

What's in a Name? The Corporate Branding of America's Schools

The Fifth Annual Report on Trends in Schoolhouse Commercialism, Year 2001-2002

Appendix A

Sources, Search Strategies, and Search Terms

Sources

Popular Press Citations

To compile this data, the Lexis-Nexis “News-All Files” Library was used. According to the Lexis-Nexis Directory of Online Services, the “News-All Files” Library contains a wide selection of “newspapers, magazines, journals, newsletters, wire services and broadcast transcripts.”

Business Press Citations

To obtain the business press citations, the Lexis-Nexis “Business and Finance” Library “All News” File was used. The Business and Finance Library contains a wide variety of sources that provide business and finance news including business journals and investments and merger acquisition news sources. (Lexis-Nexis Directory of Online Services)

Advertising/Marketing Press Citations

The Lexis-Nexis “Market and Industry” Library “Markets and Industry News” File was used to compile this data. This library includes “an extensive variety of

publications covering advertising, marketing, market research, public relations, sales and selling, promotions, consumer attitudes and behaviors, demographics, product announcements and reviews.” (Lexis-Nexis Directory of Online Services).

Education Press Citations

To compile this data, the Education Abstracts (6/1983+) was used. The content of the Education Abstracts is provided by H.W. Wilson Education Index, which according to the vendor description on the company’s web site, indexes more than 400 English-language periodicals and yearbooks, covering all levels and aspects of education.

Search Strategies

In the development of the search terms used in this report, a number of different words and phrases were tested for their value in identifying relevant citations. The terms used to retrieve the citations described in this report are groups of words broad enough to include the various permutations of an idea (such as in Search 2, “exclusive sale” or “exclusive deal” or “exclusive agreement,” etc.) but narrow enough not to pull up irrelevant citations.

An example of the evolution of one set of search terms, those for Sponsored Educational Materials (Search 5), will illustrate the process. At first, the following set was used when conducting searches in the Education Press:

sponsored lesson or sponsored material* or sponsored curricul! or sponsored teaching aid

After reviewing the initial citations, the list was expanded to include a few other common variations of the terms, such as adding an asterisk to “sponsored lesson*” (the

asterisk indicating that any variations on the word ending should be counted, i.e., “lesson” or “lessons”) and adding the phrase “sponsored education* material*.” It was also noted that Education Index has a subject heading for “sponsored teaching aids,” but not “sponsored teaching aid,” so an asterisk was added to that phrase, to get “aid” and “aids,” thereby increasing the number of relevant citations found.

In conducting searches for the 1999-2000 report in the Lexis-Nexis databases, it was discovered that previous researchers made an error in the use of a wild card operator, the asterisk. In previous years’ searches, it was assumed that, when used in place of letters in a search term, the asterisk represented any number of letters. For example, a search term such as “advertis*” was assumed to return all words beginning with “advertis” including “advertisement,” “advertising,” etc. However, in Lexis-Nexis databases, the asterisk may only represent a single letter (meaning that in the example just mentioned only the word “advertise” is possible but not advertisement); to represent more than one letter, an exclamation point must be used. Test searches were conducted to determine how significant this error was to the results, and it was decided that the results were not substantially changed. The searches most affected were Exclusive Agreements and Sponsored Educational Materials; in both cases, the ultimate result of the error was to understate slightly the prevalence of the activity in schools. The error was corrected in the 1999-2000 search terms and has not been repeated.

Because the arena of schoolhouse commercialism is rapidly expanding, several additions to the search terms used in the first CACE trends report (published in 1998) were considered for the present report. Those additions that were considered include recently founded companies involved in one of the areas of schoolhouse commercialism,

updated names for existing companies, new marketing programs aimed at schools, and additional categories of activity.

Search Terms

In the first annual report on schoolhouse commercializing trends (published in 1998), the calendar year (1 January through 31 December) was used. In 1999, the time period covered by the annual report was shifted to a 1 July through 30 June year to allow for the data in the report to be as current as possible at the start of the school year.

Terms for Popular, Business and Advertising/Marketing Presses

Search One: Sponsored Activities 2000-2001

((corporate sponsor!) or (school business relationship) or (sponsor! school activit! or sponsor! school program* or sponsor! school event*) or (School Properties Inc) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school*)) and date is mm/yyyy

Search Term Modifications 2001-2002

((corporate sponsor!) or (school business relationship) or (sponsor! school activit! or sponsor! school program or sponsor! school event) or (School Properties Inc) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school)) and date is mm/yyyy

Explanation: The asterisk, a wild card operator used to retrieve plurals of common nouns such as event, program or school, was removed.

Search Two: Exclusive Agreements 2000-2001

(DD Marketing) or (exclusive sale* or exclusive contract* or exclusive deal* or exclusive agreement* or exclusive partner! or exclusive pour! right or exclusive soft drink agreement* or exclusive sneaker agreement* or exclusive sport* apparel agreement*) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school*) and date is mm/yyyy

Search Term Modifications 2001-2002

(DD Marketing) or (exclusive sale or exclusive contract or exclusive deal or exclusive agreement or exclusive partner! or exclusive pour! right or exclusive soft drink agreement or exclusive sneaker agreement or exclusive sport apparel agreement) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school) and date is mm/yyyy

Explanation: The asterisk, a wild card operator used to retrieve plurals of common nouns such as event, program or school, was removed.

Search Three: Incentive Programs 2000-2001

(incentive program*) or (Pizza Hut and Book It!) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school*) and date is mm/yyyy

Search Term Modifications 2001-2002

(incentive program) or (Pizza Hut and Book It!) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school) and date is mm/yyyy

Explanation: The asterisk, a wild card operator used to retrieve plurals of common nouns such as event, program or school, was removed.

Search Four: Appropriation of Space 2000-2001

(CAPS(Cover w/1 Concepts) or CAPS(School Marketing Partners) or CAPS(Planet Report) or (advertis! w/3 (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school*) and not (position* or job* or vacanc!)) and date is mm/yyyy

Search Term Modifications 2001-2002

(CAPS(Cover w/1 Concepts) or CAPS(School Marketing Partners) or CAPS(Planet Report) or (advertis! w/3 (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school) and not (position or job or vacanc! or **Living Planet Report**)) and date is mm/yyyy

Explanation: The asterisk, a wild card operator used to retrieve plurals of common nouns such as event, program or school, was removed. Living Planet Report is a document that reports on Earth's natural ecosystems.

Search Five: Sponsored Educational Materials 2000-2001

(sponsor! Education! Material*) or (sponsor! Teaching aid*) or (corporate sponsor! Material*) or (sponsor! Curricul!) or (education kit*) and (school* or classroom*) and date is mm/yyyy

Search Term Modifications 2001-2002

(sponsor! Education! Material) or (sponsor! Teaching aid) or (corporate sponsor! Material) or (sponsor! Curricul!) or (education kit) and (school or classroom) and date is mm/yyyy

Explanation: The asterisk, a wild card operator used to retrieve plurals of common nouns such as event, program or school, was removed.

Search Six: Electronic Marketing 2000-2001

(Channel One) or (Star Broadcasting) or (Family Education Network) or (ZapMe) or (Youth News Network) or (YNN) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school*) and date is mm/yyyy

Search Term Modifications 2001-2002

(Channel One) or (Star Broadcasting) or (Family Education Network) or (ZapMe) or (Youth News Network) or (YNN) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school) and date is mm/yyyy

Explanation: The asterisk, a wild card operator used to retrieve plurals of common nouns such as event, program or school, was removed.

Search Seven: Privatization 2000-2001

CAPS((Advantage Schools) or (Beacon Education! Management) or (Charter Schools Administrative Services) or (Charter Schools USA) or (Crawford First Education) or (Designs for Learning) or (Edison Schools) or (Edison Project) or (Excel Education Centers) or (Helicon Associates) or (Leona Group) or (Mosaica Education) or (National Heritage Academies) or (SABIS Educational Systems) or (Tesseract Group) or (White Hat Management)) and date is mm/yyyy

Search Term Modifications 2001-2002

CAPS((Advantage Schools) or (Beacon Education! Management) or (Charter Schools Administrative Services) or (Charter Schools USA) or (Crawford First Education) or (Designs for Learning) or (Edison Schools) or (Edison Project) or (Excel Education Centers) or (Helicon Associates) or (Leona Group) or (Mosaica Education) or (National Heritage Academies) or (SABIS Educational Systems) or (Tesseract Group) or (White Hat Management or **Chancellor Academies or Nobel Learning Communit!)) and not (Golf Advantage School) and date is mm/yyyy**

Explanation: Chancellor Academies and Nobel Learning Communities were added because they are two Education Management Organizations that manage four or more schools. Golf Advantage School is a school that teaches how to play golf.

Search Eight: Fundraising 2000-2001

(Apples for the Students) or (Campbell's Labels for Education) or (Box Tops for Education) or ((grocery or supermarket or food store or cash register receipt and redeem*) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school*)) or (school* fundrais!) and date is mm/yyyy

Search Term Modifications 2001-2002

(Apples for the Students) or (Campbell's Labels for Education) or (Box Tops for Education) or ((grocery or supermarket or food store or cash register receipt and redeem) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school)) or (school fundrais!) and date is mm/yyyy

Explanation: The asterisk, a wild card operator used to retrieve plurals of common nouns such as event, program or school, was removed.

Terms for the Education Press

To search the Education Abstracts (6/1983+), the following terms were used. The terms vary somewhat from those used in the other three presses because Education Index searches on a set standard Library of Congress of subject headings. In addition, due to the

fact that the database is already limited to articles on the topic of education, the use of limiters such as “educational” or “school” is often not necessary.

Furthermore, the Education Index only permits searches with calendar-year date restrictions. To determine which articles were published in the 2001-2002 school year, searches for the full 2001 and 2002 calendar years were conducted and then the citations were sorted manually into the 1 July 2001 – 30 June 2002 time period.

Search One: Sponsored Activities

((School Properties Inc) or (corporate sponsored) or (corporate sponsorship)) not (college* or universit*) and (py=xxxx)

Search Two: Exclusive Agreements

((sneaker* or Reebok or Nike or Adidas or athletic wear or athletic apparel or sports wear or sports apparel) and school*) not (college* or universit*) and (py=xxxx)

and

((Coca Cola Company) or (PepsiCo Inc) or (business and sports) or (beverage industry) and not (college* or universit*)) and (py=xxxx)

Search Three: Incentive Programs

((incentive program*) or (Pizza Hut and Book It!)) and (py=xxxx)

Search Four: Appropriation of Space

((Cover Concepts) or (School Marketing Partners) or (Planet Report) or (advertis* and school*) not (Channel One)) and (py=xxxx)

and

(propaganda and school*) and (py=xxxx)

Search Five: Sponsored Educational Materials

((sponsored education* material* or sponsored teaching aid*) or (sponsored lesson* or sponsored curricul*)) and (py=xxxx)

Search Six: Electronic Marketing

((Channel One or YNN or Youth News Network or Family Education Network or ZapMe or Star Broadcasting)) and (py=xxxx)

Search Seven: Privatization

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

Search Eight: Fundraising

((Apples for the Students) or (Campbell's Labels for Education) or (Box Tops for Education) or (grocery or supermarket or food store or cash register receipt and redeem*) or (School* fundrais!)) and (py=xxxx)

and

(money raising campaign*) and (py=xxxx)

Appendix B

Search Term Changes For 2002-2003 Trends Report

The changes made to the search terms of the 2002-2003 Trends Report are as follows:

Terms for Popular, Business and Advertising/Marketing Presses

Category One: Sponsorship

Search terms used in 2001-2002

((corporate sponsor!) or (school business relationship) or (sponsor! school activit! or sponsor! school program or sponsor! school event) or (School Properties Inc) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school)

Search terms used in 2002-2003

((corporate sponsor!) or (school business relationship) or (sponsor! school activit! or sponsor! school program or sponsor! school event) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school)

Explanation: The search term “School Properties, Inc” was removed from the template of search terms because it did not yield any relevant articles in the searches done in this category in the 2001-2002 report. In addition, a search for this name was conducted in the Google search engine, which retrieved no relevant information regarding this company.

Category Two: Exclusive Agreements

Search terms used in 2001-2002

(DD Marketing) or (exclusive sale or exclusive contract or exclusive deal or exclusive agreement or exclusive partner! or exclusive pour! right or exclusive soft drink agreement or exclusive sneaker agreement or exclusive sport apparel agreement) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school).

Search terms used in 2002-2003

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

Explanation: Several names of companies that have been identified to contract exclusive agreements with schools were added to this year's report.

Category Three: Incentive Programs

Search terms used in 2001-2002

(incentive program) or (Pizza Hut and Book It!) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school).

Search terms used in 2002-2003

(incentive program) or (Pizza Hut and Book It!) or (NBA's Read to Achieve) or (Verizon Reads) or (Papa John's Scholar) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school).

Explanation: The terms "NBA's Read to Achieve" and "Verizon Reads" were added to the search terms in this category as they were identified in the searches done for the 2001-2002 Trends Report as programs with a regional or national scope that yielded relevant hits that related literacy in schools to incentive programs sponsored by these two corporations. The Papa John's Scholar Program, which rewards academic performance with \$1,000 awards, has also been added to the search terms.

Category Four: Appropriation of Space

Search terms used in 2001-2002

(CAPS (Cover w/1 Concepts) or CAPS (School Marketing Partners) or CAPS (Planet Report) or (advertis! W/3 (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school) and not (position or job or vacanc!))

Search terms used in 2002-2003

(CAPS (Cover w/1 Concepts) or CAPS (School Marketing Partners) or CAPS (Planet Report) or (naming right) or (advertis! W/3 (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school) and not (position or job or vacanc!))

Explanation: The term “naming right” generated additional relevant hits related to the use of school space by several corporations; thus, it was added to the search term template for this category.

Category Five: Sponsored Educational Materials

Search terms used in 2001-2002

(sponsor! education! material) or (sponsor! teaching aid) or (corporate sponsor! material) or (sponsor! curricul!) or (education kit) and (school or classroom)

Search terms used in 2002-2003

(sponsor! education! material) or (sponsor! teaching aid) or (corporate sponsor! material) or (sponsor! curricul!) or (education kit) or (Lifetime Learning System) or (Scholastic Inc) or (Science Scope) or (Learning Enrichment Inc) or (Mazer Corp!) and (school or classroom)

Explanation: Lifetime Learning System, Scholastic, Inc., Science Scope, Learning Enrichment, Inc., and Mazer Corp. were identified in the 2001-2002 searches as major companies that produce educational materials and market their products to schools; therefore, all these companies were added to the search term template for this category.

Category Six: Electronic Marketing

Search terms used in 2001-2002

(Channel One) or (Star Broadcasting) or (Learning Network) or (ZapMe) or (Youth News Network) or (YNN) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school)

Search terms used in 2002-2003

(Channel One) or (Learning Network) or (Cable in Classroom) or (CIC) or (Ciconline) or (NCTA) or (National Cable & Telecommunications Association) and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school)

Explanation: The terms “Star Broadcasting” and “Youth News Network” were removed from the search terms template for this category because they did not yield one single relevant hit in the searches done for the 2001-2002 report. In addition, it was noted in a Toronto Star newspaper article in January 2001 that Youth News Network is phasing out of schools. The company ZapMe was also removed as a search term because this company stopped operating two years ago. On the other hand, the National Cable & Telecommunications Association’s program, Cable in the Classroom, has been added. Cable in The Classroom is a consortium that harnesses the power of cable to help teachers and market cable companies to schools.

Category Seven: Privatization

Search terms used in 2001-2002

CAPS ((Advantage Schools) or (Beacon Education! Management) or (Charter Schools Administrative Services) or (Charter Schools USA) or (Crawford First Education) or (Designs for Learning) or (Edison Schools) or (Edison Project) or (Excel Education Centers) or (Helicon Associates) or (Leona Group) or (Mosaica Education) or (National Heritage Academies) or (SABIS Educational Systems) or (Tesseract Group) or (White

Hat Management) or (Nobel Learning Communit!) or (Chancellor Academies) and not (Golf Advantage School))

Search terms used in 2002-2003

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

Explanation: Education Management Organizations (EMO's) that manage four or more schools were included. In addition, the names of cyber schools were also added to the search terms of this category. Advantage Schools, Crawford First Education, and the TesseractT Group have either gone out of business or no longer operate under the same name; thus, they were removed from the list of search terms.

Category Eight: Fundraising

Search terms used in 2001-2002

(Apples for the Students) or (Campbell's Labels for Education) or (Box Tops for Education) or ((grocery or supermarket or food store or cash register receipt and redeem)

and (primary or elementary or grammar or intermediate or junior or middle or secondary or high w/1 school)) or (school fundrais!)

Search terms used in 2002-2003

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

Explanation: In the 2002-2003 report, nine additional school fundraising programs with regional or national focus have been added to the list of search terms for this category.

Terms for the Education Press

Category Seven: Privatization

Search terms used in 2001-2002

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

Search terms used in 2002-2003

((Advantage Schools) or (Beacon Education Management) or (Charter Schools Administrative Services) or (Charter Schools USA) or (Crawford First Education) or (Designs for Learning) or (Edison Schools) or (Edison Project) or (Excel Education Center) or (Helicon Associates) or (Leona Group) or (Mosaica Education) or (National Heritage Academies) or (SABIS Educational Systems) or (Tesseract Group) or (White Hat Management) or (for-profit) or (privatization) not (higher education)) and (py=xxxx)

Explanation: A test search, including the terms “for-profit” and “privatization,” was conducted for 2001-2002 which yielded 26 additional hits representing a 163 percent increase in this category; therefore, those terms were added to the search term template for this category. The delimiter “not higher education” was also used to keep the relevancy of hits to K-12 education.