

LEVERAGING THE STATE: PRIVATE MONEY AND THE DEVELOPMENT OF PUBLIC EDUCATION FOR BLACKS

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This study analyses African Americans' success in getting the state to improve access to a basic social right—the right to a public education—in the late nineteenth- and early twentieth-century South. During this period, Southern blacks were deprived of the right to vote and many of their civil rights. We find that the loss of political and civil rights influenced the means that blacks could use to affect policy, and it limited the policy objectives they could achieve; but it did not render them unable to affect policy. After disfranchisement, black communities, in an alliance with Northern philanthropists, modified and vastly extended a strategy we call “leveraging the state”—a strategy that had been used successfully by both black communities and white communities in the nineteenth century to increase access to public elementary education. This strategy involved using private funds in combination with partial public funding to directly establish new public schools and then negotiating a state commitment to ongoing support of the new public schools. Such a strategy cannot secure political or civil rights, but it can and did secure social rights—although at a high financial price for the challengers and their allies.

ARE challenger groups—those at the bottom of the stratification system, with little or no formal political power—able to influence state policies concerning social provision? If so, how? Several recent stud-

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ies address these questions. For example, Skocpol (1992) shows that women's groups were able to affect federal policy concerning mothers' pensions before they had the vote; Quadagno (1992) demonstrates that civil rights organizations influenced the development of federal employment policy in the 1960s; Clemens (1997) shows that farm-

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ers' groups and women were more successful than organized labor in affecting state policy development in the early twentieth century, despite labor's seemingly stronger political position; and Amenta (1998) accords a limited but sometimes important role to various challenger groups (some of whom were marginal political actors) in the development of public spending programs in the New Deal.

We contribute to the understanding of the role of challenger groups in the development of state social programs by investigating the development of public education for African Americans in the South in the late nineteenth and early twentieth centuries, focusing on North Carolina and Alabama. We address two main questions. First, under what conditions were African Americans able to secure greater access to state-provided education? Second, what strategies did they use to do so? Many scholars argue that those with greater political rights, especially the vote, and civil rights, such as freedom of mobility, free speech, and the right to justice, have greater access to social rights (Marshall 1950; also see Hicks, Misra, and Ng 1995; Walters, James, and McCammon 1997). The timing of change in access to public schooling in the United States supports this claim. Publicly funded and controlled systems of education were one of the earliest social benefits extended to the masses, and the relatively early development of mass education in the United States, compared with other Western countries, may be a result of the relatively early extension of the franchise to the (male) working class (Katznelson and Weir 1985; Rubinson 1986).¹ Many scholars attribute the vast in-

¹ Not only was education an early social right, it remained among the most *important* social benefits provided by the state—albeit at the local and state levels—until the social assistance and social insurance programs of the early twentieth century were instituted. Defining education as a key element of American social provision raises the question of whether it is part of “the welfare state.” Locating education within the welfare state is consistent with a large body of theoretical literature that sees social provision, including public education, and the guarantee of a minimum standard of well-being as the core of the welfare state (e.g., Flora and Heidenheimer 1981;

crease in racial inequality in education in the American South in the early twentieth century to blacks' loss of the vote following disfranchising legislation passed in one Southern state after another in the late nineteenth through early twentieth century (see Bond 1934, 1939; Harlan 1958; Kousser 1980; Margo 1990; Myrdal 1944; Walters et al. 1997). Although this legislation deprived many poor whites of the vote, it fell most heavily on blacks (Ayers 1992; Kousser 1974; Woodward 1951).² Rather than documenting again that the loss of the black vote led to decreased access to education, at least in comparison to whites, we instead compare the degree to which blacks influenced policy concerning access to education and the strategies they used to improve access to public education before and after they lost the vote.

Korpi 1983). The empirical literature on the development of the American welfare state (and some of the literature on the European welfare state), however, usually focuses more narrowly on social insurance and social assistance programs, dating the birth of the American welfare state to New Deal social programs and their immediate precursors (Amenta 1998; Quadagno 1994; Skocpol 1992) and locating its ancestry in poor relief (Katz 1986; Trattner 1974). In other words, this literature focuses on the welfare-state function of providing protection from the market economy rather than locating the welfare state as an integral part of the development of mass democracy and its extension of social rights to citizens.

For our purposes, however, it is less important to determine whether public education belongs within the definitional boundaries of the welfare state than to establish education as an important—and early—American public spending program. Further, analyses of educational policymaking can benefit from and inform research on “the welfare state”—even if one limits the welfare state to social insurance and social assistance programs.

² Partial disfranchising measures were passed in a few Southern states in the 1880s, but most disfranchising activity took place between 1890 and 1908 (Kousser 1974:239). Disfranchisement made it impossible for blacks to fight Jim Crow legislation, which defined “the Negro's place” in every conceivable setting, from “courts, schools, and libraries” to “sidewalks and cemeteries” (Woodward 1951:212), and to resist a rising tide of repression and violence (Litwack 1998; Myrdal 1944).

In other words, we focus on the *process* by which blacks exercised influence over educational decision making both before and after disfranchisement.

Our analysis extends the literature on challengers' roles in policymaking in three important respects. First, we show that African Americans successfully used a strategy that we call "leveraging the state" that has been all but ignored in the literature on policy development. This strategy uses private funds to directly establish services in the *public sector*, sometimes in combination with partial public funding, and then secures the institutionalization of the services as a routine matter of state policy. Contrary to expectations in the literature on the resources required to affect policy, Southern blacks achieved some of their educational policy goals even after disfranchisement when they lost all political rights and most civil rights (Ayers 1992; R. Baker 1964; Kousser 1974; Woodward 1951). The disfranchisement of black Southerners circa 1900 made "leveraging politics" one of their few remaining political options, but only for affecting social rights, or social provision. To be sure, leveraging politics is a more limited form of power than full political participation, both because neither political nor civil rights can be leveraged with private funds—they can only be granted or extended by state action—and because it forces the challenger community to make its case from the position of supplicant rather than the position of claiming rights to which they are entitled.

Second, our study directs attention to policymaking at the state and local levels, which has received insufficient attention to date. With a few notable exceptions, such as Skocpol's (1992) important study of pensions for mothers and Civil War veterans, research on American social policy development usually focuses on federal policy or on policy that is a shared state/federal responsibility. We argue that public education's location as a local and state responsibility should not obscure the fact that it is an important and highly valued state-provided social good. One of the main reasons Southern blacks gave for migrating to the North starting in the second decade of the twentieth century, for example, was to secure greater access to public schooling for their children

(Grossman 1989; Leloudis 1996; Margo 1990, chap. 7).

Third, our study expands the range of groups identified as able to influence social policy development. A key set of players in our account of the development of public education for blacks in the South is Northern foundations and nonprofit organizations. The Rosenwald Fund in particular was a crucial ally with African Americans in the process of building a reasonably adequate system of rural public elementary schools for blacks. Together with money raised privately by the black community, Rosenwald money—and the conditions the foundation attached to its use—wielded a strong influence on educational policy development throughout the South.³ Although the literature on policy development has recognized the impact of one group of seemingly "non-political" actors, women in the presuffrage period (P. Baker 1984; Clemens 1993, 1997; Gordon 1990; Orloff 1993; Skocpol 1992), the political influence wielded by foundations and nonprofit organizations has not been fully appreciated. Like presuffrage women, Northern foundations were not seen as legitimate political actors—in the location in which they were trying to influence state policy, that is—and they were able to be politically effective because they presented themselves and were seen as outside of politics.

Some research has examined the role of nonprofit and philanthropic organizations in social service provision, but primarily sees them as deliverers of social services in lieu of the state (Powell and Clemens 1998), either filling a void caused by an absence of state services (Hansmann 1987; Jackson 1990, chap. 1) or as organizations that experiment with the delivery of social goods that are later brought within the state sector (Douglas 1987:48). Jenkins (1998) hints that foundations affect state policy, but he suggests that they follow an indirect route: They provide resources to social movement organizations that, in turn, exert political influence.

³ A similar path was taken by Andrew Carnegie in his use of private funds in conjunction with public funds to establish public libraries throughout the country (Bobinski 1969).

CHALLENGER GROUPS AND SOCIAL POLICY

For the best-developed insights on challenger group influence on policy formation, we draw on a growing literature that incorporates insights from two older bodies of research: the social movements and political institutionalist literatures. With respect to the question of how challenger groups achieve their policy objectives, both of the older literatures offer partial insights and overlook important processes. The social movements literature considers the general question of how groups that are either marginalized or powerless mobilize to try to affect political change, highlighting the importance of formal organizations and favorable political opportunity structures for successful mobilization (Jenkins 1983; McAdam 1982; McAdam, McCarthy, and Zald 1988; McCarthy and Zald 1977; A. Morris 1984; Tarrow 1994; Tilly 1978). This literature, however, focuses more on the emergence and growth of social movements than on movements' success in achieving policy objectives. The process of state policymaking has been studied extensively in the institutionalist tradition, but this literature has paid primary attention to dynamics internal to the state, such as the degree of state centralization, state bureaucratic capacity, and state fiscal power, and accords relatively little influence to groups in civil society (Orloff and Skocpol 1984; Skocpol and Finegold 1982; Weir, Orloff, and Skocpol 1988).

In one of the first studies of challenger groups' policy influence, Quadagno (1992) develops what she calls "state transformation theory." She argues that to succeed in creating new policies, social movements must penetrate and transform the state. She shows that two factors known to facilitate challenger mobilization also affected the influence of civil rights organizations on the War on Poverty: possessing organizational resources and confronting a favorable political opportunity structure (also see Amenta 1998; Amenta and Poulsen 1996; Clemens 1997; Dobbin 1992). Southern blacks' ability to leverage the state to provide better access to public education was significantly enhanced when they were able

to draw on the considerable organizational resources of particular Northern allies. On the other hand, disfranchisement and the elimination of competitive party politics created an unfavorable political opportunity structure for black political influence.

Other studies draw attention to the ways in which state institutional structures and administrative capacities affect challenger groups' influence on policymaking. In her analysis of the development of pension programs for Civil War veterans and for mothers, Skocpol (1992) modifies her former "state-centered" theory of politics to a "polity-centered" approach that identifies groups outside the state as important sources of change in state policy. She establishes that state and party structures and the scope of the electorate affect the "identities, goals, and capacities of social groups that become involved in the politics of social policymaking" and that a challenger's success is affected by "the 'fit'—or lack thereof—between the goals and capacities of various politically active groups, and the historically changing points of access and leverage allowed by a nation's political institutions" (Skocpol 1992:41). Her arguments suggest a need to consider the structure of state and local government and the location of responsibility for public education. Education was primarily a local responsibility; indeed, all of Southern politics was essentially a local politics during the period we consider (Ayers 1992; Link 1986). As such, local political institutions were the points of leverage for blacks and their allies, although the power of the state bureaucracy increased in the opening decades of the twentieth century. Finally, Skocpol reminds us that state actors are important in their own right; their interests are not reducible to the demands of social groups.

In a theory of "institutional politics," Amenta (Amenta 1998; Amenta and Poulsen 1996) argues that limited citizenship rights and lack of party competition limit challenger influence. (Patronage-oriented party systems, which were not characteristic of Southern politics, limit challenger influence as well.) Conversely, a challenger group is most likely to affect state policy if it forms alliances with politi-

cal party actors, if it is "highly mobilized and has established a political presence for itself," and/or if "conditions are already favorable for social spending programs" (Amenta 1998:38). None of these conditions applied to blacks in the South, especially following disfranchisement.

Clemens (1993; 1997), in turn, directs our attention to innovative strategies used by challenger groups unable to use either electoral politics or protest movements to achieve their political goals. From roughly 1890 to 1925, the limitations of party politics were transcended by women's groups and farmers, among others, as they moved away from organizing around party affiliation and instead organized around "specific issues or policy demands" (Clemens 1997:2) to press political demands. The new models of affecting state policy developed by challengers are generally extensions or displacements of "old" familiar forms of action that are culturally sanctioned (Clemens 1997: 59).⁴ Similarly, we find that the political strategies used by blacks and their allies in the most successful period of public-school development were creative extensions of known forms of action.

LEVERAGING THE STATE VIA PRIVATE MEANS

Theorizing about challenger influence on state policymaking assumes that the authority and responsibility for making the policy decision and finding the necessary public funds to support it rest entirely with state actors. This view leaves little room for Southern blacks to influence the state to expand public education, especially after the late nineteenth century when blacks could not vote, protest, or lobby, and when they could offer little incentive for political actors to ally with them. Disfranchisement made any form of voice in political decision-making ineffective, as it was no longer backed up by the vote. It also made the

⁴ Tarrow (1994) also argues that strategies for successful mobilization and action are usually drawn from "repertoires of contention," which are combinations of known ways of doing social protest (e.g., strikes, sit-ins, etc.) and creative innovation (also see Tilly 1978).

courts less likely to be sympathetic to blacks' claims; moreover, using the courts to make social policy requires resources Southern blacks did not possess in this period and requires challengers to litigate in every jurisdiction—a long and ineffective process. Exit, or the threat of exit, placed some limits on elite policymaking, but its effectiveness for securing blacks' social objectives was blunted by the variety of steps elites took, both legal and extra-legal, to limit black migration (Ayers 1992).

But even under these least promising of political conditions, African Americans *were* able to secure more state-provided schools. In a coalition with Northern philanthropic organizations, blacks extended and refined a strategy that had proved successful prior to disfranchisement: using private resources to engage the state in a public/private alliance to build public schools. The "gift" (from the perspective of white Southern political elites) of private funds to establish public services, literally inside the public sector, was a Trojan horse, allowing blacks to "sneak past" the normal barriers erected to their political influence and use the state itself to help achieve their goals. Strategies recognized as explicitly political at the time would have met with outright resistance, if not repression. The loss of political and civil rights following disfranchisement forced an abandonment of electoral politics and made insurgency much too costly. At the same time, the loss of these options forced a vastly increased reliance on a modification and extension of perhaps the only other tactic left to them, leveraging politics.

Thus, the model of policymaking implicit in most existing research is turned on its head. Instead of relying on state decision-makers to use public funds to provide a service, the aggrieved community first established the service themselves, in whole or in part, and used this as leverage to engage the state in increased and sustained support. This strategy depends on challengers' ability to bring to the table private money and to establish the service under the condition that the state will take it over. In this manner, a challenger group realizes its objective of having the service incorporated into the public sector.

The analysis to which we now turn focuses on efforts by African Americans and their Northern philanthropic allies to build public schools for blacks in the late nineteenth and early twentieth centuries. This necessarily requires paying attention to the development of public schools for whites as well: To follow "the black money," so to speak, one first must trace spending for whites (Bond 1939). We focus on two states, North Carolina and Alabama, which provide excellent opportunities for exploring our theoretical questions.

BUILDING SYSTEMS OF PUBLIC SCHOOLING FOR AFRICAN AMERICANS

THE HISTORICAL CONTEXT IN NORTH CAROLINA AND ALABAMA

Many aspects of the development of public education in the South are applicable to both North Carolina and Alabama. At the outbreak of the Civil War, the South was schooling only a small part of its white population, via private and denominational schools; few publicly funded schools existed (Link 1992).⁵ During the Civil War, some African Americans sponsored free schools (Alvord 1886; Jones 1980:61; R. Morris 1976: 6,43), but the earliest stage of a coordinated *system* of public education consisted of free schools for blacks operated by the Freedman's Bureau and the American Missionary Association (AMA) during Reconstruction (J. Anderson 1988).⁶ Reconstruction state governments built on this to estab-

⁵ The North, in contrast, established "common" (that is, publicly supported and controlled) schools in the first third of the nineteenth century, and common schools were fully institutionalized by about 1860 (Kaestle 1983; Spring 1990).

⁶ Interestingly, AMA efforts often were carried out in "alliance" with public school officials and local black citizens—a combination of interests and resources that would prove effective a generation later. The AMA's advocacy of racial equality and social and political rights for black Southerners won them few friends (and often met with violent white resistance), particularly after federal troops withdrew at the end of Reconstruction (Richardson 1986).

lish state-supported systems of schools to serve both whites and blacks, but throughout the late nineteenth century, public schooling remained inadequate for both races due to near-bankruptcy of the state and white elite opposition to universal education for anyone. Consequently, white communities and black communities often had to bring substantial amounts of private funding to the table to secure public educational services. For whites, the tide turned after disfranchisement (circa 1900),⁷ when most states made it a major priority to vastly improve education for whites. Black Southerners, however, had to wait until well into the twentieth century for a barely adequate number of elementary schools to be established (Leloudis 1996; Link 1986, 1992).⁸

Despite these key similarities, there were important differences between North Carolina and Alabama. North Carolina had arguably the worst educational record in the country in the 1880s, but by the early twentieth century it led the South in educational development, becoming the region's exemplar of educational progressivism. It was probably the most politically progressive pre-disfranchisement Southern state, with African Americans playing a sometimes important role in a competitive, multiparty political environment in which both Populists and Republicans effectively challenged Democrats for power throughout the late nineteenth century.⁹ While cotton was an impor-

⁷ North Carolina instituted poll taxes, literacy tests, property tests, and the grandfather clause in 1900, whereas Alabama passed the same measures in 1901 (Kousser 1974).

⁸ Southern blacks had to wait even longer for a system of public secondary schools. It was not until the 1920s that most Southern states began establishing high schools for blacks, after they had ensured that whites had ample access to public secondary education (J. Anderson 1988).

⁹ Between Reconstruction and disfranchisement, North Carolina's Second Congressional District, for example, sent four African Americans to the U.S. Congress and over 50 to the state General Assembly. Scores more held local political office (E. Anderson 1981). The height of the Populist challenge in the South occurred in the mid-1890s in North Carolina, when a coalition of Republicans and Populists (called Fusionists) briefly controlled state government, due largely to overwhelming black support. Fusionists tried

tant agricultural product, North Carolina developed into an industrial and commercial center of the New South in the early twentieth century and it lacked the large "black belt" that dominated significant sections of the Deep South states.

Alabama's public educational system was only slightly better developed than North Carolina's in the 1880s, but its political structure was much less competitive. The vote of the state's large black population, concentrated in the "cotton belt" of central Alabama, was effectively controlled by white Democrats via widespread fraud after the mid-1870s (Bond 1939; Hackney 1969; Kousser 1974; Woolfolk 1987). Politics and economics were controlled by a conservative alliance of rural planters and industrialists in the emerging city of Birmingham. The conservatives, who controlled the Democratic Party, faced significant political challenges from the Farmers Alliance and the Populist Party around 1890, but fraud kept Democrats in power—fraud twice denied the governorship to the Populists in the early 1890s (Ayers 1992; Kousser 1974). After the turn of the century, Southern educational progressivism did not take hold as thoroughly in Alabama as in North Carolina and racial inequality in education was much greater there.

BLACK POLITICAL POWER AND EDUCATIONAL POLICYMAKING PRIOR TO DISFRANCHISEMENT

Black membership in the polity and the competitive nature of Southern politics between Reconstruction and disfranchisement meant that blacks could use the vote to influence state educational policymaking. Kousser (1974:11) notes that prior to disfranchisement many black leaders "continued to hold office, to trade the still substantial Negro vote for favors for the race or for them-

to limit public funding of university education, which they saw as a benefit to elites (Leloudis 1996), but they were strong advocates of increased public support for common (elementary) education (Kousser 1974). The latter was true for Populists throughout the South, yet it was only in North Carolina that they briefly gained control of the state.

elves, and even continued to influence legislation." Bullock (1967:87), for example, argues that the vote was the "basic tool" by which blacks "could keep their schools strong." They did so by running "for the offices through which school systems were run or school funds were appropriated," and by voting "for those who would be candidates."

Blacks could wield direct influence over educational legislation. For example, whites introduced a bill into the Alabama General Assembly in 1874–1875 to have the poll tax (a primary form of support for public schools) retained in the counties where it was collected, but black legislators secured a vitally important amendment to the bill that prohibited the division of the fund between black children and white children on a pro rata basis (Bond 1939:139); the bill passed as amended. Further, the Tuskegee Institute, the nationally influential institution of higher education for blacks in Alabama and a center of black political influence following disfranchisement, was "founded as a State Normal School, in fulfillment of a pledge made to a Negro politician . . . [by] a white candidate for the General Assembly on the Democratic ticket" (Bond 1939:139–40).

Prior to disfranchisement, divisions among white factions sometimes provided opportunities for blacks to gain their educational objectives (Woodward 1951). For example, in Atlanta in 1888 a schism among white politicians led to each party's "vigorous solicitation of black support" (Peterson 1985:98–99). Blacks ultimately lent their support to the victorious Citizens' Ticket in return for a promise to build a new school for blacks in the fifth ward—a promise the elected politicians honored. In 1891 blacks again brokered a promise to build additional schools for blacks in exchange for support for the Citizens' Ticket.

When blacks had the vote they could also lobby local school boards. Through petitions and other forms of presenting requests, blacks successfully persuaded school boards to staff schools for blacks with black teachers (Rabinowitz 1974), prevailed upon them to construct new schools for blacks or to improve existing ones (Plank and Turner 1987), and influenced board decisions about teacher selection and the location of new schools (Link 1986).

**LEVERAGING THE EDUCATIONAL STATE:
BLACK STRATEGIES AND WHITE
STRATEGIES**

In the predisfranchisement South, two factors limited blacks' (or whites') ability to use their electoral power to secure better schools: the state's lack of financial resources, and politicians' general unwillingness to undertake the difficult task of providing adequate numbers of free public schools for blacks and poor whites. Our review of the minutes of school board meetings for a number of cities and counties in North Carolina and Alabama shows that groups of black and white citizens often petitioned school boards throughout the South for the establishment of new public schools in their communities.¹⁰ On occasion, school boards granted the request outright. More often, though, the requests were granted on a cost-sharing basis: The group petitioning for the new school had to provide most of the school's cost. For example, the Mobile, Alabama, school board commonly stipulated that there "be no additional cost to the Board" (Minutes of the Mobile County School Board, 1880–1900). The strategy of using private resources to leverage public policy was developed prior to disfranchisement and was used by both blacks and whites to engage a state unable—and perhaps unwilling—to fully finance adequate educational opportunities. The following ex-

¹⁰ An essential data source for our project was the surviving minutes for city and county school boards. We examined, for the period from the 1880s to the 1920s, the North Carolina school board minutes for New Hanover County, which includes the city of Wilmington (Minutes of the New Hanover County Board of Education, 1885–1919); Gaston County, in the heart of the state's textile region (Minutes of the Gaston County Board of Education, 1885–1920); and Northampton County, in the majority-black northeastern corner (Minutes of the Northampton County Board of Education, 1875–1923). For Alabama, we examined the school board minutes for the city of Birmingham (Minutes of the Birmingham Board of Education, 1884–1918), and the city/county system in Mobile County (Minutes of the Mobile County School Board, 1880–1918). Archival sources are cited in a separate listing called "Archival Sources," which appears after the reference list at the end of this article.

ample from New Hanover County, North Carolina is typical:

The County Superintendent reported that he had conferred with the school Committee in District No. 4, in regard to furnishing a teacher for the colored children, who had heretofore no school advantages, and thought it wise to give them a teacher as soon as a room could be provided for school purposes, which the colored people should support at their own expense until further development. (Minutes of the New Hanover County Board of Education, October 3, 1892)

And from Mobile County, Alabama:

Regarding a petition to establish a school for the colored children at Wheelerville, we recommend a teacher be furnished by the Board, the patrons of the school to provide a house and furniture, etc. (Minutes of the Mobile County School Board, June 13th, 1894).

White communities as well as black communities used this strategy for gaining more schools, as illustrated by the following petition from a group of white citizens¹¹ from Mobile County, Alabama:

A petition from the citizens of Oak Grove, asking that they be allowed a school at that place, they agreeing to build a schoolhouse at their own expense and asking the board to provide a teacher and such school furniture as may be necessary for the school. We recommend a teacher and a school established at that place, provided that the schoolhouse be built and furnished without cost to the board, the school to open as soon as the house is ready for occupancy, and the school to be conducted under the rules and regulations of the public schools of Mobile County. (Minutes of the Mobile County School Board, November 11, 1891)

Such arrangements were common throughout Alabama and North Carolina in the late nineteenth century.

To be sure, poverty limited the extent to which local communities could use private resources in alliance with public funds. Nonetheless, by providing a physical school

¹¹ In this and all Southern documents of the era, if race is not specified the reference is always to whites.

house and equipment, many communities were able to get school boards to supply a teacher and run the school as part of the public education system. A 1904 Southern Education Board (SEB) report indicates that in both North Carolina and Alabama many public schools for blacks were held in privately owned buildings (Southern Education Board Records, 1904), showing that this leveraging strategy was fairly widespread, at least for blacks. Once a school was built through this public/private alliance, it became part of the public school system.¹²

Not only did most of the funding for these public schools come from private sources, but also the impetus for their creation started in local communities. In providing buildings for schools, the role of Southern black churches cannot be overestimated. Ministers, supported by their congregations, often formed the nucleus of the efforts to create schools and frequently presented the petitions for new schools to school boards. In the language of social movement scholars, the church was an indigenous organization that was crucial to community mobilization (A. Morris 1984). Further, a church was the one physical structure that even the poorest, most isolated rural communities usually had—the building itself was a crucial resource in private efforts to form alliances with the state.

Widespread poverty among blacks and whites meant that neither group had the resources to build an adequate *system* of public schools, even at the elementary level, in this manner. Further, they did not have the

¹² There appear to be only two circumstances under which schools for either race were closed, once they were established: If the number of students dwindled significantly, or if two or more existing schools were consolidated into a larger facility. In the case of a consolidation of schools for blacks or schools for whites, access to education was almost always improved by the change. When money was tight, boards turned to a variety of cost-saving measures short of school closing, including cutting teacher salaries, shortening the school term, and halting the opening and/or construction of new schools. Although school officials may have occasionally closed a viable public school for blacks, we believe such an action was rare. Our review of school board minutes, for example, did not reveal a single instance of closure for either blacks or whites.

region-wide or state-wide organizational basis to coordinate such an effort, even if they had had sufficient resources to leverage the state into building an adequate system of schools one school at a time.

DISFRANCHISEMENT AND ITS AFTERMATH: INSTITUTIONALIZED INEQUALITY

Strangely enough, educational progressivism came to the South as part and parcel of disfranchisement and the virulent white supremacy campaigns that accompanied it (Ayers 1992; Link 1992). Pledges to build a comprehensive public education system for whites played a central role in disfranchisement politics. For example, in 1900 North Carolina voters brought conservative Democrats back to power and passed a disfranchisement amendment that, among other things, by 1907 restricted the vote to those who could read, something that would have taken the ballot away from a large percentage of poor whites. To win white votes, particularly in the predominantly white mountain areas of western North Carolina, Democrats promised to build public schools to educate every white child so that they could read and, therefore, vote. For whites, disfranchisement occasioned a transition from a reluctant state with respect to public schooling to a state that championed improved education—it became state business to promote public schooling for whites. Disfranchisement gave white political elites the ability to improve public schooling for whites without being obliged to fund reasonably equivalent improvements in schooling for blacks.

Why did Southern policymakers not take steps to dramatically *reduce* public schooling for blacks following disfranchisement? Why did they maintain public schools for blacks at all?¹³ Answering these questions

¹³ The question of why blacks received *any* public goods (including education) after disfranchisement has been explored extensively by Margo (1990) and dubbed "Myrdal's paradox." Note, however, that the framing of the question makes a crucial assumption: That whites' unchecked self-interest was to give blacks nothing in order to maximize social goods for themselves. However, we believe that white self-in-

requires first addressing what white supremacy meant to the “new South” men who promulgated the ideology and crafted the state policies that followed from it. Above all, white supremacy meant “white over black” (Cooper and Terrill 1991:577), *not* elimination of all opportunity or social goods for blacks. White supremacy, based as it was on paternalism, included a commitment to black “progress” and “uplift” (Link 1992; Woodward 1951), albeit “along lines that whites would dictate” (Link 1992:70), and co-existed with a “mixture of paternalism and *noblesse oblige*” (Woodward 1951:401).¹⁴ The challenge for white reformers was to find “a formula for black progress that would reconcile [their] white supremacist views with a program of purposeful development” (Link 1992:75).

There were other important safeguards against the drastic reduction or elimination of schooling opportunities for blacks. First, *Plessey v. Ferguson*, the 1896 U.S. Supreme Court decision that established the “separate but equal” doctrine, forced Southerners to maintain a fiction of “equal” in order to hold on to “separate.” Second, Southerners had vivid and distasteful memories of Northern occupation and American Missionary Asso-

terest was served by providing *some* educational resources for blacks, as long as whites were always ahead of the game.

¹⁴ The mix of white supremacy and paternalism is apparent, for example, in the views of Alexander McKelway, a leader in the North Carolina disfranchisement campaign of 1898–1900. Along with his commitment to white supremacy, he held that whites “were obligated to uplift blacks ‘to the highest possible plane’” (Link 1992:68–69). Although some whites may have preferred to dramatically reduce or even eliminate public spending on black education, the only major political attempt to reduce spending for black education to below disfranchisement levels consisted of challenges in some Southern states to limit funding of schools for blacks to the amount of taxes paid by blacks. Such moves were defeated (Cooper and Terrill 1991; Woodward 1951). In North Carolina, the courts played an important role in turning back these challenges (Beezer 1983; Coon 1926; Logan 1955). Moves to deprive blacks of *all* public educational services were not mounted, save a failed attempt by Governor Vardaman in Mississippi (Cooper and Terrill 1991).

ciation schools with their ideology of social and political equality (see note 6)—both of which, they feared, might return if educational conditions for blacks became too deplorable. Third, some Southerners, particularly industrialists, saw an advantage to “properly” training and educating African Americans (and poor whites), particularly in an urbanizing South, and promoted industrial education for blacks (J. Anderson 1988; Leloudis 1996). Fourth, Southern public education, like public education elsewhere in the country, became increasingly professionalized and bureaucratized in the early twentieth century (Tyack 1974). This partly insulated Southern educators, who were committed to some form of progress for African Americans, from popular political pressure and thus allowed them to more freely share school revenues with African Americans (Harris 1985). Finally, what whites called “migration fever” (Leloudis 1996:212) played an important role, especially after black migration out of the South accelerated during and after World War I. Seeing that blacks were voting with their feet against inadequate schooling opportunities (Margo 1990, 1991), whites fought the loss of black labor by, among other things, reducing some limitations on blacks’ access to public schools—especially when they could improve schools for blacks with non-public funds.

LAYING THE LEGAL FOUNDATION FOR RACIALLY UNEQUAL SCHOOLS

After consolidating power throughout the South, a central part of the Democrats’ overall goal of codifying white supremacy was establishing legal mechanisms for racially unequal educational funding. States found ways to subvert the equality requirement contained in *Plessey v. Ferguson*: They apportioned state education funds to counties in a race-neutral way, but allowed counties to spend the money in a racially unequal manner—albeit not explicitly so. For example, the Education Committee of the Alabama Constitutional Convention decided unanimously that “equal benefits of the school fund of the races shall be equal as nearly as *practicable*” (Proceedings of the 1901 Alabama Constitutional Convention,

1901). "Practicable," of course, meant spending disproportionately on schools for whites. As Bond (1939) long ago pointed out, the greatest benefits of this practice accrued to whites in predominantly black counties, whose school boards had the largest black "pots" from which to skim. Rural Wilcox County, Alabama is perhaps the most extreme example: Around 1910, it spent 33 cents per student for its 11,000 black children, and 15 dollars per student for its 2,000 white children (Peabody Education Fund Papers, 1915).

In other cases, disfranchisement gave white officials the power to activate for the first time legal opportunities created by pre-disfranchisement legislation to fund education in a racially unequal manner. The North Carolina legislature enacted legislation in 1885 that relieved local boards of the obligation to distribute school funds on a strictly per-student basis, regardless of race. After 1885, two-thirds of local school boards' funds still had to be spent equally regardless of race, but the remaining one-third was to be spent in "such manner as to equalize school facilities to all districts of the county, as far as may be practicable and just to all concerned, without discrimination in favor of or to the prejudice of either race" (Logan 1955:352). This gave local school officials discretion to spend proportionately more on education for whites, but the overall trends in school funding by race suggest that boards did not take significant advantage of this ability until after disfranchisement, possibly because educational budgets remained small until the early twentieth century. Figures 1a and 1b show racial inequality in the accumulated value of school property, which indicates the educational resources available to the local black communities and white communities. Figure 2 concerns inequalities in annual spending for new schools, which shows year-to-year variation in school-board allocation decisions and is more sensitive to changes in educational policy.

"THE GREAT EDUCATIONAL AWAKENING"

After disfranchisement, most Southern states undertook enormous "propaganda" campaigns to persuade whites to vote the

necessary taxes to improve public schools for whites and to make sure increased numbers of white children actually attended them. North Carolina, however, was the clear leader (Leloudis 1996), with state officials and educators traveling to every corner of the state on a mission resembling a mixture of political campaign and county carnival. In this endeavor, Southern states were assisted by two northern organizations, the Southern Education Board (SEB) and the General Education Board (GEB). Both organizations heavily supported propaganda campaigns for educational improvement in the South after 1898 and 1902, respectively (J. Anderson 1988; Harlan 1958; Leloudis 1996). The SEB's need to accommodate the ideology of white supremacy to be able to operate at all in the South limited its ability to promote educational improvements for blacks, however (Bullock 1967). White Southerners' acceptance of the SEB was facilitated by the group's emphasis on industrial or vocational schooling for blacks. Southern progressives limited their school-building campaigns to "whites only," as Woodward (1951) put it or, as Kousser (1980) later modified it, to "middle class whites only." Consequently, whites were able to enjoy the benefits of a vastly improved educational system whose development was orchestrated primarily through the state educational bureaucracy itself.

Not so for blacks. After disfranchisement, blacks had few formal political options for influencing policymaking. And they faced a hostile state that made it an explicit policy to at best hold steady educational opportunities for blacks, all the while using increasing state resources to improve and expand public schools for whites.

A comparison of the available data on racial inequality in public education before and after disfranchisement illustrates that the loss of the vote for blacks had dramatic consequences.¹⁵ In North Carolina prior to disfran-

¹⁵ The best available indicator of state commitment to public schooling is spending on public education, particularly the value of the inventory of school property and spending on new schools (and sites). Racial inequality in spending on teacher salaries also shows the degree to which the state was able to institutionalize racial in-

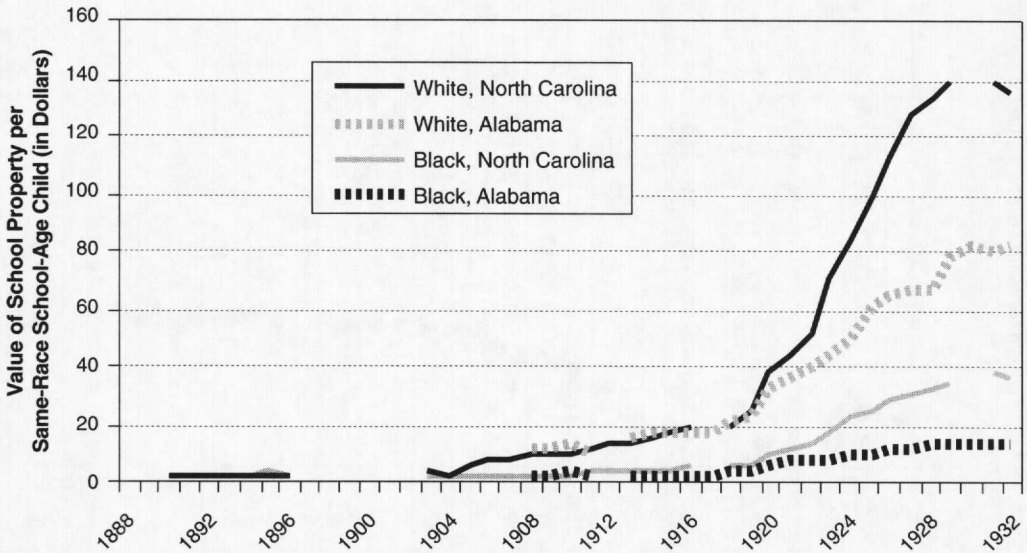


Figure 1a. Value of School Property per Same-Race School-Age Child: North Carolina and Alabama, 1888 to 1932

Sources: North Carolina Department of Public Instruction (1895, 1897, 1904, 1907, 1908, 1910, 1912, 1914, 1917, 1921, n.d.a, n.d.b, n.d.c, n.d.d, n.d.e); Alabama Department of Education (1910, 1911, 1913, 1914, 1915, 1917, 1918, 1919, 1920, 1921, 1922, 1923, 1924, 1925, 1926).

chisement in 1900, educational spending was relatively racially equal—that is, equally poor and equally inadequate (see Figures 1a, 1b, and 2). In some years prior to 1900, blacks even enjoyed a slight advantage over whites in the educational resources available to them. But racial inequality escalated rapidly after 1900.

The same general process appears to be true for Alabama, although its records are not nearly as complete as North Carolina's. Prior to the 1891 law giving essentially complete spending discretion to local school officials, the Superintendent of Education was required to divide the school fund on an equal per capita basis between whites and blacks, and available data suggest that school funding was, in fact, relatively ra-

equality for teachers, but it is not a good measure of inequality of *students'* educational opportunity. The pay differential between black teachers and white teachers may not reflect differences in teacher quality. Indeed, public schools for blacks could attract some of the best educated and most accomplished members of the black community, meager salaries notwithstanding, because professional opportunities for blacks were severely limited (J. Anderson 1988; Neverdon-Morton 1989; Werum 1991).

cially equal prior to 1891. In the 1879–1880 school year, for example, school funding per school-age child was nearly equal for whites and blacks: \$.99 and \$.97, respectively. Calculated on a per student basis instead, whites actually received considerably less funding than blacks: \$1.98 and \$2.33, respectively (Alabama Department of Education 1880). Alabama did not publish data on educational funding by race between 1891 and 1907 (Bond 1939), but by 1908 the effects of the change from a division of school funds to provide “equal benefit” to blacks and whites to a division in a manner township trustees deemed “just and equitable” is clear: The value of school property per same-race school-age child was almost 11 times greater for whites than blacks (Figure 1b).

The differences between Alabama and North Carolina in racial inequality in education are telling. Recall that Alabama had a more closed political opportunity structure than North Carolina prior to disfranchisement; further, after the turn of the century progressivism took root earlier and more firmly in North Carolina. For Alabama, the important “turning point” appears to have been the passage of the 1891 funding law that provided for grossly unequal school funding.

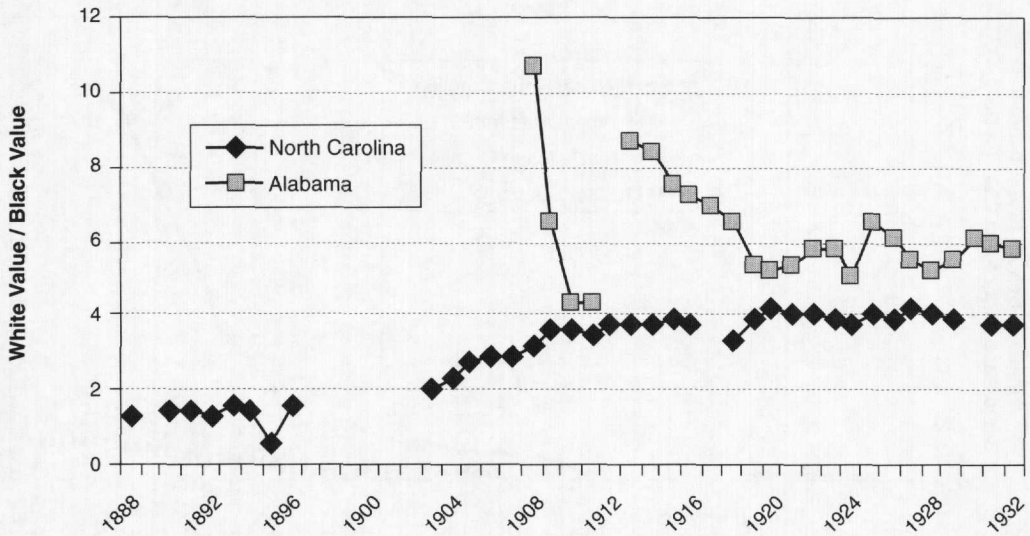


Figure 1b. Racial Inequality in Value of School Property per Same-Race School-Age Child: North Carolina and Alabama, 1888 to 1932

Sources: North Carolina Department of Public Instruction (1895, 1897, 1904, 1907, 1908, 1910, 1912, 1914, 1917, 1921, n.d.a, n.d.b, n.d.c, n.d.d, n.d.e); Alabama Department of Education (1910, 1911, 1913, 1914, 1915, 1917, 1918, 1919, 1920, 1921, 1922, 1923, 1924, 1925, 1926).

Note: The inequality ratio shown in Figure 1b assumes a value of 1 under a condition of racial equality. Values higher than 1 indicate inequality favoring whites.

In North Carolina, however, blacks and other “non-Democratic” parties remained potent political forces until 1900; racial inequality, as measured by indicators such as the value of school property, remained very small during the 1890s, but rapidly increased after disfranchisement (Figures 1a and 1b). And it never reached the extremes in North Carolina that it did in Alabama, reflecting perhaps the more racially progressive political climate and the fact that Alabama had a much larger African American population to “skim funds” from. In the first three decades of the twentieth century, the peak in inequality in the value of school property in North Carolina was a little more than 4 to 1 in favor of whites, compared with a the peak of almost 11 to 1 during the same period in Alabama.

For North Carolina, Figure 2 tracks the year-to-year variation in money spent on new public school construction by race, which clearly shows annual variation in school boards’ allocation of resources between blacks and whites. White political elites responded quickly to the “opportunities” afforded by disfranchisement for spending unequally on education: Spending on new

schools was relatively equal racially in the 1890s, but in the immediate aftermath of disfranchisement this annual figure spiked to as high as nine times more for whites. By several years after disfranchisement, spending inequality settled down to about four times more per year on new schools for whites than blacks, and remained so until the late 1920s.

A decade or more after Southern progressives began promoting “universal education,” there were only minimal gains for black education in most areas in Alabama and North Carolina. Public school facilities for whites, on the other hand, improved rapidly (Figures 1a, 1b, and 2). While the groundwork for a public school system for African Americans clearly had been established, it was inadequate and unequal. A lack of school buildings, particularly in rural areas, continued to be the most immediate problem.

WHITE COMMUNITIES AND BLACK COMMUNITIES: LEVERAGING POLITICS CONTINUED

Even though it became state business after disfranchisement to promote education for

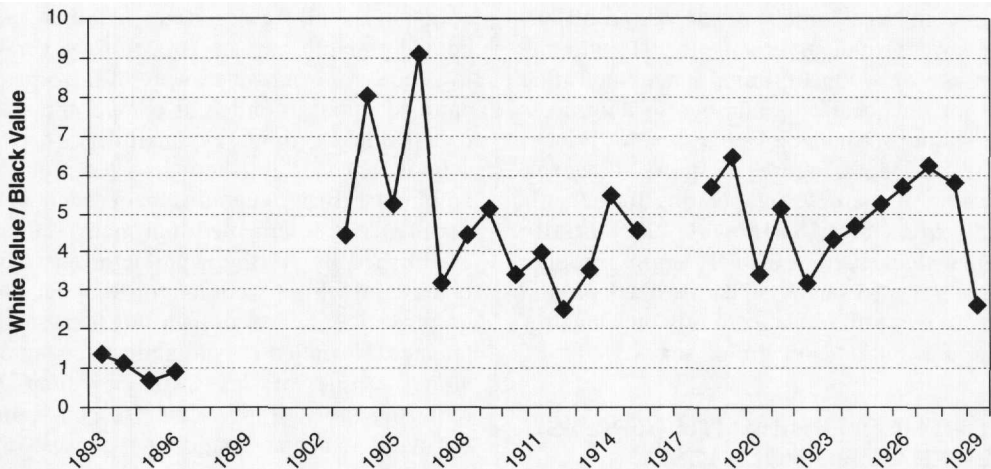


Figure 2. Racial Inequality in Spending for New Schools per Same-Race School-Age Child: North Carolina, 1893 to 1929

Sources: North Carolina Department of Public Instruction (1895, 1897, 1904, 1907, 1908, 1910, 1912, 1914, 1917, 1921, n.d.a, n.d.b, n.d.c, n.d.d, n.d.e).

Note: The inequality ratio assumes a value of 1 under a condition of racial equality. Values higher than 1 indicate inequality favoring whites.

whites, fiscal limitations emerged, and white citizens still sometimes found it necessary to pressure the state to build additional schools by bringing private resources to the table. Blacks continued to rely on this strategy to an increasingly greater extent than whites.¹⁶ This was even the case in Alabama, which had a peculiar tax situation that severely limited the amount of money available for school construction. Prior to 1916, local communities in Alabama were not allowed to levy local taxes for schools—all educational funds came from the state, and the state allowed only small amounts of these funds to be spent on school construction. These two factors severely limited new school construction in Alabama, even after the 1891 law and after formal disfranchise-

¹⁶ This is evident in each set of school board minutes we examined. Take the example of Mobile County, Alabama: After the turn of the century, petitions by whites were more likely to be granted outright and fully funded by the state, whereas petitions by blacks were more likely to be approved on a cost-sharing basis. And by the 1910s, appropriations for new schools for whites in response to petitions were often substantially more generous, because the county was attempting to consolidate sets of three or four small schools for whites into one new, modern school building.

ment in 1901. In response to these problems, the Alabama legislature passed a law in 1907 “authorizing state aid for building and repairing rural schoolhouses.” For each schoolhouse aided via this law, the state provided a minimum of \$100 and a maximum of \$200 to a community “when endorsed by the county board of education” and on the conditions that the community gives “at least as much as the State gives” and that “the property be deeded to the State in order that it may be maintained perpetually for a public school” (Alabama Department of Education 1913:28).¹⁷ Interestingly, this law institutionalized the mixing of privately raised funds and public funds to build new schoolhouses that had characterized school building for blacks and whites in both North Carolina and Alabama in previous decades. The limitations of basing a school construc-

¹⁷ Unfortunately, we could not locate any records of how local communities made use of this law or racial differences in school construction under this provision. The state contribution, even the maximum one, provided only a small portion of the cost of a new one-room school. When the Rosenwald Fund built its first school in Alabama only six years later, for example, the cost of construction was over \$900 (Julius Rosenwald Fund Papers, 1928).

tion campaign largely on private contributions were finally overcome in 1916 with the passage of a constitutional amendment that authorized local communities to levy taxes for schools (Alabama Department of Education 1917). As Figure 1a shows, however, the rate of increase in spending for schools for whites after 1916 was substantially higher than the rate of increase in spending for schools for blacks. That is, blacks found themselves still less able to rely on state provision of public educational services.

NORTHERN PHILANTHROPISTS: LEVERAGING POLITICS MODIFIED AND EXTENDED

Although the Southern Education Board did little to materially promote the construction of more or better schools, its propaganda activities helped shape a political and social commitment to public education that would be a resource for others. Later, Northern philanthropic groups that directly funded black education entered the picture (e.g., the Rosenwald Fund for school construction, and the Jeanes Fund, which supported supervising teachers) (J. Anderson 1988; Leloudis 1996). These groups presented a strategic opportunity for Southern blacks to make alliances for improving public educational opportunities in black communities. In some respects, Northern philanthropic organizations were not ideal allies, for they were political outsiders in Southern local and state politics, and, unlike their AMA predecessors, they did not support racial equality. Nonetheless, they possessed considerable private resources they were willing to use, in alliance with local black communities, to leverage the state to bring about their educational policy objectives. The liability of being a political outsider closed off the option of direct political influence. The advantage of enormous private resources, however, allowed them to join with black communities in innovative strategies to leverage the state—and to do so on a much larger scale, with much more impressive results, than black communities themselves had hitherto been able to accomplish with a similar leveraging strategy, because of their limited financial resources and the absence of an organizational structure to coordinate efforts.

In nearly all cases, state officials welcomed philanthropic organizations' leveraging endeavors and were aware of the organizations' intent to entice or compel the state to assume ongoing responsibility for the school, once established. In 1905, for example, the Birmingham, Alabama school superintendent commented that many schools established by Northern philanthropists for blacks and whites were languishing because no provision had been made for their maintenance. He called for philanthropic support along the lines of "Mr. Carnegie's plan" of requiring the state to assume responsibility for maintenance and ongoing expenses:

The chief difficulty in a private institution apparently is not the original outlay, but the continued annual maintenance. In a state or municipal institution, on the other hand, the chief difficulty is to secure the original outlay—to get the work started. The question of maintenance by taxation once provided ceases to be regarded as a burden. . . . [B]esides, this plan [has] the advantage of enlisting local public sentiment and developing a sense of social and civic obligation and responsibility for the proper discharge of a trust once accepted. (John Herbert Phillips Papers, January 24, 1905)

This position was common among Southern white reformers, most of whom were open to what we term "leveraging politics."

THE ROSENWALD FUND: LEVERAGING POLITICS ESCALATED

Julius Rosenwald, co-founder of Chicago-based Sears Roebuck & Co., took an active interest in a wide range of philanthropic endeavors. At the urging of Booker T. Washington, Rosenwald turned his interests—and substantial resources—to building school houses for African Americans in the rural South. Rosenwald's commitment to vastly improving public educational opportunities for Southern blacks was realized via an innovative strategy that required an alliance with local black communities and built on prior successful means of leveraging the state with private funds.¹⁸ This strategy tran-

¹⁸ Rosenwald's strategy, intentionally or not, built on the leveraging strategy that had been used since the late nineteenth century by blacks

scended the limits of purely private philanthropy by embedding its efforts *within* the state, thus changing state educational policy.

Rosenwald built schools with a combination of his own money, money from the local (black) community, small contributions from local whites, and state funds.¹⁹ Further, his "gift" of a school building for black children to the state was conditioned on the state immediately folding it into the public school system and continuing to sustain and operate it in the same manner as any public school established wholly by the state. The first school was built in Lee County, Alabama (near Booker T. Washington's Tuskegee Institute) in 1913 at a cost of \$952.50. Local blacks raised \$150 and contributed \$132.50 worth of labor. Local whites gave \$350, Rosenwald contributed \$300, and the state of Alabama and Lee County agreed to maintain the school as part of the public education system. Apparently pleased with the results, on August 14, 1914, Rosenwald gave \$30,000 to build 100 additional schools. Out of this money, 92 houses were actually built (79 of them in Alabama), with Rosenwald contributing 33 percent of the total cost, local blacks 45 percent, local whites 6 percent, and the various states 16 percent (Julius Rosenwald Fund Papers, 1928).

In 1917, the Rosenwald Fund was chartered to build public schoolhouses for rural blacks throughout the South, with a budget of \$4 million. Generally, there were three components to the funding of Rosenwald Schools—the black community (and at times small contributions from local whites), the Rosenwald Fund, and the state. One crucial facet of the Rosenwald Fund is that it explicitly engaged the state. A 1928 Trustees Conference report spelled out their long-held philosophy:

and whites in the South. It also resembled the 1907 Alabama law institutionalizing a mix of private contributions and public funding for the construction of new schools. The strategy may also have been influenced by a similar cost-sharing strategy used by other philanthropists trying to improve public social services, such as the Carnegie public library campaign.

¹⁹ Account of the origins and operation of the Rosenwald Fund can be found in Embree and Waxman (1949), J. Anderson (1988), Hanchett (1988), and Leloudis (1996).

Cooperation with government departments. This is probably the soundest method of working for a Foundation in any field. Large support for long periods of time can be counted upon most readily from tax funds. Insofar as governments can be brought together procedures and higher standards, enduring results may be expected. (Julius Rosenwald Fund Papers, 1928)

The funding process in North Carolina was typical of other states. To request Rosenwald money, the local school superintendent applied to the State Division of Negro Education. If the director of this division approved the application, it was sent to the Extension Agent at Tuskegee Institute, who distributed Rosenwald Fund money throughout 14 Southern states.²⁰ A 1915 request from A. Akers of Halifax, North Carolina, illustrates the process:

The Negro patrons of School No. 6, Halifax township have raised \$200 and the county has appropriated \$200 for the erection of a building. This is a rural section with a census of 112 children using a rented house which is in very bad condition. We hereby apply for \$200 from the Rosenwald Fund. This is a needy case and the community deserves a better house than we can give them without help. (Department of Public Instruction, September 1915–August 1915)

The impetus for getting Rosenwald Fund money had to come from the local black community.²¹ This is clearly demonstrated in a 1915 letter from N.C. Newbold, director of the North Carolina Division of Negro Education, to 16 county superintendents:

Only four or five will get funded, schools where the Negroes dig deep into their own pockets and make sacrifices for buildings, I shall be glad to select those who appear to have made the greatest effort to help themselves. (Department of Public Instruction, September 1915–August 1916)

²⁰ Applications were handled in this manner until 1920, when administrative control was moved from Tuskegee to a newly created office in Nashville under the direction of Samuel Leonard Smith (Hanchett 1988).

²¹ Poverty aside, it was difficult to raise community money in rural areas dominated by sharecropping, where cash transactions were infrequent (Hanchett 1988). Black communities usually had to raise money literally a penny or a nickel at a time.

In the postdisfranchisement South, Rosenwald funding gave blacks an opportunity to pressure the state to provide more adequate educational opportunities for their children. Prior to Rosenwald:

Local school boards routinely offered poverty as an excuse for turning away appeals [from local blacks] for new buildings. But that tactic lost much of its credibility when set against grassroots fundraising efforts and the prospect of a matching Rosenwald grant. As a result, . . . advocates of black education found it easier to press their cause and to "get a hearing" from even the most recalcitrant white officials. (Leloudis 1996:217)

In the end, it was the Rosenwald Fund's ability to forge an alliance of the state, local communities, and private philanthropy, and to implement this alliance on a wide scale with significant amounts of funding, that proved successful. Also significant was Rosenwald's success in penetrating the state bureaucracy and helping to expand and professionalize it. Rosenwald did this by mandating that funding requests go through state departments of education and by establishing and paying the salaries of both white and black assistants to the white "Negro Agents" within state bureaucracies. These actions contributed to the establishment of a competent network of administrators, including some African Americans, who would continue to advocate for increased state funding of public schools for blacks long after the Rosenwald initiative ended (Hanchett 1988:406–407). Few educational efforts during the Progressive Era were so widely supported by all parties involved.

From the perspectives offered by social movement scholars and those who study the development of welfare state policies, it is not surprising that far greater momentum toward building an adequate system of public education for blacks was gained when the Rosenwald Fund, a formal organization that had considerable financial and organizational resources, was established. However, the organization was not created by the aggrieved communities themselves—it was created by outsiders who became their allies. This identifies another opportunity for an alliance with elites that has not received much attention in the literature. It is especially

noteworthy that the ally in question was a political outsider—not a faction of the (regional or state) political elite.

Thus, a change in the political opportunity structure, especially the disfranchisement of blacks and many poor whites around the turn of the century, affected challenger opportunities for wielding formal political power and influencing state policymaking. But the closing of the political opportunity structure did not shut off political action. Instead, it channeled challenger political action in a way not anticipated by existing research: attempts to leverage state policy by intertwining private with public resources to create and sustain state services.

The post-Rosenwald strategy of using private funds to leverage the state on a scale not previously seen was a creative extension of forms of political action known to both parties in the coalition—Northern philanthropists and Southern blacks. Not only challengers—the aggrieved community—drew on "repertoires of contention" (Tarrow 1994) or "organizational repertoires" (Clemens 1997); allies did as well. The parties drew on different repertoires—blacks drew on the way that black communities and white communities had sometimes been able to get individual public schools established for prior decades, and Rosenwald and his advisors drew on a national repertoire familiar to leading philanthropists. The coalition's success probably depended in no small measure on the continuity with existing repertoires of political action and the accidental good fortune presented by the convergence of the two repertoires.

Rosenwald Fund monies successfully leveraged the state in another important respect. From the outset, Julius Rosenwald's intent was to "stimulate public agencies to take a larger share of social responsibility" (Embree and Waxman 1949:17). In the early years, state funding accounted for only a small portion of the cost of new Rosenwald schools: only 16 percent of the cost of schools built in the period 1914–1917 with the initial \$30,000 donation, for example (most of which were in Alabama). But the state contribution gradually increased, showing that Rosenwald increasingly engaged the state in its school construction efforts; and in the final years the state was the *major* fi-

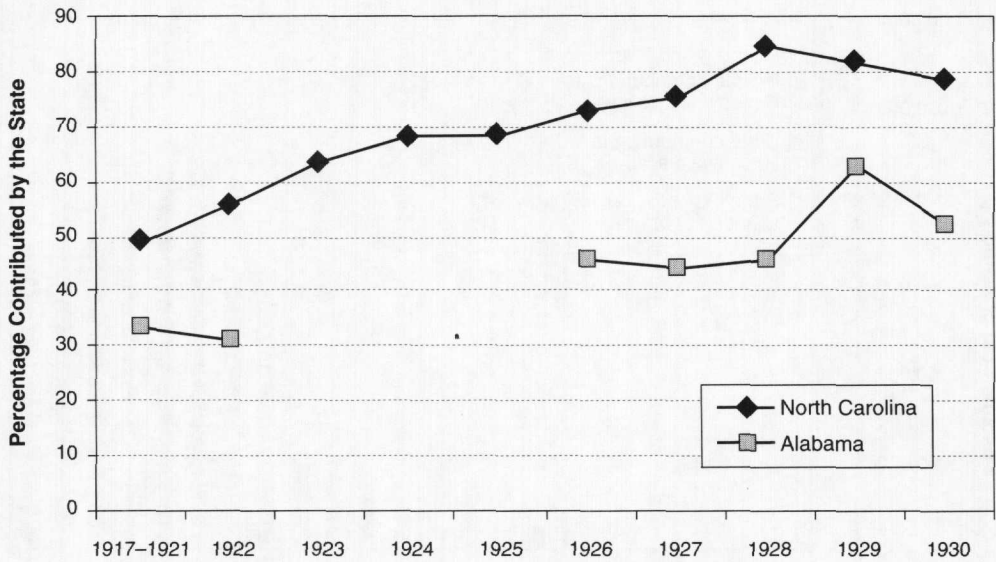


Figure 3. State Contributions to the Cost of Rosenwald Schools: North Carolina and Alabama, 1917–1921 to 1930

Sources: See Figure 1.

Note: For Alabama, the initial figure is for 1921 only, not for 1917–1921.

financial contributor. In the first five years of Fund activity in North Carolina (1917–1921), for example, the state contributed almost half of the cost of new buildings, and the state contribution increased each subsequent year until 1928 when it reached over 80 percent (see Figure 3). The state of Alabama contributed little to the first wave of Rosenwald schools. Of the 92 schools initially built, for which the state funded only 16 percent of their cost, 79 were located in Alabama. By 1921, the state contribution to Rosenwald schools had risen to 33 percent, and it continued to rise, albeit unevenly, until 1929.

IMPACT OF ROSENWALD FUNDING

By 1930, the Rosenwald Fund had altered the landscape of Southern education: One-fifth of all rural school houses for blacks in the South were Rosenwald schools, and about one-third of rural black students were educated in one (Julius Rosenwald Fund Papers, 1928). Put differently, as of 1930, 612,495 African American children were enrolled in 4,762 Rosenwald schools scattered throughout the rural South (Una Roberts Lawrence Papers, 1930). Clearly, the

Rosenwald Fund played a pivotal role in creating public educational opportunities for a generation of African American children. Without Rosenwald funding, it likely would have taken much longer for an adequate system of public elementary education to be put in place for Southern blacks. Further, in North Carolina, annual new spending for schools for blacks did not start to increase significantly until 1920, shortly after Rosenwald funding became available (North Carolina Department of Public Instruction 1904, 1907, 1908, 1910, 1912, 1914, 1917, 1921, n.d.a, n.d.b, n.d.c, n.d.d, n.d.e; comparable data not available for Alabama).

Another indicator of the degree to which Rosenwald funding allowed blacks to improve access to public education is the trend in spending for new rural schools during the height of Rosenwald construction. From 1922 to 1929, the annual cost of building new Rosenwald schools actually exceeded the annual spending for new completely public (non-Rosenwald) rural schools for blacks in North Carolina (Figure 4).

Thus, Rosenwald funding appears to have been responsible for rapid increases in spending on rural public schools for blacks

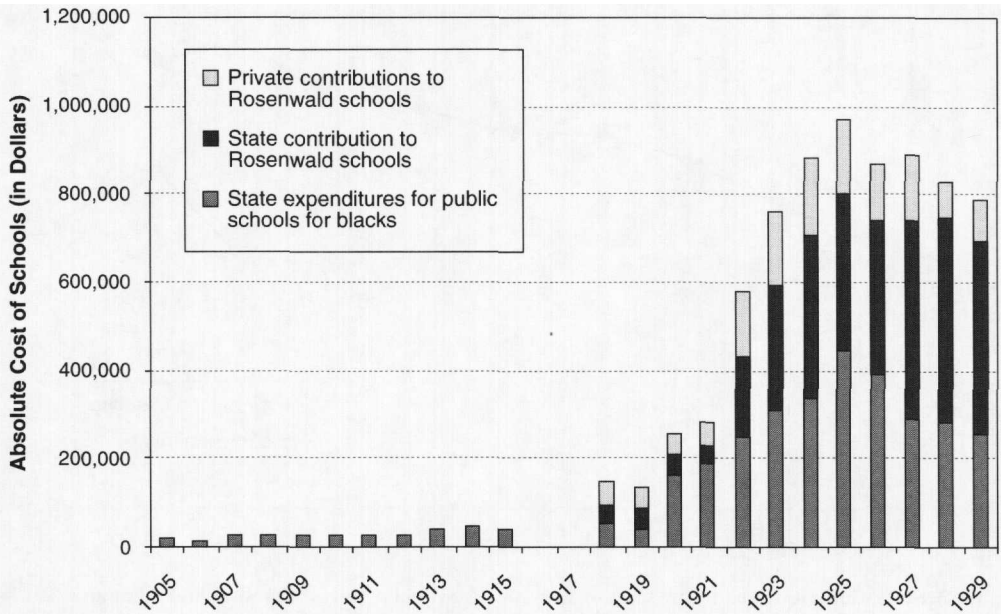


Figure 4. Annual Spending for New Rural Public Schools and New Rosenwald Schools for Blacks in North Carolina, 1905 to 1929

Sources: See Figure 1.

Note: Data on the cost of Rosenwald schools are not available for 1917–1921. For 1918–1921, the figures for Rosenwald school spending are estimated as one-fifth of the total for 1917–1921. “Private contributions to Rosenwald schools” includes monies from the Rosenwald Fund and monies raised privately by local black communities.

in the South and to have significantly increased access to public elementary schools for Southern blacks, owing to the infusion of nonstate funds (Rosenwald funds plus community contributions) and the leveraging of additional state monies for rural public schools for blacks. Nonetheless, during the 1920s, the height of Rosenwald Fund activity, racial inequality in new spending for public schools actually increased, at least for North Carolina (Figure 2).²² Rosenwald and private community contributions for the construction of new rural public schoolhouses for blacks may have allowed local school boards to invest more heavily in new schools for whites than they

²² This is in part because North Carolina, like other Southern states, was building proportionately far more public high schools for whites than for blacks during this period, and high schools were significantly more costly to build than elementary schools (J. Anderson 1988; North Carolina Department of Public Instruction 1921, n.d.a, n.d.b, n.d.c, n.d.d, n.d.e)

would otherwise have done. Nonetheless, it appears likely that African Americans would have had less access to public education in the 1920s and later if local black communities and the Rosenwald Fund had not joined forces to “leverage the state” to build more public schools for rural blacks. The state’s record of funding for new schools for rural blacks before the advent of Rosenwald funding and the remarkable escalation of state funding for these schools after Rosenwald entered the picture clearly shows the difference private leveraging made (see Figure 4). Further, the alliance of local African Americans and the Rosenwald Fund not only leveraged the state’s contribution to school construction; it also leveraged the state’s commitment to ongoing maintenance of the schools. As Dabney (1936) notes, the schools built with Rosenwald funding “are all maintained now by public money. . . . [Thus the state’s] maintenance cost has been increased with the development of the [Rosenwald] schools” (p. 472).

CONCLUSION

Our analyses of the provision of public education for blacks in the South also speak to the more general question of how challenger groups influence state policies concerning social provision.

Changes in state services do not always start with a decision by the state to initiate the service wholly from the public purse. Challengers can affect state policy by initiating state services wholly or partly with private funds and doing so in a manner that encourages or compels the state to fold the service into the state and the state to continue its operation. Our study reinforces the importance of factors identified in the literature on challenger influence on state policy-making: (1) an opportunity to create an alliance with elites (although in our case it was an elite without local political standing or power), (2) an organizational structure to leverage the state (although in our case the elite ally and the challenger groups had different organizational structures that complemented each other), (3) access to financial resources (on the part of the challenger group and its ally, in our case), and (4) a modification of known forms of action (although in our case elite allies and challengers drew from different repertoires that turned out to be complementary and mutually reinforcing).

Like others, we find that the political opportunity structure that challengers confront also matters. For example, blacks were able to wield less direct political influence on educational policy when party politics were less competitive and after they lost key political and civil rights. An important contribution of our study, however, is our finding that the absence of citizenship rights strongly affects the *forms* of political action that are possible and/or desirable on the part of challengers, but it does not shut them out of policymaking altogether. Compared with challengers who possess citizenship rights, challengers without citizenship rights have fewer strategies available to them for affecting state policy, and they may be more likely to engage in leveraging politics *for purposes of securing social rights*—political and civil rights cannot be leveraged with private funds. In our case, disfranchised blacks, in

alliance with Northern philanthropists, used large amounts of private money to secure an infusion of even larger amounts of public funds for building an adequate system of public elementary education for blacks in the early twentieth-century South. This limited form of political influence imposed a burden of double taxation on the challengers, but it allowed southern blacks to partly achieve their educational policy objectives when they were completely excluded from formal politics and when state repression and the loss of civil rights made protest and insurgency prohibitively costly.

The importance of leveraging politics extends far beyond the specifics we have addressed here. Our ongoing research on school reform movements in the North and South at the turn of the century indicates that leveraging politics was crucial for other public educational policy developments. For example, throughout the country, women's clubs and other civic groups used private funds to establish free kindergartens inside public schools, leading to the widespread incorporation of free kindergartens as a state responsibility (Reese 1986; Scott 1991; Thomas 1992). Settlement houses often inaugurated new programs that were later taken over by the public schools, such as adult education classes and vacation schools; they also raised funds for playgrounds established directly within the public sector (Davis 1967; Woods and Kennedy [1911] 1970).

At least two other forms of state provision owe their origin to leveraging politics. Carnegie's campaign to build public libraries, based on a combination of public and private funding and with a commitment extracted from the state to assume responsibility for the continued operation of the libraries, may have been the model for Rosenwald. Leveraging politics also appears to have been important for the development of state public health services (Link 1986, 1988). For example, the Rockefeller Sanitary Commission, founded in 1909, was highly successful in its Southern hookworm campaign, in part because it helped create "permanent state and local public health agencies" (Link 1986:152). In short, leveraging politics deserves further attention as a means of affecting state-provided social rights in general, not just educational rights.

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