



PHOTOGRAPH / SCOTT SUCHMAN

*Carrie Irvin and Simmons Lettre
(pictured on right) founded
Charter Board Partners*

BOOT CAMPS FOR CHARTER BOARDS

FINDING AND TRAINING CIVIC-MINDED LEADERS



THE 7:40 P.M. agenda item at a meeting of Washington, D.C.’s charter-school authorizer, the D.C. Public Charter School Board, was a “discussion” about a school for 700 low-income, African American girls.

As authorizing-board members listened in stony silence, the school board’s new chair explained that a recent “self-assessment” revealed that staffers had been misusing school credit cards, teacher retention was miserable, the front office was staffed “like a Fortune 500 company,” and two-thirds of the previous year’s students hadn’t verified that they were D.C. residents and eligible to attend at D.C. taxpayer expense. Among the non-D.C. students: the enrollment manager’s daughter.

Whose responsibility is it when a charter school gets into trouble—when its students aren’t learning or it misses its enrollment targets or money runs short or it closes?

by JUNE KRONHOLZ

Everyone I asked gave the same answer. “I’d point right to the board,” said Mark Lerner, who sits on the board of Washington Latin charter school. “The failure of a charter is the failure of the board,” said Tom Keane, who directs strategic initiatives at AppleTree, an early-learning charter with six D.C. campuses. “Every closure ultimately can get traced back to the board not doing the job,” added Marci Cornell-Feist, a Massachusetts-based education consultant and entrepreneur.

Which is why, on a warm fall day, an organization called Charter Board Partners (CBP) gathered a World Bank strategist, a couple of advertising executives, a behavioral psychologist, a retired English teacher, a former Exxon executive, and perhaps two dozen other professionals for what it called a governance boot camp.

Since its 2010 launch, Charter Board Partners has recruited, trained, and placed 100 people like these onto D.C. charter-school boards. At the end of this boot camp, another 67 candidates were ready to join boards that ask for them. About two dozen boards—not quite half of the charter-school boards in D.C.—already contract with CBP, paying up to \$15,000 a year for CBP’s matchmaking services, governance workshops, personal coach, and help with such problems as how to “pre-plan” a school leader’s succession or how to move board paperwork online.

With Gates Foundation funding, the group has opened a Seattle office in anticipation of the opening of the first charter schools there. And with Walton Family Foundation money, it expects to open a third office in 2015.

CBP’s boot camp began simply enough with a lecture on what, exactly, a charter school is. But the discussion quickly moved to governance nuts and bolts: committee organization, budget oversight, school-leader evaluations, and, by afternoon, a mock charter-school board meeting.

“You don’t have to get into the weeds on academics,” said Simmons Lettre, who along with Carrie Irvin founded CBP. Reading scores and math achievement are the job of the school leader, she told the board candidates. But just as a sigh of relief seemed to spread around the room, she reminded them that the school leader works for the board. “At the end of the day, you own student achievement,” she said. “The stakes are crazy high.”

Charter Board Pitfalls

In the 2013–14 school year, 651 new charter schools opened around the country, and 202 charters closed, a 3-to-1 ratio that has held steady for the past five years, according to the National Alliance for Public Charter Schools, an advocacy and research group.

The closure rate is even higher in Washington, D.C., where almost half of public school children—more than 38,000 kids—attend charters. Of the 102 charters that have been granted in D.C., 39 have either been revoked by the city’s authorizer or relinquished by the charter holder. Another 10 charter holders have closed one or more school campuses, or dropped troubled middle- or high-school programs.

AppleTree’s Tom Keane says that’s part of the bargain that charters make with the taxpayers in return for freedom from most school-district rules. “Part of the idea behind charters is that they could fail.”

D.C.’s charter authorizer cites low enrollment or inadequate academic achievement for many of the closures, but “financial and management deficiencies” contributed to at least 16 closures and “governance” problems to another 4 since 1998.

Charter laws vary from state to state, but typically, authorizers award school charters to a governing board, not to a school’s founders or managers. Those boards own the school

buildings and hire a lead manager—their only employee—to implement their strategic plan. Charter-school boards generally follow a governance model used by most U.S. corporations and nonprofits: they write their own bylaws, elect officers, organize committees as they choose, and perpetuate themselves by inviting new members to replace those who retire.

Thomas Nida, a banker and former head of D.C.’s charter-authorizing board, says problems typically begin when a school buys or builds a new facility and then, perhaps, expands enrollment to fill it. In the scenario he paints, construction costs nibble into the academic budget (oops, there goes the reading specialist), the school leader’s attention is diverted, and those additional kids change the school’s carefully crafted culture.

Board members would have approved the new building and the expanded enrollment, Nida adds, but many lack



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feature

CHARTER BOARDS KRONHOLZ

experience running a start-up with a multimillion-dollar budget (Friendship Charter, the city's largest, had 2012–13 revenues of \$73.3 million). They underestimate the time involved: AppleTree's Tom Keane, who sits on his charter's finance committee, says those meetings alone run three hours and are held eight times a year.

Especially at a start-up, the group that applied for the charter may be too invested in it, or just too busy getting the lights turned on to give proper oversight. And a charismatic founder who's used to running the show may have trouble sharing responsibility with a board. Cynthia Brown, the new board chair of D.C.'s Perry Street Prep, told me that the board was

attention to how well the schools are governed. D.C.'s charter-authorizing board, for example, reviews the meeting minutes of all 61 local charter-school boards and calls in those whose schools seem troubled.

Meanwhile, CBP and a tiny handful of other organizations have begun focusing attention and training on the people who govern charter schools.

Looking For, and Training, Doers

BoardOnTrack, an online site launched by Cornell-Feist, leads board members through a catalog of lessons, like what



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so "dominated" by the school's founder that members weren't aware of the school's academic shortcomings. The founder eventually was fired, but the school lost the charter for its new high-school program. "It was traumatic," Brown said.

The school-closure rate will fall as the charter sector matures, I was repeatedly assured. In part, that's because authorizers, bankers, and donors are paying increasing

the finance committee does and who should be on it. "We provide a slow, steady drip of professional development," says Cornell-Feist, who also helped found Achievement Network (see "Teaching the Teachers," *features*, Summer 2012) and, by her count, six other education start-ups.

Her site asks board members to evaluate themselves—asking, for example, if they know the key promises that they made

to their authorizer—and encourages them to compare their board to others in the BoardOnTrack network by using the self-evaluation data. Cornell-Feist expects the comparisons will be motivating for board members and will give her the data to track improvements in each board. Some 150 schools in 22 states already use the site, she adds.

Likewise, Thomas Nida, the Washington banker, says he is in talks with two universities to offer board-member training through their education schools. Included in the curriculum that Nida already has piloted on four boards are lessons on aligning the budget with school goals and “working with the school leader.”

The application form that would-be board members fill out for CBP makes clear that it’s looking for doers, not simply do-gooders. Do you have a background in risk management or budget development? it asks. Are you a philanthropist or hang out with “high-net-worth individuals,” have contacts in local government, understand facilities financing. Are you conversant about education data use, know your way around technology, are a lawyer—and what kind? How many boards

who were working as education-policy consultants, set up shop on Irvin’s screened porch to mull the question. Eventually, they approached NewSchools Venture Fund with their idea to match charters with the kind of business professionals who might otherwise be outside their orbit, and then train them for charter-school boards’ special needs.

NewSchools was deeply invested in D.C. charters already, but was disappointed with their quality, and particularly with the weakness of their boards, Maura Marino, director of the fund’s D.C. program, told me. School governance “is what’s going to drive improvement over time,” she had concluded.

When I asked how, she rattled off a long list of “levers” that boards control: hiring the right school leader, providing him or her with professional development, aligning school resources to strategy—finding money for an enhanced reading program if teachers believe it will raise reading scores, for example. “Looking at academic data, asking questions, trying to be a good thought partner” with the school leader, she continued.

NewSchools eventually invested \$1.1 million in CBP, and the two groups now share office space near D.C.’s Dupont Circle. Among other funders, the Walton Family Foundation has since invested \$1.8 million, and D.C.’s Office of the State Superintendent of Education, which oversees the city’s education programs, put in \$500,000.

CBP started with three schools, offering recruiting and training services for free, then added another two schools, which it charged \$500 a year. It added individualized board coaching and raised the fee to \$10,000 a couple of years ago, and offered a \$15,000 “premium” service in 2014. That service includes access to CBP fellows, who are given time off by their employers from their corporate jobs to serve as part-time staffers to charter-school boards.

CBP has “walked away” from several troubled or uncooperative schools, including the D.C. girls’ school, Irvin says. But

charter-board chairs who have hired CBP have told me they appreciate its outsider’s fresh eye. Washington Latin’s Lerner says that he’s gone to CBP with concerns about board members who were “disengaged” or “didn’t understand their role.” CBP supplied training, but also “provided legitimacy to what I’m saying,” he adds.



Charter Board Partners looks for doers, not simply do-gooders.

have you served on, why do you want to serve on another board? Oh, and send a résumé.

Irvin and Lettre launched CBP, Irvin says, after a fellow guest she’d met at a Washington dinner party asked her how a public-school advocate like himself could find out about charter-school boards that could use his help. The two women,

The Capacity Challenge

Laws about who can sit on charter boards vary around the country, but D.C.'s law limits charter boards to 15 unpaid members, with two seats reserved for school parents; 51 percent of members must be D.C. residents. Charter management companies (CMOs) are required to have a local board in addition to their national board.

Don Soifer, a longtime member of D.C.'s charter-authorizing board, says parent members "help with the flow of critical information," getting word to the board about issues at the school before they begin to fester, and getting word to parents about board actions and concerns before they reach the rumor mill.

But Lerner frets that parent members can "stir up" other parents by sharing board discussions—real estate negotiations are particularly fraught, he says—and can be stirred up themselves by parent gripes and grumbles. "Some parents can't differentiate between governing a school and being on the PTA," he says.

The CMO board is a thornier issue. CMOs generally appoint school leaders themselves, which can leave their local boards with little leverage over the school head. "That's your one employee," says Lerner. "What's left?"

Likewise, large CMOs have their own real estate and finance operations that, for one reason or another, may bypass the local board. Rocketship Education discovered belatedly that the site it chose for a much-anticipated D.C. school is across the street from a halfway house. (Soifer says the local board was "not engaged.") Community opponents raised so many objections that Rocketship delayed opening the school until 2016.

At least initially, a CMO can also stack a local board with its choice of members—engaged or otherwise—so that local input is even further diminished. D.C.'s authorizer now asks, in a roundabout way, if a charter applicant can "fire" its CMO.

About 20 percent of a charter board's seats turn over every year, Lerner estimates, which means that D.C.'s charter schools need about 180 new board members each year. Even with its standing-room-only supply of policy wonks, foundation staff, think tankers, and corporate chiefs, that's

a lot. Those foundations and think tanks also have boards to fill and, let's face it, probably offer more glamour than an inner-city school.

"There's a danger of hitting a saturation point with the number of qualified and civic-minded people who can do that kind of work," says Soifer, who runs a think tank and is on charter school boards in four states in addition to sitting on the D.C. authorizing board.

Capacity can be an even bigger problem in cities where charters are still largely unknown and the talent pool is shallow or already tapped. "You have to think more creatively" to find board members, says Cornell-Feist. Working with hospitals, oil companies, and the Urban League, she says, she identified 240 potential board members in New Orleans after Hurricane Katrina largely wiped out the traditional school system there.

Rael Nelson James, who directs CBP's recruiting, told me she looks for board candidates within professional and education associations, on networking web sites, at meetings of grantmakers and development professionals, and among people she met in her years of community work. Charters come to her with specific needs: someone with budget-oversight experience, someone with a fundraising background. A STEM school recently asked for a candidate from the health-sciences industry.

James invites applicants to an interview where, she says, she'll "suss out" their education philosophy: "I don't want a board that doesn't believe every kid can achieve." She turns down candidates she thinks are

too young, too new to their careers, or too opinionated.

Then she'll send a "match memo" describing the candidate to the school's board, and a PowerPoint describing the school and its board to the candidate. After that, it's up to the board chair and the candidate to meet. "We're matchmakers; we don't go on the date with you," James says.

Debra Drumheller, a retired Exxon Mobil Corporation treasurer, told me she turned down the first school CBP proposed because it wanted help with budgeting and financial planning rather than oversight, and "it was more than I was willing to take on."



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She accepted CBP's second match, with a four-campus middle- and high-school charter, where she'll sit on the finance committee. When I asked Drumheller why she applied to CBP—was she a charter advocate, frustrated with traditional schools or what?—she seemed philosophically neutral. “I believe in competition,” she said, and charters wouldn't be flourishing in D.C. if there weren't a need for them.

Robert Cullen, a retired journalist-turned-public-school-English-teacher who was awaiting board placement, also sounded conflicted when I asked. “I always had reservations about charters and still do,” he said. But “my basic concern is helping kids get a good education, and if charters are doing that, then I'm going to support charter schools.”

Linking Governance and Achievement

On one of my visits to CBP's offices, Lettre and a group of staffers were reviewing a 22-page lesson—they called it a “tool”—designed to help schools develop a constantly updated report that charts students' academic progress. Board members could turn to the report—a “dashboard” in education parlance—to see if the school is on track to meet its academic goals.

The staffers agreed that a dashboard showing how many students, by grade, have mastered four or five separate math skills is too much information for the full board. On what might be enough, they agreed: a red hexagon to indicate that the school isn't on track to meet its math goals, a green diamond to show that it is. The board's academic committee might get a more detailed report.

In addition to recruiting and coaching boards, CBP provides its subscribers with professional development through a library of online training tools. There's another 22-page tool on how to evaluate a school leader. It includes a month-by-month evaluation time line (June: establish the leader's goals and professional-development plans for the year), sample evaluation forms, and practical tips, like how much time to devote to the chore (four hours a year per board member).

The fundraising tool urges board members to develop

a “stakeholder story” that describes the school through the experiences of one student, and outlines the disparate fundraising roles of the development staff, the school leader, and the board. There also are tools for setting annual goals, planning for the school leader's succession, and helping new board members settle in.

But the academic-dashboard tool takes on what surely must be the most important aspect of board membership: student achievement. After all, a charter board's purpose is to build a school that provides kids with a good education. So I wondered if there's a relationship between good governance and student achievement.

So far, there's no evidence—but also no research—to prove that there is. Soifer sees plenty of correlation: “The strongest schools generally have the strongest governance,” he says. But any “cause and effect is unclear,” he adds. Marino likewise told me that any connection “is distant, if there is one.”

Lettre says she and Irvin initially thought they'd begin seeing their work have an impact on children's learning within three years. By then, CBP's recruiting and coaching would have boosted board effectiveness. Following that, tools like the academic dashboard would prompt boards to start “asking questions of the school leader in a way that impacts outcomes for students.”

That time line may be too ambitious, she now says. And CBP hasn't yet figured out how to measure its impact—how to calculate the board's role, separate from the teachers' or school leader's, when reading scores rise. It's looking for outside help.

Even so, defining standards for effective governance and trying to measure them is “the first effort of its

kind, even if it's not perfect,” Marino told me. “It's hard to distinguish the best board from just a strong board,” she added, “but you can tell a weak board.” And that's usually by the school it leads.

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