Moving from Startup to Sustainability

New Hampshire Charter Schools Conference
September 20, 2023

Join at menti.com use code 4750 0117

Ment

BF

Account

Content

Design

Settings

Madcap presidential primary jockeying notwithstanding, my favorite autumnal pastime in New Hampshire is . . .

Waiting for responses ...

Help & Feedback

Join at menti.com use code 4750 0117

Which type of growth initiative is most relevant to you based on your school's history and future trajectory?

GO TO
menti.com
ENTER THE CODE
4750 0117

Men

BF
Account
Content
Design
Settings
Help & Feedback

Join at menti.com use code 4750 0117

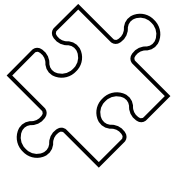
Mentimeter

Maintaining quality while transitioning from startup to sustainability is surpassingly difficult.

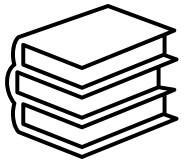
S chools historically been hellbent on growth?

A Cautionary Tale

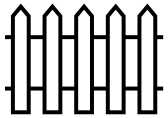
Objectives



SAWBAT articulate the competing considerations that operators face while transitioning from start-up to sustainability



SAWBAT develop a critical understanding of how (a) to mitigate foreseeable growing pains, and (b) to meet demand without compromising quality



SAWBAT identify the factors that complicate efforts by charter operators to engage in long-term planning efforts and explain why it is nevertheless important that they do so with care and intentionality

SAWBAT understand how to initiate or accelerate a scale-up effort without sacrificing quality

Agenda

1. Charter School Growth [Background and Theoretical Overview]
2. Barriers to Achieving Sustainability
3. Mitigating Foreseeable Growing Pains: Strategic, Sustainability, and Succession Planning

Charter School Growth [Background and Theoretical Overview]

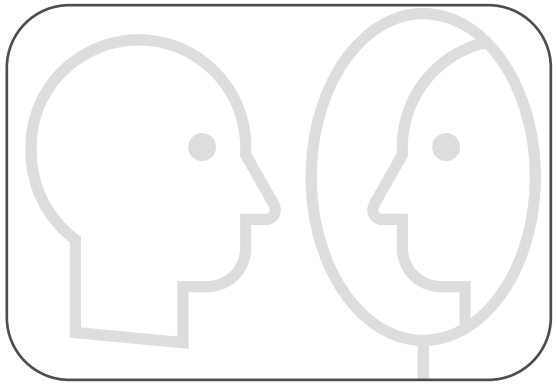
Original Conception vs. Reality in Practice

- Original Conception: Labs of innovation that use their heightened autonomies to pilot novel practices for dissemination to traditional public schools
- Reality in Practice: Isomorphic convergence
- Upshot: Increased homogeneity . . .
- . . . which can be desirable in some instances so long as newly added seats approximate the quality of those on which they were based!

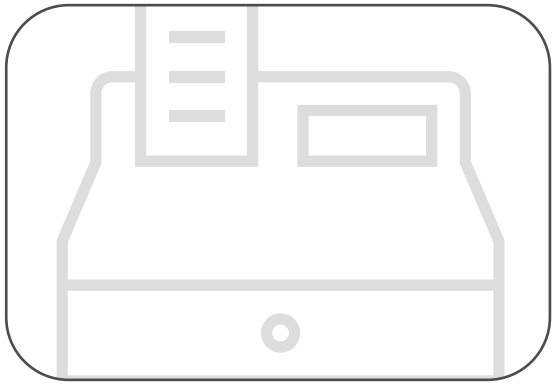
Environmental Factors that Incentivize Growth

- Regulatory frameworks designed to impede rapid expansion
- Funding (public & private)
- Streamlined authorization & oversight processes
- “Proven provider” carveouts (charter caps, enrollment ceilings, geographic restrictions)

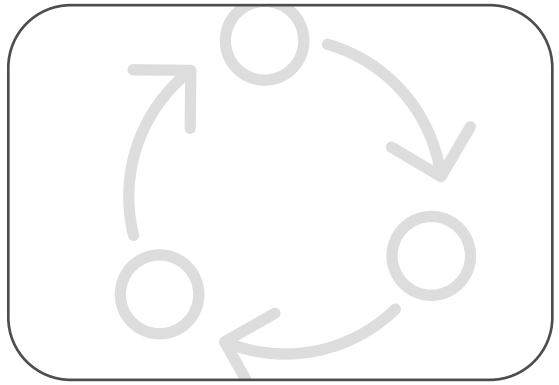
Internal Considerations That Drive Growth



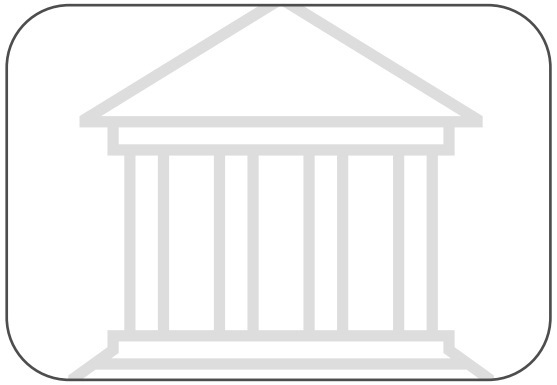
Mission Imperatives



Budgetary Demands



Operational Realities



Political Pressures

Join at menti.com use code 4750 0117

Ment

BF

Account

Content

Design

Settings

Help & Feedback

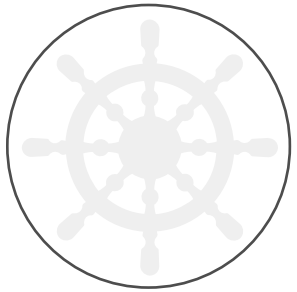
Totally Insignificant

Highly Significant

GO TO
menti.com
ENTER THE CODE
4750 0117

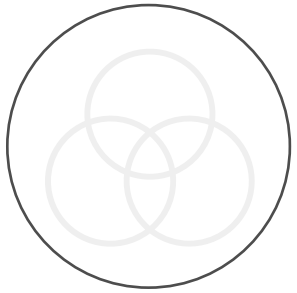
Barriers to Achieving Sustainability

Common Challenges Encountered During Growth



Leadership Pipelines

Teacher Burnout / Turnover



Tension Between Standardization & Differentiation

Leadership Pipelines

- Idiosyncratic models place premium on familiarity, heighten dislocations associated with turnover (Gawlik, 2015; Ni et al., 2015)
- Absent strong leadership, attempted implementation of "a laundry list of programmatic characteristics may only lead to limited success" (Hays, 2013)
- Structured training models deployed by CMOs tend to provide a stronger foundation than the reactive, self-directed approach typically offered at standalones (Torres et al., 2018)
- Flipside: grueling "stretch assignments" featured in CMO training programs may accelerate burnout and turnover (Higgins & Hess, 2009)

Teacher Burnout / Turnover

- “Short supply of saints” (Wilder & Jacobsen, 2010)
- Model success predicated on talented, high-energy staff working long hours with an evangelical zeal (Higgins & Hess, 2009)
- Teachers expecting to exercise autonomy may bristle when expected to implement prescriptive instructional and disciplinary models (Torres, 2014)
- Teachers at standalone schools crave the very systems, supports, and procedures that may cause CMO-affiliated teachers to chafe (Torres, 2014)

Tension Between Standardization & Differentiation

- Standardization necessary to run a coherent school or system; school-level autonomy, experimentation, and innovation endemic to charter sector (Wohlstetter et al., 2015)
- “Rote, mechanistic implementation” leads to “resistance” or “blind compliance”; need active engagement in adaptation (Peurach & Glazer, 2012)
- Idea that success is predicated on strict adherence to “proven” practices is likely to preclude reevaluation of model (Higgins & Hess, 2009)

Join at **menti.com** use code **4750 0117**

Mentimeter

From the perspective of your school, rank the following challenges to high-quality growth from most to least relevant:

1st Leadership Pipelines

2nd Teacher Burnout / Turnover

3rd Tension Between Standardization & Differentiation

Poor first year performance simply cannot be overlooked or excused. . . . Once this has happened, the future is predictable and extremely bleak.

Peltason & Raymond (2013)

Typology of Approaches to Growth

- Premeditated: clearly delineated planning & management activities, long-range vision based upon defined growth objectives
- Organic: growth plans develop in response to changing pressures, demands, circumstances
- Opportunistic: growth based entirely on the availability of resources (e.g., facilities, school leaders, money, community support) deemed essential

Farrell et al., 2013

Before embarking on a growth initiative, consider the following questions...

1. To what extent is growth consistent with the fulfillment of our mission?

Join at menti.com use code 4750 0117

Ment

BF
Account
Content
Design
Settings
Help & Feedback

GO TO
menti.com
ENTER THE CODE
4750 0117

isaligned

Perfectly Aligned

Before embarking on a growth initiative, consider the following questions...

1. To what extent is growth consistent with the fulfillment of our mission?
2. Do we have the capacity to add seats without compromising the quality of our educational programming?

Join at **menti.com** use code **4750 0117**

Ment

BF

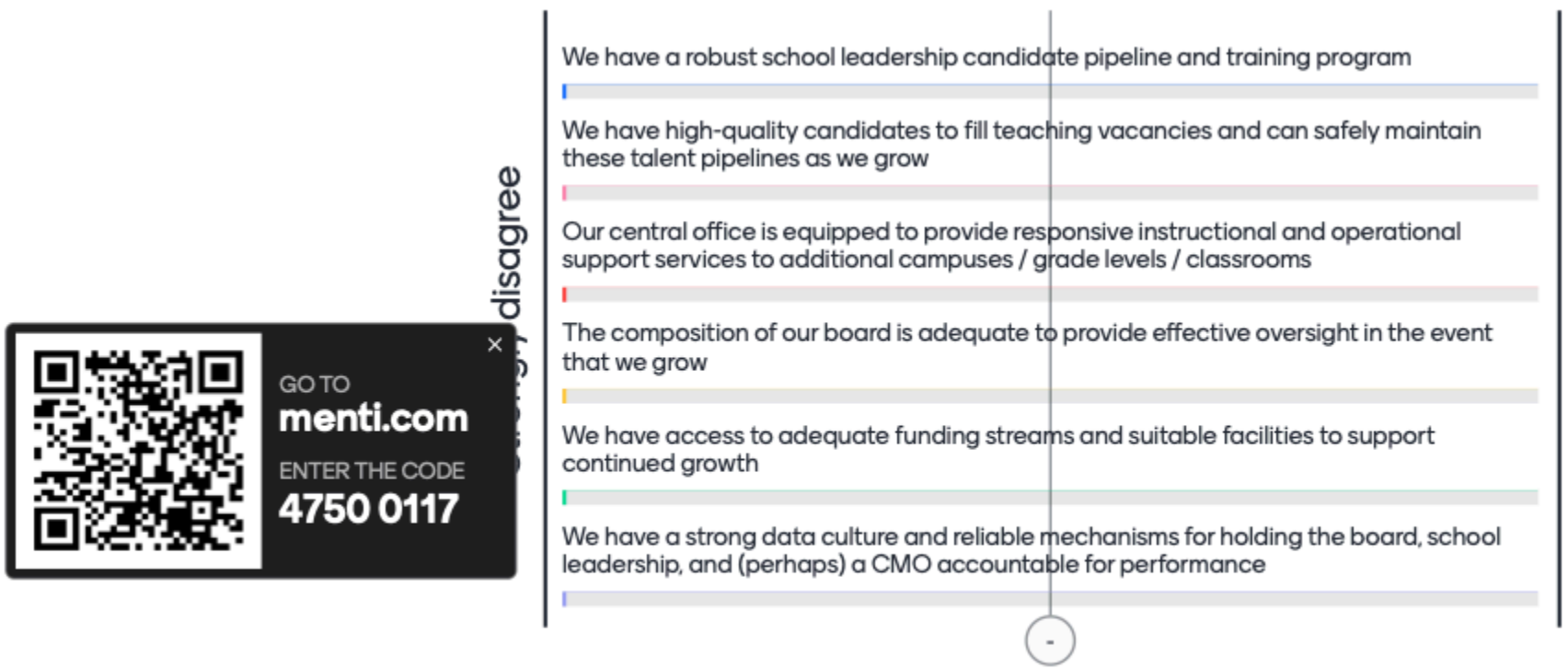
Account

Content

Design

Settings

Help & Feedback



GO TO
menti.com
ENTER THE CODE
4750 0117

Before embarking on a growth initiative, consider the following questions...

1. To what extent is growth consistent with the fulfillment of our mission?
2. Do we have the capacity to add seats without compromising the quality of our educational programming?
3. Is there unmet demand for the model we are providing?
   - Will we have the enrollment to support our budget?

Before embarking on a growth initiative, consider the following questions...

1. To what extent is growth consistent with the fulfillment of our mission?
2. Do we have the capacity to add seats without compromising the quality of our educational programming?
3. Is there unmet demand for the model we are providing?
   - Will we have the enrollment to support our budget?
4. To what extent is our program well-designed to serve the students and families in the community in which these seats will be located?

Before embarking on a growth initiative, consider the following questions...

1. To what extent is growth consistent with the fulfillment of our mission?
2. Do we have the capacity to add seats without compromising the quality of our educational programming?
3. Is there unmet demand for the model we are providing?
   - Will we have the enrollment to support our budget?
4. To what extent is our program well-designed to serve the students and families in the community in which these seats will be located?
5. To what risks would growth expose us, and to what extent are we prepared to mitigate them?
   - Reputational risk / Brand maintenance
   - Accountability risk
   - Financial risk
   - Political risk

Join at menti.com use code 4750 0117

Ment

BF

Account

Content

Design

Settings

From the perspective of your school, rank the following potential risks associated with growth from most to least concerning

1st Reputational risk / Brand maintenance

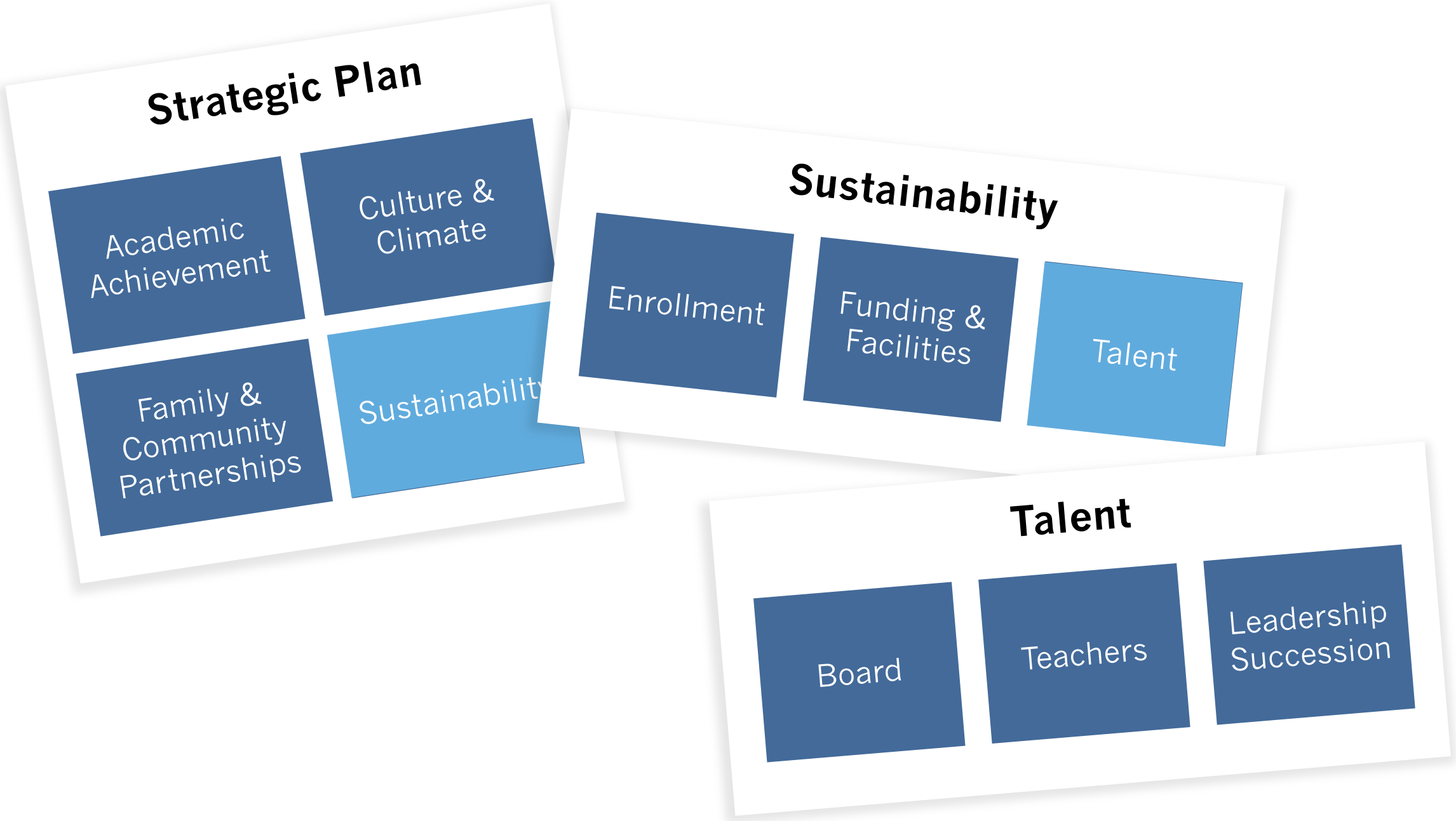
2nd Accountability risk

rd Financial risk

th Political risk

Help & Feedback

Mitigating Foreseeable Growing Pains: Strategic, Sustainability, and Succession Planning


Strategic Plan
Academic Achievement
Culture & Climate
Family & Community Partnerships
Sustainability
Sustainability
Enrollment
Funding & Facilities
Talent
Talent
Board
Teachers
Leadership Succession

Strategic Planning

- Purpose
- Process
- Product
- Predictive Value / Periodic Review

Join at menti.com use code 4750 0117

Ment

BF

Account

Content

Design

Settings

From your perspective, what value can be derived from undertaking a strategic planning process?

Help & Feedback

Strategic Planning

- Purpose
- Process
- Product
- Predictive Value / Periodic Review

To examine the school's mission, vision, and key design elements, identifying which to reaffirm and which to reimagine

To signal to all community members that their input is valued by actively engaging them in the planning process

To determine how to accentuate the school's strengths and mitigate its weaknesses based on an assessment of internal capacity and external conditions

To articulate a vision for how a school pursues its mission over the next five years

To chart a course for the school's future while honoring the work that has taken it to this point

To align all stakeholder groups around a shared vision for how a school community moves forward

To establish goals against which trustees can hold both themselves and their leadership teams accountable

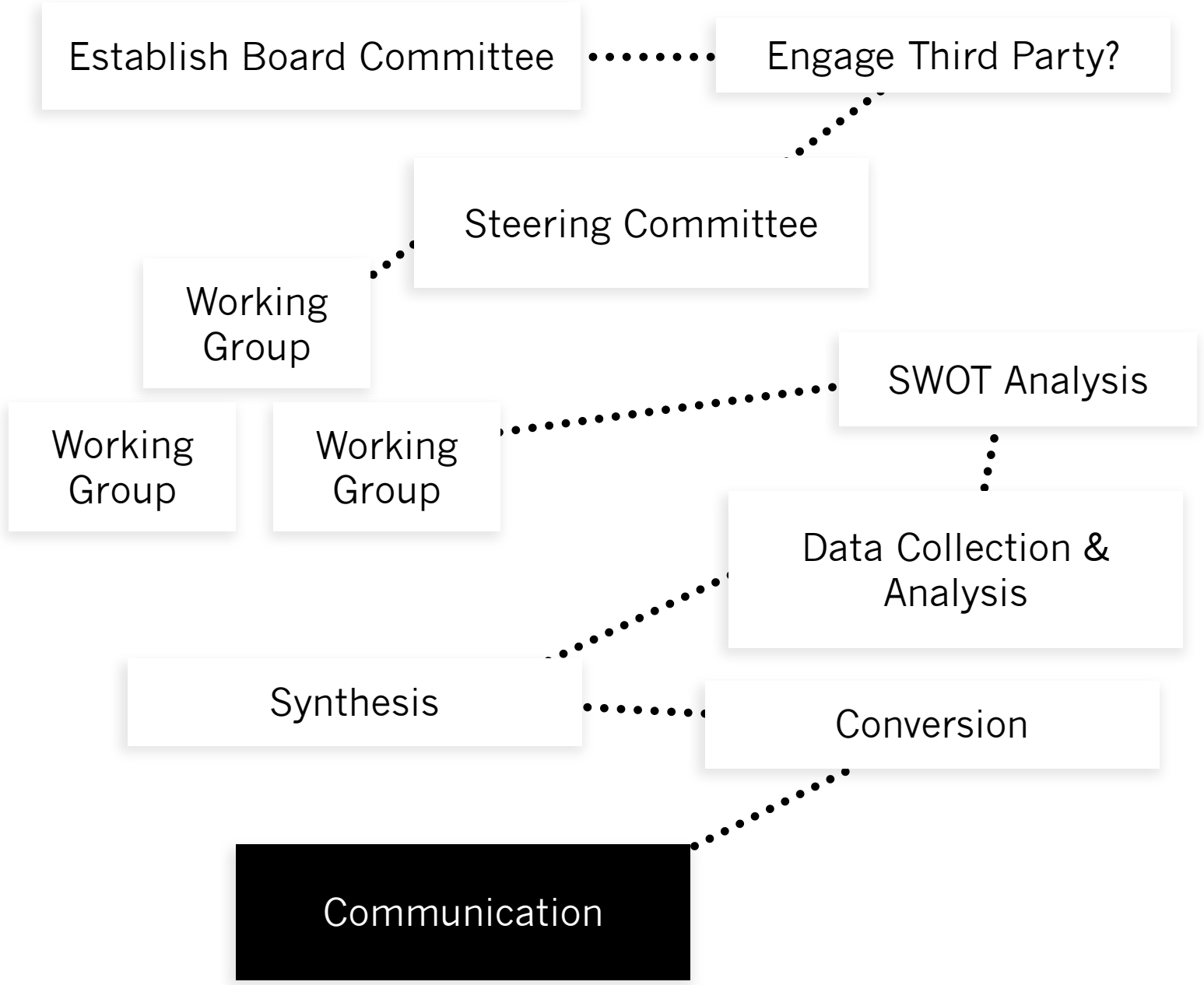
To set goals, establish timelines, and identify the activities, resources, and individuals that will support the plan's implementation

To conduct an honest appraisal of how the school is perceived by a range of stakeholders across a host of domains

To drive the creation of a data dashboard

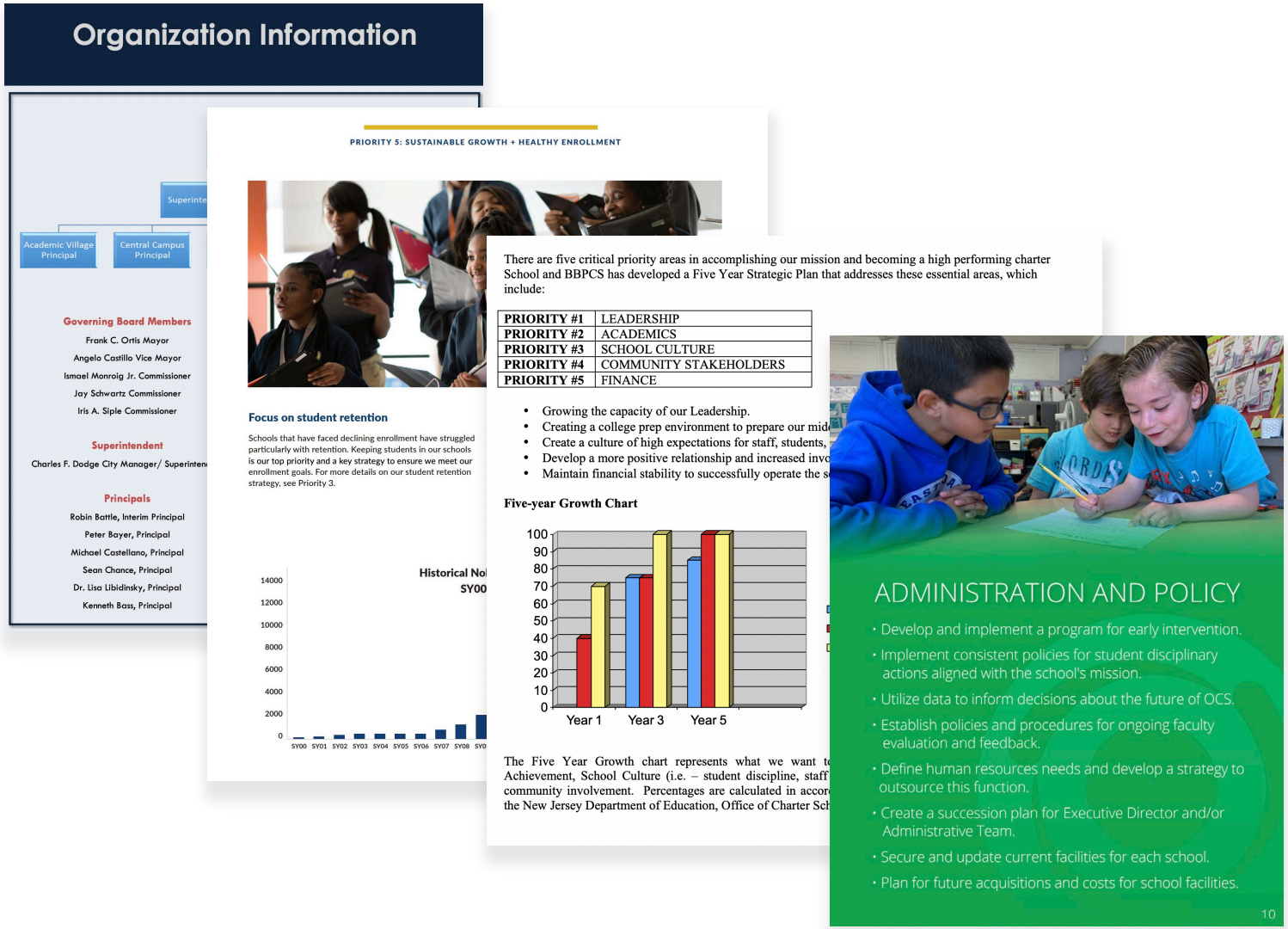
Strategic Planning

- Purpose
- Process
- Product
- Predictive Value / Periodic Review



Strategic Planning

- Purpose
- Process
- **Product**
- Predictive Value / Periodic Review



Strategic Planning

- Purpose
- Process
- Product
- Predictive Value / Periodic Review

Strategic Plan

Overview

- Continued growth in the Governance and Administrative leadership of the school.

Justification

- The Lead Administrator, in collaboration with the Board of Trustees, will regularly review, develop, and if necessary, amend the school's charter mission to promote student achievement.

PRIORITY #2: ACADEMICS

Overview

- Successfully achieve high scores on the State administered standardized test: PARCC
- Achieve recognition as a Blue Ribbon Charter School
- Create a college preparatory curriculum
- Promote academic excellence in the areas of Math, Language Arts Literacy, Science, and Social Studies
- Establish a high class technological infra
- Incorporate technology in all aspects of i

Justification

The Benjamin Banneker Preparatory Charter S
and academic excellence. We want our scholars
Math and Science. BBPCS will update its aca
State Standards. BBPCS will create a rigo
encourages all students to embrace life-long lea
and implement a comprehensive Science, Tech
enhances student learning. It is the goal of th
helping our scholars achieve in the 21st century.
curriculum and our pursuance of evolving into

School Leader Evaluation

Standard 4. CEO Leadership and Organizational Management
A Lead Administrator is an educational leader who promotes the success of all students by leadership and management of the organization, operations, and resources for a safe, efficient, and effective learning environment.

☐ Exceeds Expectations ☐ Meets Expectations ☐ Below Expectations

Comments:

Standard 5. CEO Leadership and The Technical Core of Curriculum Planning and Development
The Lead Administrator is an educational leader who promotes the success of all students by facilitating the design and implementation of curricula and strategic plans that enhance teaching and learning: alignment of curriculum, curriculum resources, and assessment; and the use of various forms of assessment to measure student performance.

☐ Exceeds Expectations ☐ Meets Expectations ☐ Below Expectations

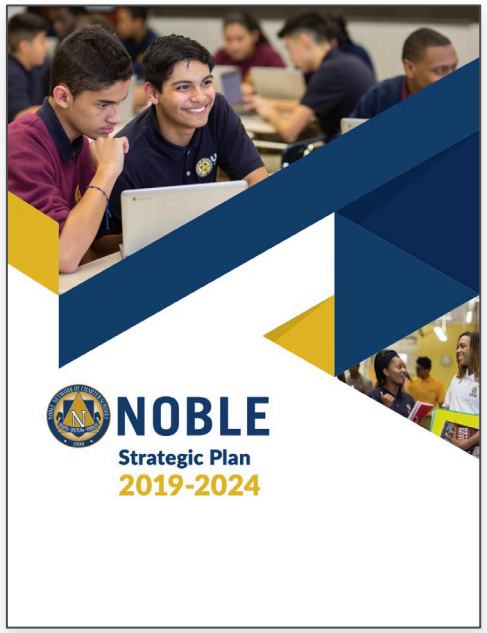
Comments:

Standard 6. CEO Leadership and Instructional Management
The Lead Administrator is an educational leader who promotes the success of all students by advocating, nurturing, and sustaining school culture and instructional program conducive to student learning and staff professional growth.

☐ Exceeds Expectations ☐ Meets Expectations ☐ Below Expectations

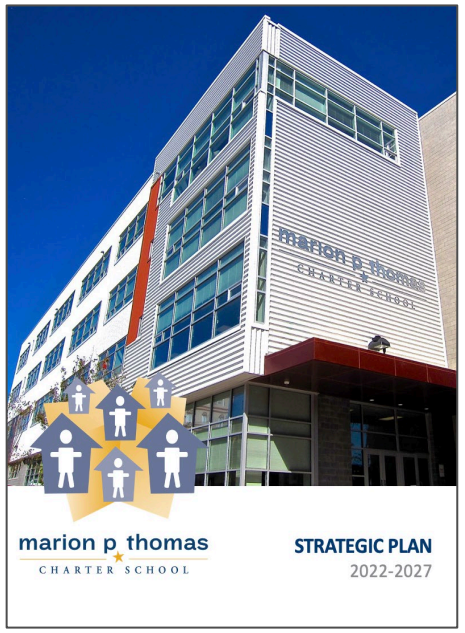
Comments:

Strategic Planning Resources

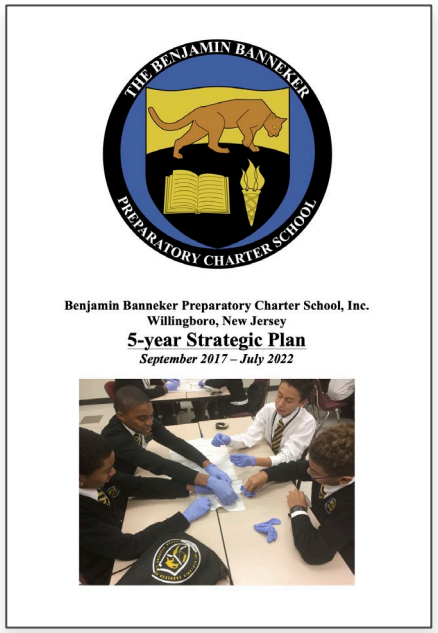


Noble Schools, 2019-2024

Odyssey Charter Schools, 2019-2024



Marion P. Thomas Charter School, 2022-2027



Benjamin Banneker Preparatory Charter School, 2017-2022

Sustainability Planning

Although schools may deliberately plan around per-pupil allocations, it is under-enrollment that seems to spark the classic death spiral of many schools: low enrollment, producing low revenues, producing marginal academic programs, driving enrollment down further still.

Christian P. Wilkens,
How to Lose Your Charter
Journal of School Choice, 2013

Join at menti.com use code 4750 0117

Men

BF

Account

Content

Design

Settings

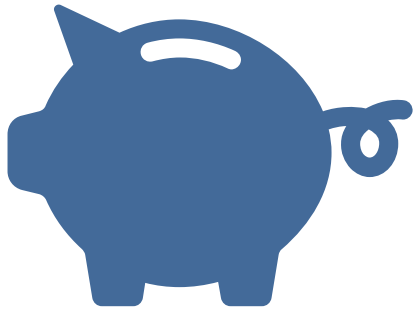
Help & Feedback

GO TO
menti.com
ENTER THE CODE
4750 0117

Woefully ineffective

Highly effective

Sustainability Planning



Public

- Title
- IDEA
- McKinney-Vento
- ESSER
- E-Rate
- Perkins
- CSP

Private

- Foundations
- Corporations
- Individuals

Availability

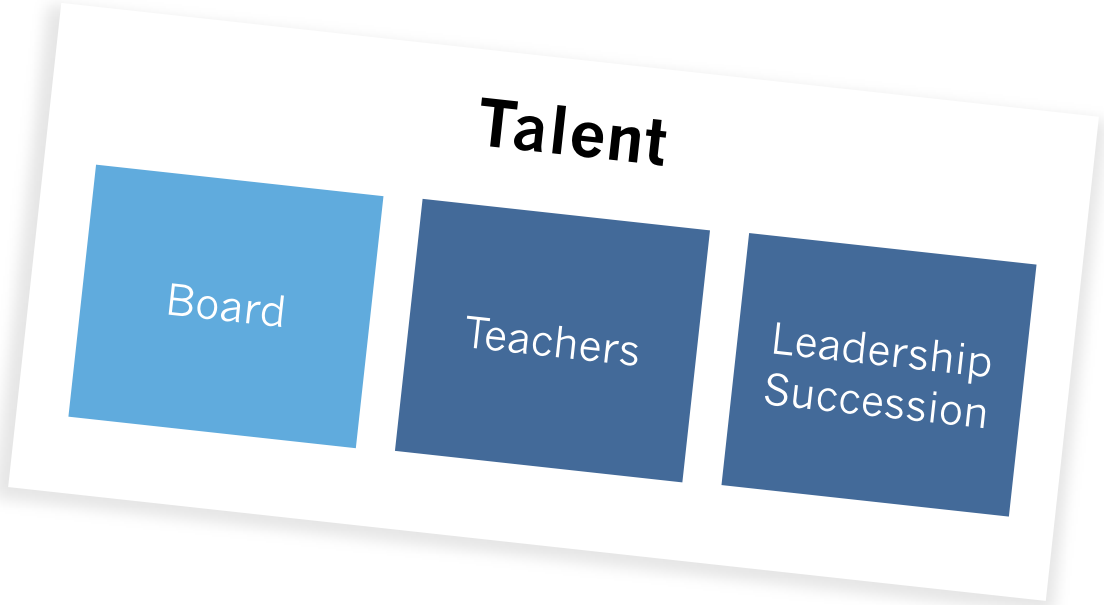
Capacity

Suitability

Affordability

Enrollment | Funding & Facilities | Talent

Sustainability Planning



Governance —> Sustainability

- Institutional knowledge
- Credibility
- Caretaker of key relationships

Focus Areas

- Recruitment pipelines
- Training
- Development and deployment of effective structures and practices

Enrollment | Funding & Facilities | Talent

Join at **menti.com** use code **4750 0117**

From the standpoint of creating sustainable governance practices, rank order your board priorities from most to least pressing

1st Cultivating pipelines of new trustees

2nd Training and ongoing development (individual and collective)

3rd Developing and deploying effective structures and practices

Account

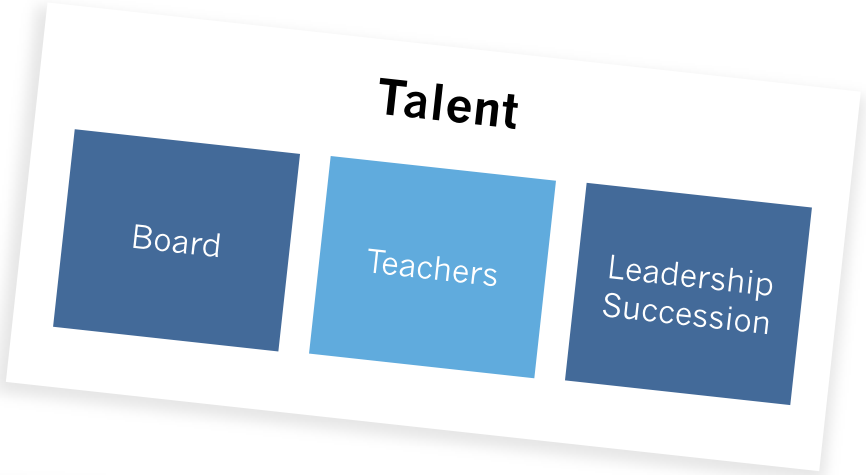
Content

Design

Settings

Help & Feedback

Sustainability Planning



The teacher shortage is real, large and growing, and worse than we thought. In the past decade, the interest in teaching as a career has dwindled, jeopardizing the quality of the education that children in America's public K–12 schools are receiving.

Vanishing teachers
According to most recent data, 13.8% of teachers are either leaving t… teaching altogether after the school year, creating vacancies behind…

13.8% of teachers aren't in their position a year after:
6.5% left the school but remained in the profession (turnover) and **7.3%** left t…

86.2% of teachers stay

Shrinking supply
High turnover and attrition is not the only problem. The number … career in teaching significantly declined from 2008 to 2016.

↓**15.4%**
drop in number of people awarded education degrees

↓**37.8%**
drop in number of people enrolled in teacher preparation programs

drop in numb… teacher preparation programs

Teachers don't have a say in their professional development opportunities

8 in 9 teachers have less than a great deal of influence determining the content of their professional development

Teachers' satisfaction with professional development is low

1 in 4
find subject-specific professional development very useful

1 in 4
find professional development related to using computers for teaching very useful

1 in 5
find professional development related to student discipline and classroom management very useful

Emma Garcia & Elaine Weiss,
Examining the factors that play a role in the teacher shortage crisis
Economic Policy Institute, 2020

Sustainability Planning

Enrollment | Funding & Facilities | Talent

Join at **menti.com** use code **4750 0117**

Ment

BF

Account

Content

Design

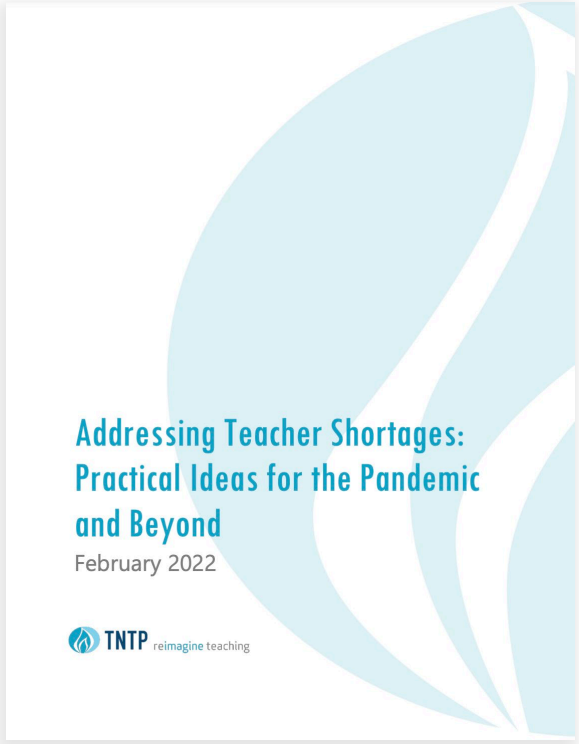
Settings

Which aspect of sustainability planning feels most urgent to you at this particular moment in time?

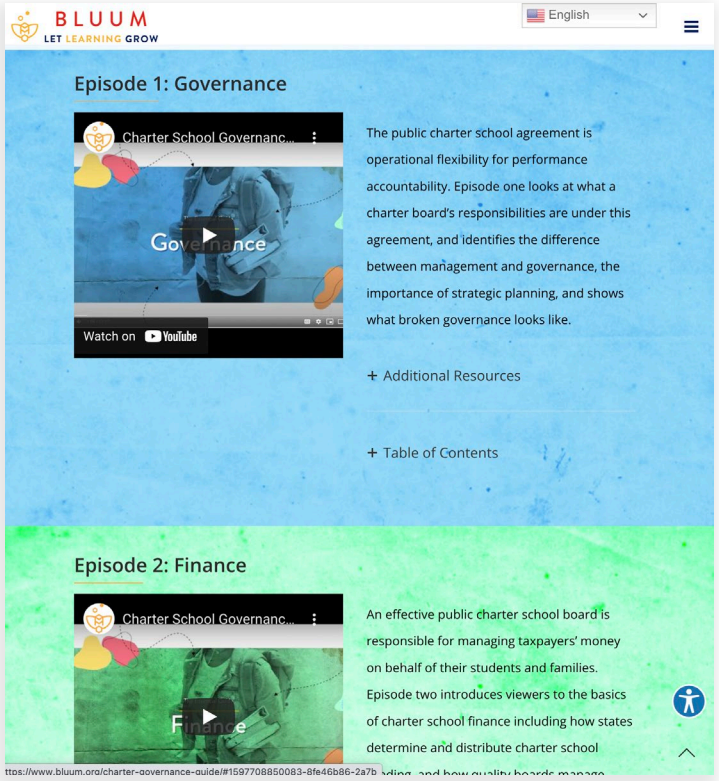
GO TO
menti.com
ENTER THE CODE
4750 0117

Help & Feedback

Sustainability Planning Resources



[Addressing Teacher Shortages: Practical Ideas for the Pandemic and Beyond, TNTP, February 2022]



[Charter School Governance, The Essential Guide, BLUUM]

Enrollment | Funding & Facilities | Talent

Why challenges associated with leadership turnover are heightened in charters

- Centrality of smooth succession to sustainability: continuity, culture, & climate
- Unique features of charters
  - Specificity of mission
  - Gravitational pull of founders
  - Limited opportunities to cultivate a deep bench
- Unique features of charter leadership
  - Nature of role often requires handling responsibilities traditionally associated with both school leadership and district leadership
    - Board, funder, and political relationships
    - Legal
    - PR

Barriers to Succession Planning

Role Uncertainty

Conflict Avoidance

Funding

Complacency

Time Constraints

Finite Resources

Politics

Join at menti.com use code 4750 0117

Which barrier to succession planning resonates most profoundly with you?

GO TO
menti.com
ENTER THE CODE
4750 0117

Ment

BF
Account
Content
Design
Settings
Help & Feedback

Best Practices

Maintain Transparency

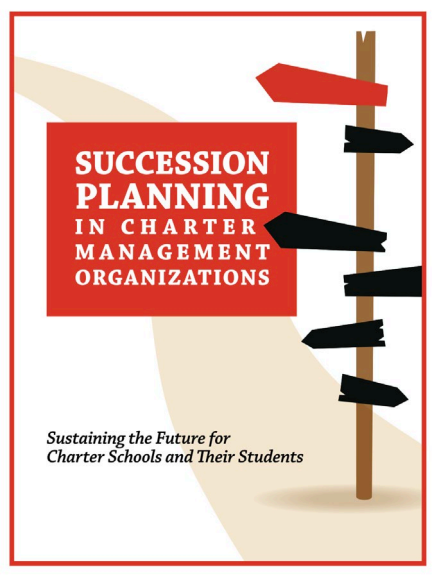
Distinguish Between Emergency & Intentional

Tie into Strategic Plan

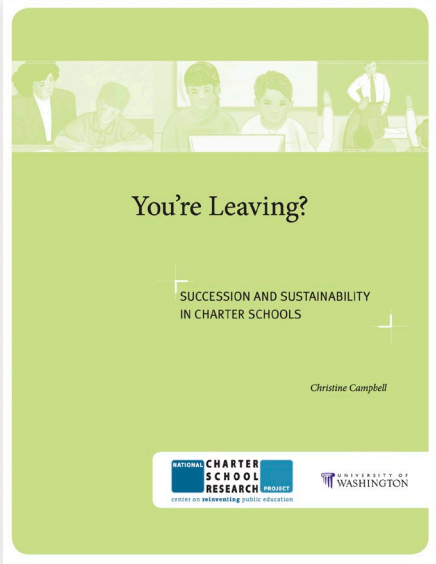
Assign Responsibility to a Board Committee

Build Your Bench

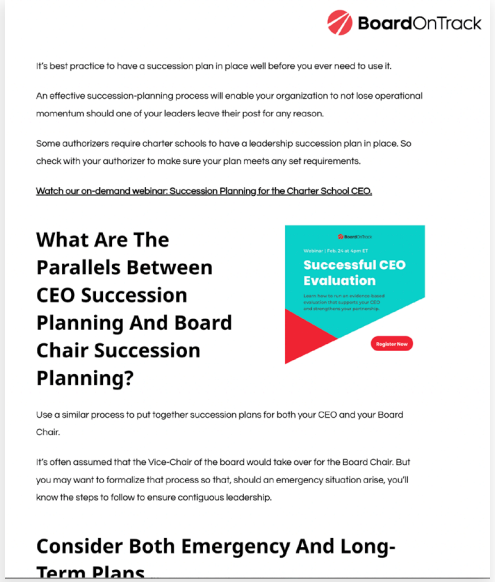
Succession Planning Resources



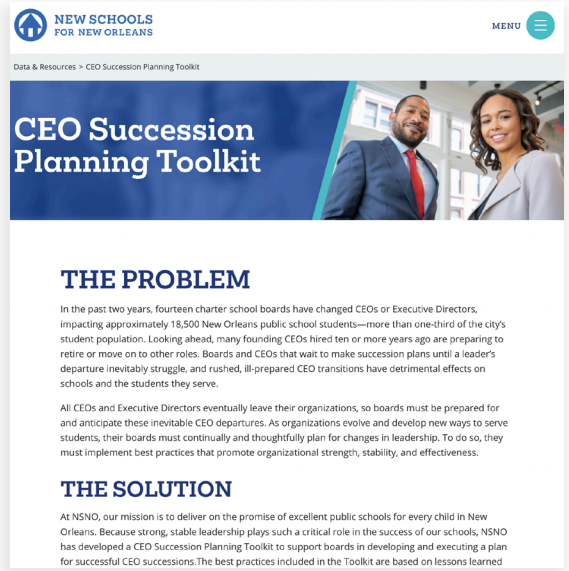
[Succession Planning in Charter Management Organizations (Gates Foundation)]

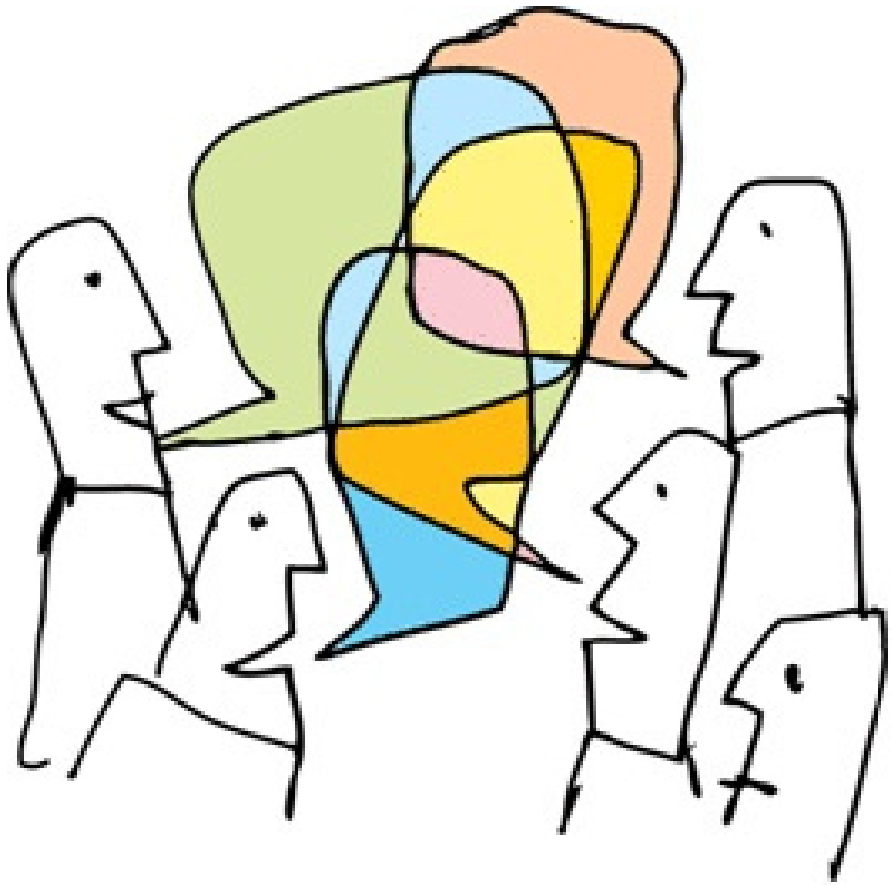


[You're Leaving? Succession and Sustainability in Charter Schools (National Charter Schools Research Project)]



[Succession Planning for Charter School Boards and CEOs (Board On Track)]



[CEO Succession Planning Toolkit (New Schools for New Orleans)]

Open Discussion