vision is for Newark to be America's leading urban city in safety, prosperity, and the nurturing of family life. His mission for Newark is to set a national standard for urban transformation by marshalling its resources to achieve security, economic abundance, and an environment that is nurturing and empowering for individuals and families.

Mayor Booker's political career began in 1998, after serving as Staff Attorney for the Urban Justice Center and as a Program Coordinator of the Newark Youth Project. He rose to prominence by upsetting a four-term incumbent to become Newark's Central Ward Councilman. During his four years of service, Mayor Booker earned a reputation as a leader with innovative ideas and bold actions, from increasing security in public housing to building new playgrounds. For this work, he has been recognized in numerous publications, including, among others, *Time*, *Esquire* (naming him one of the country's 40 Best and Brightest in December 2002), *New Jersey Monthly* (naming him as one of New Jersey's top 40 under 40) and *Black Enterprise* in December 2005 (naming him to the Hot List, America's Most Powerful Players under 40).

In addition to being the Founder of Newark Now, Mayor Booker is a member of several boards including the Executive Committee of Yale Law School, Columbia University Teachers' College,



## BATTLING IN THE TRENCHES

BAEO, and North Star Academy. This shining star reformer took his B. A. and M. A. from Stanford University, a B. A. in Modern History at Oxford University as a Rhodes Scholar, and completed his law degree at Yale University.

### Elisa Clements

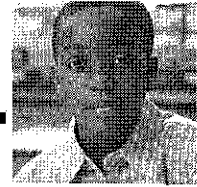
Elisa Clements is the executive director at Parents for Choice in Education (PCE), which has helped expand Utah's charter school law, create the Carson Smith Scholarship for special needs children, and most recently, enact a groundbreaking universal voucher program. Elisa attended law school, and graduated magna cum laude from Brigham Young University with Honors in English, where she also served as president of the Honors Student Advisory Council. She lives in Salt Lake City.

### Kellyanne Conway

Kellyanne Elizabeth Conway is CEO and president of the polling company™, inc. a privately-held, woman-owned corporation founded in 1995. The firm is headquartered in Washington, DC and maintains an office in New York City. Kellyanne is one of the most quoted and noted pollsters on the national scene. Among her accomplishments, she was recognized as the most accurate predictor of the 2004 elections and received The Washington Post's "Crystal Ball" award and is the co-author of *WHAT WOMEN REALLY WANT: How American Women Are Quietly Erasing Political, Racial, Class, and Religious Lines to Change the Way We Live* (Free Press, 2005). Throughout her 19-year qualitative and quantitative research career, Kellyanne has provided primary research and advice for clients in 46 of the 50 states and has directed hundreds of demographic and attitudinal survey projects for statewide and congressional political races, trade associations, and Fortune 100 companies. She has practiced law, clerked for a judge in Washington, DC, and for four years was an adjunct professor at George Washington University Law Center. Kellyanne is a *magna cum laude* graduate of Trinity College, Washington, DC, where she earned a B.A. in political science, studied at Oxford University, and was elected to Phi Beta Kappa. She holds a law degree, with honors, from George Washington University Law Center. Kellyanne (formerly "Fitzpatrick") is a native of South Jersey. She is married to George T. Conway III. They reside in New York City with their toddler twins, George Anthony and Claudia Marie.

### R. Boykin Curry IV

Boykin Curry is a partner at Eagle Capital Management, a Manhattan-based money management firm that manages investments for endowments, pension funds, and families. Previously, Boykin invested in Asia and Russia for Morgan Stanley Asset Management and for Kingdon Capital, a global hedge fund. He is a leader of various philanthropic efforts, serving as co-founder of Girls Prep, an innovative all-girls charter school, and founder of Young Friends of MTC, an organization that supports America's largest nonprofit theatre producer. Also, he has played an active role on the finance committees for Mayor Cory Booker's recent mayoral campaign and Gov. Eliot Sptizer's gubernatorial campaign. Boykin and his wife Celerie reside in Manhattan with their new son.



## BATTLING IN THE TRENCHES

### **Most Reverend Edgar M. da Cunha, S.D.V., D.D.**

The Most Rev. Edgar Moreira da Cunha, SDV, currently serves as the Auxiliary Bishop of Newark and the Regional Bishop for Essex County. He was ordained to the priesthood for the Society of Divine Vocations on March 27, 1982. After ordination, he served as Parochial Vicar at St. Michael Church (Newark) and Director of Vocations for his Congregation; Parochial Vicar at St. Nicholas Church (Palisades Park); and Vice Superior of the local community. In 1987, he became Pastor of St. Nicholas Church. In 1994, he was appointed novice master and director of the vocationary, the house of formation that the Society maintains in Florham Park, and, in 2000, he became Pastor of St. Michael Church. On June 27, 2003, his appointment as Titular Bishop of Ugres and Auxiliary Bishop of Newark was announced. He was ordained Bishop in Sacred Heart Cathedral Basilica, on September 3, 2003. On October 15, 2003, he was appointed Regional Bishop for Essex County. He is a member of the Archdiocesan Board of Consultors, Presbyteral Council, and Clergy Personnel Board; the RENEW Internal Board of Trustees; the NJCC Board of Bishops and Public Policy Committee; the USCCB Committee on the Church in Latin America; and Committee on Migration. He also serves as Episcopal Liaison to the Brazilian Apostolate (in the U.S.). He is also Vicar for Evangelization; Chairman of the Archdiocesan Evangelization Commission; and Chairman of the Executive Committee for the New Energies – Parish Transition Project.

### **Zack Dawes**

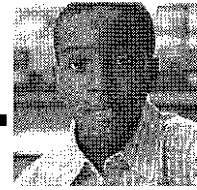
Zack Dawes is a consultant for state projects for Advocates for School Choice. He serves and assists state and local allies in advancing sound school choice policies. A Texas native, Zack managed and consulted in statewide political campaigns before transitioning to corporate, educational, and nonprofit public affairs consulting. Zack served with both of the Advocates' predecessors, American Education Reform Foundation and Children First America. Currently, he is senior consultant for All Children Matter, a 527 political organization, and he is also a consultant for Connections Academy, a virtual school provider based in Baltimore.

### **Peter Denton**

Peter Denton is the founder and chairman of E3. Also, Peter is a successful business executive who owns and manages two high-tech companies in southern New Jersey. He has turned over the direction of his companies to his managers so he can devote himself full-time to E3. Peter is a graduate of the Massachusetts Institute of Technology and the Harvard Business School.

### **Liz (Moser) Dreckman**

Liz Dreckman serves as the director of state outreach and training for the Alliance for School Choice, building relationships with likeminded organizations and grassroots support for education reform. Liz previously served as the outreach coordinator for the Institute for Justice. She also conducted education research and authored education studies and publications for the Mackinac Center for Public Policy in Michigan. Liz has an honors degree in political theory and constitutional democracy from James Madison College at Michigan State University.



## BATTLING IN THE TRENCHES

### Lori Drummer

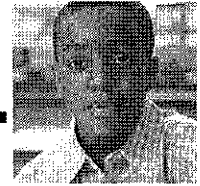
Lori Drummer serves as a director of state projects for the Alliance for School Choice, providing support and resources for state-based school choice efforts. Most recently, Lori worked at the American Legislative Exchange Council (ALEC), the nation's largest nonpartisan, individual membership association of state legislators with the mission of furthering the principles of free markets, limited government, federalism, and free enterprise. At ALEC, Lori served as the director of public affairs; previously she directed ALEC's Education Task Force, where she oversaw the development of ALEC policy related to education reform and school choice programs. Lori is the author of numerous articles on education policy and was the editor of three editions of ALEC's *Report Card on American Education*. Prior to joining ALEC, Lori worked as Legislative Aide to then-Assistant Majority Leader Stephen Buehrer in the Ohio House of Representatives. As Buehrer's aide, she worked actively with ALEC's membership in Ohio and in 2002 was honored as an ALEC Volunteer of the Year. Lori holds a B. A. from Capital University in Columbus, Ohio.

### Peter M. Flanigan

Peter M. Flanigan is an advisor of UBS Securities LLC, a New York City-based international investment banking firm. Peter was a Navy carrier pilot in World War II, and he graduated *Summa Cum Laude* from Princeton University. He joined Dillon, Read & Co. Inc., but his tenure was interrupted to serve as an economic analyst for the Economic Reconstruction Administration in the United Kingdom for two years, returning thereafter to Dillon Read. Peter served as executive director of Volunteers for the Nixon-Lodge Presidential campaign and later as deputy campaign manager of the Nixon campaign. In 1969 Flanigan left Dillon Read upon his appointment as assistant to the President of the United States under President Nixon, with White House responsibility for domestic commercial and economic matters. He was also appointed director of the Council of International Economic Policy. He returned to Dillon Read as managing director from 1975-1992. Peter is a leading supporter of K-12 Catholic education, having founded and served on the board of the Patrons Program, an initiative designed to encourage individuals to take responsibility for inner-city Catholic grammar schools in danger of being closed for financial reasons. In addition to these responsibilities, Peter serves as a board member of St. Ann's School in Harlem. In addition to his active participation in the I have a Dream Program, he founded The Student Sponsor Partners, a private voucher program which combines tuition support with one-on-one mentoring. Peter founded the Center for Education Innovation of The Manhattan Institute, which researches and implements new programs to improve education. He has been a Board Member of the Catholic University of America, Chairman of the Board of Portsmouth Abbey School, and a member of the Board of the Richard M. Nixon Library and Birthplace. He was a board member of Children First America and now serves as a founding board member of the Alliance for School Choice.

### Dr. Howard Fuller

Dr. Howard Fuller is a Distinguished Professor of Education and Founder/Director of the Institute for the Transformation of Learning at Marquette University in Milwaukee, Wisconsin. Immediately before his appointment at Marquette University, Howard served as the superintendent of



## BATTLING IN THE TRENCHES

Milwaukee Public Schools June 1991 - June 1995. Howard received his B.S. degree in Sociology from Carroll College in Waukesha, Wisconsin, in 1962; M.S.A. degree in Social Administration from Western Reserve University in Cleveland, Ohio, in 1964, and his Ph.D. in Sociological Foundations of Education from Marquette University, Milwaukee, Wisconsin in 1986. He has received numerous awards and recognition over the years, including four Honorary Doctorate Degrees. Howard is the chair of the board of the BAEO; the chair of the board of the Wisconsin Municipalities Private School Finance Commission; the chair of the board of the Alliance for Choices in Education in Milwaukee; and the chair of the board of CEO Leadership Academy. He also serves on the Board of Directors of Transcenter for Youth; the Johnson Foundation; the Joyce Foundation; School Choice Wisconsin; Advocates for School Choice; the National Alliance of Public Charter Schools; the Charter School Review Committee for the city of Milwaukee; and the Wisconsin United for Health Foundation, Inc., and he is an active member of several other local and national organizations.

### Dan Gaby

Dan Gaby is the executive director of E3. Dan has a long history in marketing communications, grassroots organizing and education. He has been in a leadership position in various reform movements, including: civil rights, environment, Vietnam War opposition, campaign finance reform, deregulation, and women's rights. He twice chaired Jimmy Carter's campaign in New Jersey and served as state citizens' chairman for three successful Democratic gubernatorial campaigns. Dan was vice chairman of the NJ State Board of Education, a trustee of Rutgers University, and a vice president of the Board of Essex County College.

### Doug Holmes

Doug Holmes spent most of his career in the telecommunications industry with MediaOne Group, a fortune 100, international telecommunications company that was sold to AT&T in 1999. At MediaOne Doug held various positions including CFO and executive vice president of strategy, corporate development and technology. Prior to his work at MediaOne, Doug was a strategy consultant with Booz Allen and Hamilton. Doug has served on several company boards including; Time Warner Entertainment, IPIX, InfoGear, and Time Warner Telecom. He has also served on multiple volunteer boards including the last six years as chairman of Parents for Choice in Education. Doug is married to Erin Toone and they are the parents of six children. Doug received his B. A. and M.A. of business administration degrees from Brigham Young University.

### Kenneth Hirsh

Ken Hirsh recently retired as a managing director of HBK Investments, a global, multi-strategy hedge fund currently managing more than \$13 billion in assets. The firm was founded in 1991 and employs approximately 300 individuals in Dallas, New York, London, Tokyo, and Hong Kong.

### Charles R. Hokanson, Jr.

Charles R. Hokanson, Jr. serves as president of the Alliance for School Choice. Prior to joining the Alliance, Charles served in senior leadership positions at the U.S. Department of Education, including as Deputy Assistant Secretary for Policy and Strategic Initiatives in the Office of



## BATTLING IN THE TRENCHES

Elementary and Secondary Education and as chief of staff in both the Office of the General Counsel and the Office of Planning, Evaluation, and Policy Development. Charles also previously served as a professional staff member to the U.S. House of Representatives Committee on Education and the Workforce, finance director and research fellow at the Thomas B. Fordham Foundation, research fellow at the Manhattan Institute, and an associate at Steptoe & Johnson LLP. He received his A.B. (*Phi Beta Kappa*) and A.M from Stanford University, his M.P.P. from the Kennedy School of Government at Harvard University, and his J.D. from Harvard Law School, where he was editor-in-chief of the *Harvard Journal of Law and Public Policy*.

### Scott Jensen

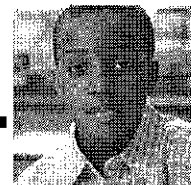
As the Alliance for School Choice's national consultant for state projects, Scott Jensen provides strategic advice to the state team in building public support for school choice around the country. Formerly the speaker of the Wisconsin State Assembly and chief of staff to Gov. Tommy Thompson, he played a crucial role in the creation, expansion, and defense of Milwaukee's pioneering school choice program. Scott received his B. A. in political science and economics from Drake University in 1982 and his master's of public policy degree at the Kennedy School of Government at Harvard University in 1984.

### Rabbi Yehiel Mark Kalish

Rabbi Mark Kalish is national director of government affairs for Agudath Israel of America. In this role, Rabbi Kalish heads legislative and advocacy activities for Orthodox Jewish communities in the United States. Rabbi Kalish was appointed to national director in November of 2006. Until then, he served as midwest regional director, a position he founded in February 2002. Before that point, thousands of Orthodox Jewish citizens throughout the Midwest had no consistent voice to represent them in the Midwestern state capitols. Today, Rabbi Kalish regularly appears before Senate and House committees, presenting the Orthodox Jewish position on issues such as school choice, abortion, embryonic stem-cell research, civil and economic development, safety, religious freedom and more. Rabbi Kalish also oversees marketing and development for Agudath Israel of America in the Midwest and Agudath Israel of Illinois. Since arriving in 2002, he helped Agudath Israel raise over two million dollars in corporate and personal donations. Rabbi Kalish received his rabbinic ordination—and his B.A. in Talmudic Studies—from Hebrew Theological College in Skokie, Illinois. He is currently working towards his Ph.D. in Non-profit Management and Leadership through Northeastern Illinois University. Rabbi Kalish lives in Chicago with his wife Shulamis and five children.

### Ed Kirby

Ed Kirby manages the Walton Family Foundation's work in the school choice movement. Before joining the Foundation, Ed served on, and then directed, the public sector team that launched and managed the Massachusetts charter school initiative during its start-up years. He began his career as a high school English teacher and track/cross-country coach.



## BATTLING IN THE TRENCHES

### John F. Kirtley

John F. Kirtley is currently vice chairman of the Alliance for School Choice. From September 2002 to December 2003, he was president of Children First America and was also a director of the American Education Reform Council. John is the co-founder of FCP Investors, a Tampa based venture capital firm that invests on behalf of endowment funds and other clients. Prior to starting FCP in 1988, he was a general partner in Chemical Bank's venture capital operations. He holds a B. S. from the University of Virginia. John has been active in school choice since 1998, when he founded the Children's Scholarship Fund of Tampa Bay and successfully attracted 12,000 applications for 700 private scholarships. Since then, he has worked to help pass, implement, and defend taxpayer-funded school choice programs in Florida, which now serve more than 17,000 low income students. He is the founder of the Florida School Choice Fund which has helped expand the capacity of private schools in low income areas. In addition, John helped create the Florida Education Freedom Foundation and the Florida Association of Scholarship Funding Organizations.

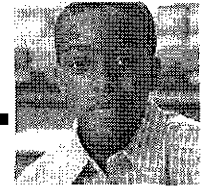
### Rev. Edwin D. Leahy, O.S.B.

Rev. Edwin D. Leahy, O.S.B., became the 23<sup>rd</sup> Headmaster of St. Benedict's Prep in 1972. He earned a B.A. in philosophy from Seton Hall University in 1968 and a Master's in Divinity with distinction in 1975 from the Woodstock College at Union Theological Seminary, New York. Father Edwin began his work at St. Benedict's Prep in 1967, teaching biology and religion and assisting with the wrestling and football teams. Following the suspension of operations of St. Benedict's in 1972, Father Edwin was named to direct the efforts of monks, interested parents, alumni, and friends to re-open the School as soon as was feasible. Under his direction, St. Benedict's re-opened in 1973 with 89 students and 14 faculty members. Father Edwin is president of the Board of the Essex County Vocational and Technical Schools and served on the Board of St. Vincent College, Latrobe, Pennsylvania. In 2006-07 he was a Gustav Heningburg Civic Fellow with the Institute on Ethnicity, Culture and the Modern Experience at Rutgers-Newark. Father Edwin is also a member of the Newark Alliance. Among his most recent honors, Father Edwin was recently awarded honorary "Doctor of Humane Letters" degrees from two New Jersey institutions -- Rutgers University and St. Peter's College.

### Virginia Manheimer

Virginia Manheimer is an active supporter of a variety of social, historical preservation, and educational causes. She is a founder of The Club for Growth, a trustee of the Hickory Foundation, and an associate trustee of Media Research Institute. In addition, she is chairman of The Foundation for Educational Reform and Accountability, a nonprofit, nonpartisan educational policy research organization headquartered in Clifton Park, N.Y. In 1997, Virginia engineered a compelling experiment in educational opportunity when she offered to finance private-school scholarships for every student in a troubled Albany, NY elementary school. More than a quarter of the pupils at Giffen Memorial Elementary School accepted her offer. This resulted in the Albany Board of Education making changes at Giffen in an attempt to improve this public school. Virginia resides in New Jersey.





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**BATTLING IN THE TRENCHES****Anna Varghese Marcucio**

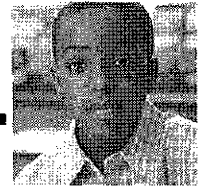
Anna Varghese Marcucio serves as a director of state projects for the Alliance for School Choice, providing support and resources for state-based school choice efforts. Prior to joining the Alliance, Anna was manager of education investments at Fight For Children in Washington, DC. There she managed the District of Columbia Family Education Network and commissioned a comprehensive study on the DC charter school movement. Prior to joining Fight For Children, Anna was vice president for external affairs at the Center for Education Reform (CER). In this capacity, Anna managed all the grassroots and legislative initiatives around the country. Anna has an extensive background in charter school and school choice policy and worked in direct partnership with policymakers, school-based reformers, state education reform groups, and parents to develop common sense reform initiatives to provide high quality educational options for all children. Prior to joining CER, Anna worked in the national office of Teach for America in New York City. Anna has a B. A. in political science from the University of Connecticut and a M.A. in public policy from American University in Washington, DC.

**Susan Mitchell**

Susan Mitchell is the president of School Choice Wisconsin, a 501(c)(3) organization, and Vice-Chair of the Alliance for Choices in Education, a 501(c)(4). Founded by Susan and Dr. Howard Fuller, the two Milwaukee-based organizations serve as the strategic arm of the school choice coalition in Wisconsin, working to expand and protect programs that offer educational choices to parents. Susan has worked for more than 15 years to advance parent choice in Wisconsin and nationally. She previously served as president of the American Education Reform Council. Currently, she is a member of the Alliance for School Choice board and chairs its Policy Committee. Susan also has served as special assistant for strategy and budget development to Dr. Howard Fuller when he served as superintendent of Milwaukee Public Schools and has authored several studies and articles on education. She holds degrees from Lawrence University and the University of Wisconsin-Madison. Susan was a journalist at *The Wall Street Journal* and other newspapers. She also has held leadership positions in government and private business, including Commissioner of Insurance for the State of Wisconsin; secretary of the Wisconsin Department of Regulation and Licensing; executive vice president of Milwaukee Mutual Insurance Company; and president of General Life Insurance Company, a Teledyne subsidiary. Susan and her husband, George, live in Milwaukee, WI.

**William E. Oberndorf**

William E. Oberndorf (Bill) is a managing director of SPO Partners & Co., an investment firm that specializes in the acquisition of public and private equity positions with a value orientation. Bill received a B.A. from Williams College in 1975, and joined SPO Partners' predecessor company, San Francisco Partners, upon earning an M.B.A. from the Stanford Graduate School of Business in 1978. He is a director of DMB Real Estate, Hotel Equity Funds, ProQuest Company, Rosewood Hotels and Resorts, and director emeritus of Plum Creek Timber Co. Bill is board chair of the Alliance and Advocates for School Choice. He also serves as a trustee of The Thatcher School in Ojai, California; University School in Cleveland, Ohio; and Williams College in Williamstown, Massachusetts. In addition, Bill serves on the UCSF Real Estate Committee. He is a past trustee of the Bay Area



## BATTLING IN THE TRENCHES

Discovery Museum, San Francisco Day School, and University High School in San Francisco. Bill lives in San Francisco with his wife, Susan, and their two children.

### **The Honorable David A. Paterson**

David Paterson was elected New York's lieutenant governor on November 7, 2006. Elected to represent Harlem in the New York State Senate in 1985, Lt. Gov. Paterson has demanded and achieved change at every level, not simply by what he stands for but by who he is. In 2002, he was elected minority leader of the New York State Senate, the first non-white legislative leader in New York's history. In 2004 in Boston, he became the first visually impaired person to address a Democratic National Convention. And 2006 saw him make history again by being elected New York's first African-American lieutenant governor.

As New York State Senate minority leader, Lt. Gov. Paterson led the charge on several crucial issues for New York's future, proposing legislation for a \$1 billion voter-approved stem cell research initiative, demanding a statewide alternative energy strategy, insisting on strong action to fight against domestic violence, and serving as the primary champion for minority- and women-owned businesses in New York. As a result, Governor Spitzer asked him to continue to lead New York State on these issues as lieutenant governor.

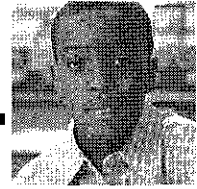
Lt. Gov. Paterson, who is legally blind, is also nationally recognized as a leading advocate for the visually and physically impaired. A graduate of Columbia University and Hofstra Law School, he also currently serves as an adjunct professor at Columbia's School for International and Public Affairs. Lt. Gov. Paterson lives in Harlem with his wife, Michelle, and their two children, Ashley and Alex. He is the son of Basil Paterson, the first non-white secretary of state of New York and the first African-American vice-chair of the national Democratic Party.

### **The Honorable Dana Rone**

Dana Rone is responsible for E3's interface with public housing residents and urban school board members. She was elected Central Ward Representative of the Newark City Council, having run as a member of the Booker Team in the 2006 municipal elections. Council Member Rone is a fierce advocate for school choice as has recently engineered a unanimous resolution from the Newark City Council in support of The Urban Schools Scholarship Act.

### **John Schilling**

For 20 years, John Schilling has been a successful public policy professional and executive at the state and federal levels. During his early career, John was deeply involved in elective politics as a former director of research and opposition research for the Republican National Committee. He also worked in senior legislative positions for two United States Congressmen. John has worked exclusively on K-12 education reform since 1997. He served four years as associate state superintendent and chief of policy & planning at the Arizona Department of Education. During this time, he helped State Superintendent Lisa Graham Keegan usher in bold education reforms including tuition tax credits, expansion of the state's charter school law, and an accountability



## BATTLING IN THE TRENCHES

system that tracked student achievement and education spending. John returned to Washington, DC in 2001 to become chief of staff for Education Leaders Council (ELC). In 2003, John formed a consulting business and his clients included Arnold Schwarzenegger's 2003 gubernatorial campaign and the Educational Testing Service (ETS). In January 2007, John accepted a position as director of national projects for the Alliance, and in May 2007, following the Alliance's relocation to Washington, DC, he was named the organization's chief of staff.

### J. Peter Simon

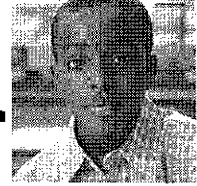
J. Peter Simon is co-chairman of William E. Simon and Sons, a global merchant bank headquartered in Morristown, NJ, that he co-founded along with his late father, former Treasury Secretary William E. Simon, and his brother Bill Simon, Jr. Peter currently has served on the board of several local and national initiatives, including AimNet Solutions and Puck Holdings, which controls the New Jersey Devils. He is an alternate member of the Charles Hayden Foundation, a trustee of the Richard Nixon Library and Birthplace Foundation, Lafayette College, Covenant House NJ, and co-chairman of the William E. Simon Foundation.

### Dr. Thomas Stewart

Dr. Thomas Stewart is a senior research associate for the School Choice Demonstration Project and a managing partner with Symphonic Strategies, providing educational research, evaluation, and program design support services. His research, consulting, and other professional activities have focused on improving the quality of life for under resourced children and families. He has worked extensively with parent, education, and community-based organizations in the District of Columbia and elsewhere. Tom has held senior executive or board member positions with a number of groups that provide direct services to students and families, for example, BAEO, Edison Schools, LearnNow, National Black Graduate Student Association, Parents International, and the World Organization of Resilient Kids. In 1997, Tom was the founding executive director of the SEED (School for Educational Evolution and Development) Public Charter School of Washington, DC, a college and professional preparatory residential public charter school. He received his B.A. with honors in 1987 from the University of the District of Columbia, and his Ph.D. in Government from Harvard University in 1994. Upon becoming the only graduate from the University of the District of Columbia to receive a Ph.D. from Harvard, he was awarded a post-doctoral fellowship from the Harvard Society of Fellows.

### Robert A. Teegarden

Robert A. Teegarden serves as a director of state projects for the Alliance for School Choice, providing support and resources for state-based school choice efforts. Most recently, Robert was the associate for education at the California Catholic Conference. There he was responsible for the equity of access issues facing private schools in the state with the No Child Left Behind Act, as well as public policy advocacy as a lobbyist for the Conference with the state legislature. During that time he was the president of the California Association of Private School Organizations (CAPSO) and the chair of the Federal Assistance Advisory Council of the United States Catholic Conference in Washington DC. Prior to his public policy career, Robert spent more than 20 years as a K-8 and 9-12



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## BATTLING IN THE TRENCHES

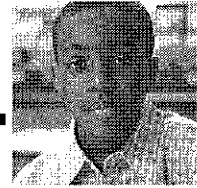
Catholic school teacher and principal. He received his B.A. from St. Mary's College of California and M.A. in Education from the University of San Francisco.

### Doug Tuthill

Doug Tuthill is a consultant in several K-12 projects, including acting as an executive coach for the Pinellas County superintendent and senior management team. Doug was the president of the Pinellas Classroom Teachers Union for several years. He also served on the state commission that developed Florida's current standards and assessment system. Doug has also been CEO of Learning Cooperative, Inc., an educational consulting firm that worked primarily with large urban school districts, and chief operating officer for Creative Loafing, a media company with \$27 million in revenues.

### Dr. Patrick J. Wolf

Dr. Patrick J. Wolf is Professor of Education Reform and 21st Century Chair in School Choice at the University of Arkansas in Fayetteville. He is principal investigator of the School Choice Demonstration Project and is leading a national research team engaged in comprehensive evaluations of the DC Opportunity Scholarship Program and the Milwaukee Parental Choice Program. Patrick has authored, co-authored, or co-edited two books and more than two dozen articles and book chapters on school choice, special education, public management, and campaign finance. During his career he has completed studies using experimental, quasi-experimental, meta-analytical, and qualitative research methodologies. A 1987 graduate of the University of St. Thomas (St. Paul, MN), he received his doctorate in political science from Harvard in 1995.



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## BATTLING IN THE TRENCHES

### Important Phone Numbers

Hyatt Regency Main: (201) 469-1234

Hyatt Regency Concierge: (201) 469-4780

Hyatt Regency Business Center: (201) 469-4773

- Open 24 hours
- A business center representative is present Monday thru Friday 7am to 7pm and Saturday 7am to 5pm.

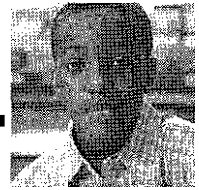
Baby Sitters Guild: (212) 682-0227

- Off-site baby sitting provider
- Open from 9am to 9pm

Alliance for School Choice Staff:

- Crystal Corriveau (480) 262-7708
- Cheryl Hillen (860) 428-5190
- Kathy Krueger (602) 677-0491
- Liz Moser (703) 597-8357
- John Schoenig (602) 615-6094

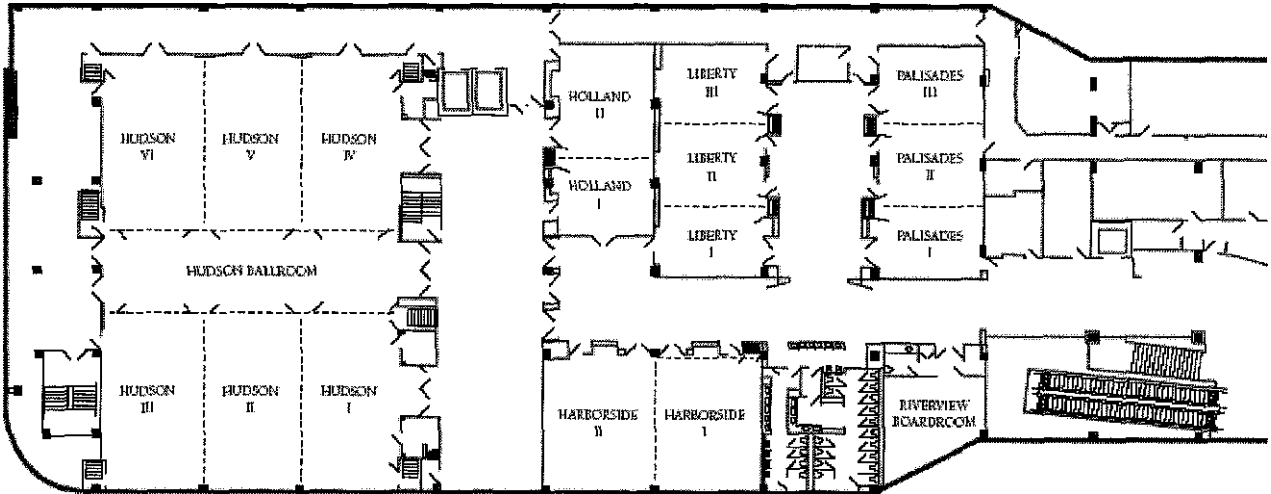
As a reminder, the Alliance hospitality suite is in the Riverview Boardroom located on the third floor.



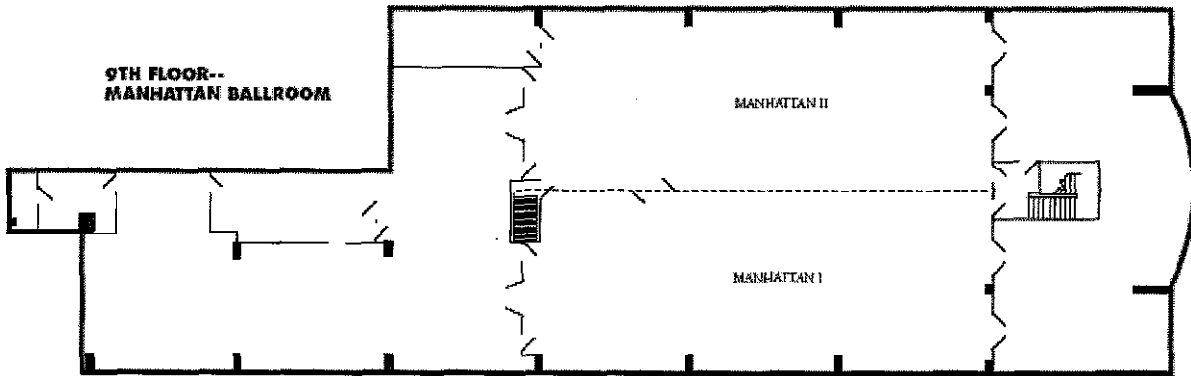
# BATTLING IN THE TRENCHES

## Hyatt Regency Meeting Rooms

### 3RD FLOOR

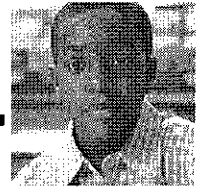


### 9TH FLOOR-- MANHATTAN BALLROOM





ALLIANCE FOR SCHOOL CHOICE



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# BATTLING IN THE TRENCHES

Notes



ALLIANCE FOR SCHOOL CHOICE



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# BATTLING IN THE TRENCHES

Notes