Chartering 2.0 Leadership Summit

Proceedings Document

August 7-9, 2005
Mackinac Island, MI

National Alliance for Public Charter Schools

January 2006

Dear Friends:

Last summer, the National Alliance for Public Charter Schools gathered some of the nation's leading charter school advocates and other education experts to plan for the next generation of charter schooling.

The event, "CHARTERING 2.0," was inspiring and thought-provoking and provided valuable guidance on how to improve charter quality as the movement grows to scale.

This proceedings document captures both the content and tone of these important conversations, revealing the charter community's greatest strengths. Summit participants were singularly focused on bringing about improved educational opportunities for America's children. Accordingly, no punches were pulled whether discussing performance, public policies, or politics.

Comments are frank and, at times, politically incorrect. But given our shared goals and the importance of our mission, we should want it no other way. It was exhilarating to see the unflinching manner in which charter supporters faced up to and discussed evidence and experience. Thousands of young lives will be better because of this commitment and candor.

This document was designed to be an engaging, readable digest of the summit's presentations and breakout sessions. It includes the central points made by each presenter as well as condensed versions of particularly germane or provocative questions and comments from members of the audience. We've also highlighted a few quotes that illustrate the freewheeling flavor of the dialogue. These alone provide a sense of the depth and shape of the discussions.

Finally, several short readings were distributed in advance to help frame the summit's discussions. You can find these at www.publiccharters.org/summit.asp.

For those of you who were able to join us on Mackinac Island, we thank you for your valuable contributions to this important event. And to everyone who cares about improving public education in this country, we hope these proceedings provide plenty of fuel for thought and action.

Nelson Smith
President

Table of Contents

Welcome and Introduction

The Board Chair of the National Alliance for Public Charter Schools, Howard Fuller, kicked off the summit with a discussion of the purposes guiding the charter school movement.

Speaker:
Howard Fuller, Board Chair, National Alliance for Public Charter Schools

Tribute to John Walton

I want to begin by noting the tragic passing of John Walton. We in this room and tens of thousands of students and families across the nation owe him a debt of gratitude for his tireless work. He was a board member and an activist for many organizations, and while he is irreplaceable, the rest of us can honor his memory by working harder for our kids.

Our Children Are Running…

The *World is Flat* by Tom Friedman, includes an African proverb: every morning in Africa a gazelle gets up and knows that if it can't run faster than the fastest lion, it will die; the lion knows that if it isn't faster than the slowest gazelle it will starve. Either way, when the sun rises in Africa, both start running.

Every morning, kids across the globe wake up and run; the question is, "will our kids be able to run as fast as kids elsewhere?" While we have some children that run fast, low-income children and children of color aren't keeping up. That's because some adults have failed them.

Practice of Freedom

But running fast is more than getting a job; we should prepare our children to engage in the "Practice of Freedom." Children need to be socially aware—show care for the elderly and the poor. We need to create environments of learning for these children. Our movement has to be about preparing kids to be productive economically and socially.

"We shouldn't support charter schools for their own sake, but for what they are able to do. If chartering isn't working for our kids twenty years from now, we need to get rid of it."
– Howard Fuller

Chartering as a Vehicle

Our work isn't just about charter schools. Chartering is a vehicle; we should be committed to purpose. We should never commit to a method. We shouldn't support charter schools for their own sake but for what they are able to do. If chartering isn't working for our kids 20 years from now, we need to get rid of it. Don't protect the thing but the reason for the thing.

On Making Excuses

Too many charter supporters have been making excuses, talking about "dysfunctional families" and "kids with problems." But we knew that; that's why we started the movement. There is no whining in this movement. We said we could do better. We have to do whatever it takes to educate these kids.

Others among us are complaining about unions and the *New York Times*. But, as Sy Fliegel has said, we picked this fight. Our opponents are supposed to hit us back. They're worried; that's why they're fighting. There is no room for you if you are scared. We have to gear ourselves up to fight.

Future Leaders

We need more young people in positions of leadership in the charter movement. We also need more Blacks and Latinos. You can't have a movement about a people's liberation and not have them involved in it.

Why We're Here

The President of the National Alliance for Public Charter Schools, Nelson Smith, framed the issues to be discussed and outlined the summit's goals.

Speaker:
Nelson Smith, President, National Alliance for Public Charter Schools

Why Now?

Chartering is at a crossroads. This innovation, this idea, now has 1,000,000 kids in more than 3,400 schools in 40 states and Washington, DC; it is working so well in so many places. But we have become a target. While the research tells us that achievement in charters is good and getting better, some charters—even after all the caveats—are not doing well enough.

The Model

Our model is brilliant and serves kids well. It has power and has proven successful over and over again. But if we are to grow and serve more kids, we have to face our problems head-on. We have to determine which habits, beliefs, and school practices need to change in order to make this model work even better.

Reaching Opponents

Many people have a stake in the status quo; others just haven't thought about what education might look like aside from its current arrangements. We need to break through and make a convincing case that we can do this well and do it at scale.

The Three Tiers

The original model can be thought of as three tiers. Great schools get to grow and replicate to serve more children. Schools in the middle can improve because there is regular monitoring of their quality and intense feedback on their operations, and they have the flexibility to change and improve.

"Our model is brilliant and serves kids well. It has power and has proven successful over and over again."
– Nelson Smith

The second year report of the Caesar Chavez Public Charter High Schools in Washington, D.C. is illustrative. The first year was tough, and they took feedback from their authorizer, board meetings, teachers, and others and then came to terms with their shortcomings. Because of their autonomy and commitment, they changed for the better, and today this school is among the best in the city. That's what we can do and the "ocean liners" of public education—traditional school systems—find it so hard to do.

Finally…schools at the bottom: If you've had five years, and we've used value-added measurements and given you the opportunity to improve, and you still aren't serving kids well, then you have to close. There is no shame in this, but we have to realize that not all charters will be superior. Unfortunately, as a movement, we aren't yet to the point where a school's failure to achieve academic goals routinely leads to closure. And we haven't made the case that closing struggling schools is a positive step—that it will open new doors to underserved children.

This is What It's All About: Charter Alumni

Charter schooling's long-term impact on young lives is no longer a matter of speculation. Thousands of students have already graduated from charters and begun their lives as adults. Four alumni explained what their charter schools have meant to them.

Speaker:
Jesse Lopez, Alumni, Preuss Charter School

I'm from a small town in southern California, between San Diego and Tijuana, Mexico. I attended the Preuss School on the campus of the University of California, San Diego (UCSD). It is a college preparatory program for would-be first generation college students. I was part of the first graduating class, and 90 percent of students got into four-year college programs. Today, I'm a rising sophomore at MIT.

"I had the opportunity to take classes with other Latinos and African Americans who were committed to succeeding in life." – Jesse Lopez

UCSD professors helped us in classes and acted as mentors. One of the biggest benefits of the school for me was that I had the opportunity to take classes with other Latinos and African Americans who were committed to succeeding in life. They were good classmates and role models and helped me build my confidence.

Before Preuss, I used to get in trouble and didn't care about school. My parents didn't graduate from high school and so they weren't confident about helping me with my schoolwork or coming into my neighborhood school. At Preuss, every Friday all the parents were invited in, and this encouraged my family to become more involved. The school was inspiring and gave more purpose to my life. Many of my neighborhood friends dropped out of school and others joined gangs. I wouldn't be where I am today if it weren't for this charter school.

Speaker:
Samantha Simpore, Alumni, Maya Angelou Public Charter School

I attended Maya Angelou in Washington, D.C., a school for children in the juvenile justice system. Traditional public schools kicked me out and wouldn't let me back in. Maya Angelou gave me an opportunity—they said this was my last chance. If I gave 100 percent to them, they would give 110 percent to me.

Thank you to everyone here for supporting charter schools. Charter schooling enables schools like Maya Angelou to happen. Today, I'm in college and working at St. Coletta's, a school for mentally challenged and autistic children.

Howard Fuller said that the movement needs more young leaders. I'm willing to be one of those young leaders. Charters can help more students, and I'm willing to spread the word.

Speaker:
Justin Lefevre, Alumni, Concord Academy

"Today, I'm ready for anything that life has to throw at me."
– Justin Lefevre

I went to Concord Academy, a K-12 charter school in Michigan, one of the first in the state. Now I'm a student at the University of Michigan. Concord has a rigorous program that utilizes the fine arts throughout the curriculum. Students are required to take classes in dance, choir, and theatre.

Because they helped start the school and were involved in all of its activities, families and teachers felt like they were owners of the school and cared deeply about it. It was like a second home. It prepared me extremely well for the demands of college. I'm ready for anything that life has to throw at me.

Speaker:
Richard Brown, Alumni, Ridge View Academy

I was a student in the Rites of Passage program at Ridge View Academy in Watkins, Colorado. The school educates students who are in the state's juvenile justice system. It was my last opportunity. Getting used to it was very hard. Orientation was like boot camp. You don't just sleep until noon and talk in class.

The school created a positive peer culture—kids hold each other accountable. The school gave me a new opportunity to succeed in life. I had been getting in trouble in and out of school for years, and the school showed me how to understand my own anger and actions. It taught me important life skills. It prepared me to succeed in college and beyond.

At the end of my first year at Ridge View, I saw a student receive the school's highest award and give the graduation speech for epitomizing the school's principles of excellence inside and outside of the classroom. I wanted to win that award so my mom could see me give the speech, so I committed to it but didn't tell anyone that this was my goal. At graduation, I won the award and was so proud. Today, I'm a student at the University of Colorado, Colorado Springs.

1991 and 2005: Goals Then and Now

Parental choice, competition, social justice—for more than a decade, people have been embracing charter schools for a multitude of reasons. But are the aspirations of today's leaders significantly different from the goals of those who started the movement? Before we started planning for the next generation of charter schooling, we asked a few charter pioneers to discuss why they started this movement and a few new leaders why they've picked up the torch.

Speaker:
Ember Reichgott Junge, Former MN Legislator, Author of First Charter Law

Charter schools were born in 1988 on a napkin in northern Minnesota. Minnesota had already experimented with public school choice through open enrollment and post-secondary access. These were good steps, but while we now had more access to choices, there weren't many different choices to access. It's critical that you have different types of programs from which to choose.

For me as a legislator, this was about creating more opportunities for kids and letting parents and teachers take the lead. Policymakers don't have a monopoly on good ideas. I also saw that many teachers were frustrated with their work environments and were leaving the profession. I wanted to give them more ownership. I wanted to give them the freedom to be better.

Others in that original brainstorming group had different goals. Ted Kolderie wanted to create a dynamic new sector within public education that empowered forces other than local districts. These groups would develop new programs, which would put pressure on the current system. Joe Nathan wanted alternative learning programs for children.

"For me, as a legislator, this was about creating more opportunities for kids and letting parents and teachers take the lead."
– Ember Reichgott Junge

Charters were not a partisan issue. They were not an indictment of public schools; they were to help educators do a better job. They were about stimulus, not competition. They were not about vouchers; they were about public education. The law said nothing about conversions, nothing about start-up funds or facilities aid, nothing about the achievement gap, or low-performing schools. It was about options for all children.

My biggest regret was that we didn't spend enough time thinking about sponsors and the training and expertise they need.

Speaker:
Larry Patrick, Former President, Detroit Board of Education

"If you empower educators to start schools, you will get a diverse supply, and then parents will choose which program best fits their child's need."
– Larry Patrick

I was a very active parent in Detroit. The traditional public school our children attended was very good. It had a waiting list of 2,000. We thought, "Why don't we create more schools like this?"

I was elected to the Detroit school board in 1988 on a platform of diversity, empowerment, and choice. If you empower educators to start schools, you will get a diverse supply, and then parents will choose which program best fits their child's need.

In February 1991, the Detroit board agreed to charter new schools. We reached this agreement after long negotiations with the school superintendent and unions. There were problems, though, in the implementation, and by 1995, we only had 10 charters operating.

Speaker:
Yvonne Chan, Principal of The Nation's First Conversion Charter School

California copied Minnesota's law in 1993 but added the conversion option to it. I had been in the school system for 20 years and was frustrated with the bureaucracy. That same year, teachers had to take a 10 percent pay cut. Parents were deeply concerned about the safety of their children when they went to school.

The system saw that many urban schools were struggling, and they gave us two unattractive options: first, school based management, which would give us discretion over only $50,000 for 2,000 students, allowing us to buy supplies on our own; or, second, go to "LEARN," a program to help schools improve. LEARN looked somewhat promising but had so many requirements it would turn you blue. We said, "Forget it! We're going to convert into a charter school."

Our school has gone through several five-year cycles:

Cycle 1 — Beginning in 1993, we constantly battled with the system, trying to stay open. Our goal for students was to get them to proficiency on basic skills.

Cycle 2 — Beginning in 1998, we went to full services for students and the community. We adopted performance pay for our teachers.

Cycle 3 — In 2003, we expanded from K-5, to preK-12. We are now on four campuses and have an international studies program for 9th graders.

Our next cycle must be about getting alternative authorizers; building human capital (recruiting experienced administrators); securing better financing on operations and facilities; and building political clout for the movement.

Speaker:
Tom Torkelson, Founder and Head of Schools, IDEA Academy

I entered Teach for America out of college in 1997 and moved to rural southern Texas, to a town called Donna. English was not the first language for almost all of our students.

We wanted to prepare our students for success on the state's basic skills tests and so we decided the best way to do this was to start with students as young as possible. We looked at other top-tier schools in the state for lessons and then launched the IDEA Academy. At first, we were a school within a school of 100 students. The next year, we got a charter and moved out. Now, after five years, we have 1,000 kids—500 in primary and 500 in secondary.

"The ultimate mission is to replicate with quality."
– Tom Torkelson

Our goal was to reduce the achievement gap in our school, but we also wanted to help as many kids as possible. We quickly realized that we could get leverage in our town by enrolling lots of students. Since we were a small town, 1,000 students represents a huge chunk of the population, and district schools changed their operations to stop losing kids to us.

In Texas, some charters are great, but some are lousy. When we went to the legislature asking for more aid and for facilities, legislators invariably would tell us that charter quality is suspect so they simply couldn't pump in more money. We agreed to an exchange: more money for high-quality charters, particularly serving low-income kids. This was palatable to the public and encouraged mediocre schools to improve.

We also decided that we needed to expand. KIPP, Achievement First, Aspire, and other Charter Management Organizations are scaling up, but they're all doing it in urban areas. No one was scaling up for needy kids in rural areas. So next year, we are launching four new schools—in five years, 4,000 students will be in IDEA schools. Then we can leverage change not just in our town but also along the border and throughout the entire state. So the ultimate mission is to replicate with quality.

Speaker:
John Petry, Partner, Gotham Capital

I'm not an educator; I'm an investment manager. I'm helping start a school in Harlem that will open in 2006. Through this work in New York, it became clear that too many Democrats are opposed to charters. In general, Democratic politicians are a major obstacle to expanding charter schooling in New York. Particularly difficult is their opposition to raising the statewide cap. The shame is that so many of our charter schools are in heavily Democratic areas and these elected officials represent the families who would most benefit from additional charter schools.

So I'm working with a group to start an organization called "Democrats for Education Reform." It will include national Democratic office holders, major contributors to the party, and other activists. Our goal will be to change the minds of opponents within the party so that meaningful reforms can be embraced.

Speaker:
Joe Viteritti, Professor, Hunter College, CUNY

My assignment is to put all of this in an historical context. The best place to start is Minnesota since it had the first law, but looking at laws is problematic because laws are compromises and don't entirely reflect aspirations. Minnesota was a progressive state and already had choice programs and other innovations. So, politically, charter schooling was less contentious; and in terms of policy, it wasn't as unusual as it might have been elsewhere.

When the idea of choice, and later charter schools, came to New York, however, it was a different story. People were suspicious from the very beginning because it was so novel. Then the conservative think-tank, the Manhattan Institute, embraced it. It immediately became a threat, and many powerful forces circled their wagons in opposition.

"Charters are just part of a larger struggle. They are a means to a greater end: creating new life chances for underserved students."
– Joe Viteritti

The idea of markets became an inseparable part of the discussion. Some thought that alternatives would help both the kids who choose and, because of competition, those who don't. Others countered that some kids would be left behind. Reasonable questions arose about the number and quality of alternatives that would be created.

It's important to keep in mind that there are always new education reforms popping up. Chartering has come very far in a short time. Few reforms take hold like this. This is something to be proud of and encouraged by.

The term "movement" suggests politics, and a part of the movement's message is opportunity and equality. Chartering is a tool to promote opportunity and help the disadvantaged. Judge your bedfellows by their interest in helping kids and realize that charters are just part of a larger struggle. They are a means to a greater end—creating new life chances for underserved students. Opportunity should define us and those we call our friends.

Questions and Comments

***Eric Rofes**, associate professor, Humboldt State University:*
My research and experience indicates that liberal leaders of color are more willing to support charters than White liberals, who have a tendency to hold a favorable view of unions and traditional means of improving public schools.

Ember Reichgott Junge:
This is interesting, because the original charter legislation was written by White suburban women in Minnesota! The opposition from the left in the current debate is a result of better messaging by those on the other side.

Three Big Assumptions: Zones of Wishful Thinking

The charter school model holds that the combination of new, autonomous, accountable schools and increased parental choice will lead to a public education system that has a wide diversity of high-quality options. But in between the theory and practice are several assumptions about how competition, incentives, politics, and other forces work. How these assumptions play out in the real world has important implications for the future success of charter schools.

These assumptions were investigated during this segment of the summit. The discussion was started by Paul Hill, who has written about the existence and complications of such assumptions in other education reforms.

Speaker:
Paul Hill, Professor and Director, Center for Reinventing Public Education

It's important with all school reform initiatives to identify what the backers of each assume. These assumptions may or may not work out as expected. For example, many of us in the charter world thought there would be a huge supply of high quality people ready to start schools and that those schools would be innovative and significantly different from what was already available. That wasn't entirely the case.

We also thought school districts would be both threatened and inspired by charters. But it turns out that not all charters were as strong as they might have been, and districts were much more insulated than we thought, largely because strong barriers to imitation exist.

School Districts Will Change in Response to Charters

One assumption was that charters, through competition, would cause traditional schools and districts to change their practices and improve results. While there is evidence of change in some areas, improvement hasn't come as easily as originally thought. What does this mean for charter school policies and practices and the ability of traditional systems to change?

Speaker:
Jim Peyser, Partner, New Schools Venture Fund

I've found that it is helpful to think about where the pressure on districts is coming from (inside or outside) and the level of the district's receptiveness to change. For example, if outside forces push for charters and the district is at least somewhat responsive, then the district may adopt some new practices, such as small schools, certain pedagogical methods, and so on.

But if the district is not receptive, there will be competition between the charters and the district. This can have a whole range of possible outcomes.

If the district itself is developing charters (pressure coming from the inside), then change is even more likely, as in the case of New York City, where the Chancellor's office is actively pursuing a reform agenda that includes charters.

Speaker:
Deborah McGriff, Executive Vice President, Edison Schools

I've worked in several districts—New York City, Cambridge, Milwaukee, and Detroit — and all had different degrees of choice through a range of programs. Since I've been with Edison, I've worked in many other areas with different choice programs.

"Districts are used to change; they do it all the time. The question isn't if their practices change, it's whether their results change."
– Deborah McGriff

Many districts have responded to charters. For example, some have adopted longer days, some have increased their marketing budgets, and some have developed new programs. Some districts have given their high-performing schools more freedom, thereby incentivizing them not to become charters. It has also forced districts to realize that all kids matter. Finally, it has made districts keep an eye on enrollment.

We shouldn't be surprised by this. Districts are used to change; they do it all the time. The question isn't whether their practices change, it's whether their results change. There is a big difference. We need to spend more time asking about academic achievement.

Finally, we need to start thinking about how we move from suspicion and competition to collaboration and cooperation with districts.

Speaker:
Macke Raymond, Director, Center for Research on Education Outcomes

I have three points. First, change is the last thing districts will do. Second, there are predictable indicators of where districts are on the change curve. Third, the charter movement isn't yet making a strong case for competitive response from districts.

I study the emergence of markets in industries dominated by monopolies. Certain lessons can be learned from these instances that can be applied to the charter world. Monopolies have enormous power and do not change happily or easily; they can expend resources to avoid change. When threatened, they launch a series of wars. First is the war of entry: prohibiting new entrants into the market. They try to set high barriers through law and regulation. In general, the monopolist is dismissive of potential entrants.

The second war is of survival—they launch games of irritation. These include delaying tactics, non-responsiveness, and nonpayment. They try to limit the discretion of the new entrants. The public relations strategy is to smear the new opponents, often personally.

"Change is the last thing districts will do…(but) there are predictable indicators of where districts are on the change curve."
– Macke Raymond

Third is the war of containment. They will heap on as many costs as possible to wear you down, such as more reporting requirements and cost studies. The public relations battle becomes more aggressive and organized.

Fourth is the war of elimination; the biggest indicator is the legal challenge. The opposition forms into coalitions designed to destroy the new entrants.

After all of these wars, you will see change. But you have to survive first.

A final point: if chartering is to win the political and policy battle, it must demonstrate that it can either produce much better results or much greater efficiency (same results with lower costs). Charter schools haven't done either yet.

Speaker:
Tom Hutton, Staff Attorney, National School Boards Association

I am a lawyer with the National School Boards Association and a former board member of the Thurgood Marshall charter school in Washington, DC. So I come at this issue from both sides. Generally, I believe that districts and charters will benefit by building more collaborative relationships.

This movement should bear in mind the negative things people in public education hear about charters: charters are being shoved down our throats; charters are out-performed by traditional schools; charters don't serve a more disadvantaged population; charters generate lots of scandals; charters inevitably leave district kids behind; charters aren't scalable.

"Charter advocates should keep in mind that if certain freedoms are good for charters they should be good for all schools."
– Tom Hutton

The "us vs. them" competitive paradigm leads us to miss some opportunities for collaboration. There are areas of federal law where there are common interests. Also, charter advocates should keep in mind that if certain freedoms are good for charters they should be good for all schools.

Speaker:
Ted Kolderie, Senior Associate, Education|Evolving

It can't be held against chartered schools if district schools don't change: only districts can change district schools. Some districts will make modest changes and improvements. But these organizations, like other long-established organizations, find it nearly impossible to change in really significant ways. So an aggressive effort at new school-creation is essential. This country will not get the schools it needs by changing the schools it has.

Chartering is justified by its superior capacity to generate schools that are significantly different from the traditional model. Three kinds of differences are especially important. First, schools that begin with the individual student's needs and interests. Customization is a powerful trend in most large enterprises, and education should move with this trend. Customized schools will have better potential to educate the (perhaps) half of all students underperforming in conventional district schools.

An aggressive effort at new school-creation is essential. This country will not get the schools it needs by changing the schools it has."
– Ted Kolderie

Second, schools that provide real professional opportunities for teachers. Third, schools that—because they create new roles for students and for teachers and because they make much greater use of information technology–will be more sustainable economically.

Not all the schools chartered will be innovative schools, or even quality schools. The schools will differ widely: A chartered school is not a kind of school. Chartering is simply a process for creating a school. But some schools will be innovative and will work well. Research and evaluation must do a better job of

identifying and describing these schools where they appear. The sector will scale up as we move aggressively to replicate these new quality models.

Questions and Comments

***Joe Nathan**, director, Center for School Change*:
There are plenty of examples of districts responding well to charters. Why the singular focus on the wars?

Raymond:
I don't disagree. But all monopolies have tendencies. These tendencies bear themselves out in education as well. We have to be prepared for these and their consequences.

McGriff:
Yes, some districts are changing, but change itself is not enough. We want better results from districts.

Choice Will Drive Achievement and Innovation

Another assumption was that by giving parents the power to choose which school best fits their child's needs, schools would develop new programs and improve quality in order to attract more families. But the charter sector hasn't become as diverse as some expected; "innovative" has proven difficult to define; and some parents have choosen to send their children to underperforming schools.

Speaker:
Bob Maranto, Assistant Professor, Villanova University

Charters' impact on districts is largely a function of school finance rules. My research shows that a district is more likely to change its operations in response to charters when the district receives most of its funding from the state. This is because these districts lose funds—and therefore feel the pinch of competition—when parents choose to send their kids to charters because state dollars will follow the child. Districts that rely mostly on local funds, however, are less

likely to change because local dollars don't follow the child to a charter school. So these districts can lose students and not feel the financial pinch.

Speaker:
Lawrence Patrick III, President, Black Alliance for Educational Options

People have many reasons for choosing what car they drive. Lexus is the best-built car in the world, but not every person of means chooses to drive a Lexus. It's not just about quality. For example, my siblings drive Grand Cherokees; they do so because the plant is right down the street. They understand the relationship between buying a car and someone else's livelihood.

"Lexus is the best-built car in the world, but not every person of means chooses to drive a Lexus."
– Lawrence Patrick III

Yes, quality is important, but we need to stop thinking that we only need to consider quality. Parents have other things on their minds: safety, location, friends, programs, and facilities.

This doesn't mean that academic quality doesn't matter, but if we want parents to base their decisions on that more than other considerations, we need to put more information in their hands.

I want to give props to this organization for using the 1.0 - 2.0 concept. It's important to think in terms of progress and new models. But we shouldn't just talk about 2.0. Software companies are always working on versions that are still years and years away. So let's have a group working on 2.0 and 3.0 and 4.0.

Speaker:
Andy Rotherham, Co-founder and Co-director, Education Sector

Markets don't work in education as they do elsewhere. Parents' choices are based on countless variables. This is not a "build-a-better-mousetrap" industry; unfortunately, people will attack your mousetrap even if it's great or say, "Mice aren't really a problem."

"Consumer tastes are still developing in K-12 education."
– Andy Rotherham

In education, competition just doesn't work as you might expect. It's a political, not economic, logic that governs education. Traditional public schools have huge legislative power, and they're also willing to go to the courts. That is, they don't compete first but rather last because there are so many other avenues available to them to respond to competitive threats first. In addition, many districts are simply unable to compete because they are broken. Often, they aren't able to do what they want or need to do.

Finally, parents are not accustomed to choice yet. To use another industry as an example, 30 years ago only the wealthy had designer coffees and cappuccino makers. Eventually, Starbucks comes along and introduces everyone to fancy coffee. Now we all drink it, and people's tastes have changed. Over time, the coffee industry changed and people got accustomed to choosing and then developed more sophisticated preferences. Consumer tastes are still developing in K-12 education, Folgers is still the dominant brand.

Speaker:
Reed Hastings, Founder and CEO, Netflix

It took 100 years for John Locke's theories of democracy and personal rights to be implemented into government practice in America. When finally implemented, only land owning White males could vote. It took another 50 years of struggle before Andrew Jackson secured the right of non-land owning White males to vote. It took until 1863 for Black males in rebel states to get the right to vote. It was another 50 years before women got the right to vote and then another 50 years before the Voting Rights Act ensured that Blacks could vote in practice. All in all, it took 350 years for this idea to be fully realized.

"We should stop being so down on the progress of the charter movement — we've only had 15 years."
– Reed Hastings

We should stop being so down on the progress of the charter movement — we've only had 15 years.

The idea of democratic control of schools through local boards of education has a lot of natural appeal and a lot of history. Our ideas are new and relatively unusual. They'll take time to grow roots.

Does choice drive innovation? Not really, at least not directly. Choice leads to deregulation, and that leads to innovation. Regulation kills innovation and institutionalizes mediocrity. We can't expect our schools to cause the districts to improve because those schools are still regulated.

Some states are still in Chartering 1.0; other states are more mature. For the "1.0" states, you must grow. Get as many schools as possible, and don't worry about quality right now. You can clean it up later. I believe in the one percent rule: you are still in Chartering 1.0 until you get at least one percent of the market. You'll need to hit that mark before you're able to protect yourselves and get adequate resources and interest from funders, parents, the public, and legislatures.

Questions and Comments

***Josephine Baker**, executive director, D.C. Public Charter School Board*:
I have to take issue with the contention that we should just focus on growth and not quality. Politically, that would be dangerous for the movement.

Hastings:
I'm only advocating a swift, growth-first posture in states where charters have less than one percent of the market. You must reach that threshold before you can make the leap to all of the good things that happen in a district or state in

Chartering 2.0. Having said that, states must play a bigger role in closing low-quality charters; they ought to play the same role on quality as the FAA plays on safety; that is, make it a non-issue so participants compete on other dimensions. Parents should choose schools based on class size, length of day, curriculum, and so on, knowing that all of their options are educationally sound.

Rotherham:
I still disagree strongly with the focus on quantity instead of quality. First, these are kids, not CDs or coffee beans. We can't knowingly start schools that are of suspect quality even in the service of some larger goal that would help kids. Second, politically, lousy charters will be hung around the necks of all other charters.

Hastings:
As a general rule, I'm in favor of being lenient on the front end and tight on the back. I'd allow more charters to get started than many of my colleagues. Keep in mind that Fred Smith's plan for Fed Ex got a "B" from a professor who said that in order to get an "A" the plan had to have a reasonable chance of success in the real world. The point is we don't know who is going to do well at starting schools. We should clean up our mistakes through a tough renewal process.

The More the Merrier

Many advocates believed that a strong, straightforward charter growth strategy would yield high quality schools and a distribution that met the demands of all interested parents. While growth has been robust, charter schools are unevenly distributed among states and cities, and their quality varies. Is it time to become more strategic about the type, number, and location of new charter schools?

Speaker:
Joe Nathan, Director, Center for School Change

Our movement has done a horrendous job so far in communicating with the public, policymakers, and the media. That's our biggest weakness, and we will have much less growth, and less positive impact on students, until we become much better at communicating with the general public and policymakers.

I don't want to see another lousy school, whether it's traditional or chartered. Together we need to do a better job of training charter founders so there is less variability in quality after they open. In Minnesota we've gotten better at that, but it has taken time.

Speaker:
Bob Bellafiore, Partner, Eric Mower and Associates

This movement needs to get stronger and that will only happen by getting bigger, better, and broader. This is the only strategy that will keep the entrenched interests from warring with us without fear. We need to improve our ability to find positive stories and tell them.

We also need to improve our quality. We can't be just as good, because then there's no need for charters. "Just as good" is not enough to convince elected officials to change the system of education.

"We need to be in the urban and rural areas, but we also must expand into the suburbs."
– Bob Bellafiore

We also need to get broader. Yes, we need to be in the urban and rural areas, but we also must expand into the suburbs if we want all segments of the political structure to care about us and listen to our concerns. That's where the votes are.

Just as Jackie Robinson was the perfect guy in character and temperament to break the color barrier—and he was chosen after careful study by Branch Rickey—we need to find the perfect model to work in the suburbs.

Speaker:
Anita Nelam, Founder and President, Harte Crossroads Public Schools

In general, I'm not in favor of charter caps, but I've decided to support the cap in Ohio. It will give us an opportunity to fix what needs fixing, because we do have some issues to resolve. I look at this as the pause that refreshes.

There are too many low-performing schools in Ohio, and we need to take care of our own industry before we advocate for growth. Justice isn't just about creating new schools; it's about creating high-performing schools—schools that are better than those we already have. I believe firmly that if you can't run a high-performing school, you ought to get out of the business.

"Justice isn't just about creating new schools; it's about creating high-performing schools."
– Anita Nelam

Speaker:
Don Fisher, Founder and Chairman, GAP

If we're to grow, we need stronger support organizations. That's why we're funding this national organization and California's charter school organization.

We need better state laws. Only about five or ten state laws are worthwhile; the rest are very restrictive.

We need better publicity. The public hears too much of the bad and not enough of the good. Everyone should know that charter schools are public schools.

We must understand that some people are going to be against us and use the media against us. We can't complain about that—we need to prepare.

Finally, we also need to have more CMOs, so good models can expand. Organizations like the new Charter School Venture Fund will encourage bringing success to scale.

Race and Class in the Charter Movement

Speaker:
Howard Fuller, Board Chair, National Alliance for Public Charter Schools

Race is a difficult issue to talk about…maybe the most difficult issue to talk about. We don't want the Black people to stand up and be angry and the White people to get defensive. But we have to be committed to talking about it anyway. It's that important to this movement.

Charter schooling is about education, choice, and liberation. It's a social movement.

I say it at all of these meetings, and I'll say it again here: This room is too White. We need more Black people in the room and we need more Latino people in the room. People have to take part in their own liberation.

A part of the problem is that when you start by inviting the current leadership of the movement—state associations, resource centers, foundations—you're going to get a White crowd. These organizations are not diverse enough. When we talk about the leadership pipeline, it has to be about not just schools but all of our organizations.

"People have to take part in their own liberation."
– Howard Fuller

Another issue we have to understand and deal with is that there are a lot of low-performing charter schools being run by people of color. They typically have fewer resources and fewer networks to call on. I'm not going to defend any school that's not educating children. But when you try to close those schools, race is going to be part of the equation, and we have to be prepared for that and be sensitive to that.

Finally, the next time we do this meeting, we need to invite some low-income parents. That's the audience we're trying to serve; we have to stop just talking to one another about what someone else needs.

Speaker:
Mike Feinberg, Co-Founder, KIPP

When we started KIPP and knocked on doors in low-income areas, there was a lot of cynicism from parents. They were wary of us. They were wary of our pitch.

First, we tried to convince them that we were committed to getting their children into college. But really we first had to convince them that we cared about them and their kids.

We learned quickly that we had to deliver on our promises of safety and excellence. Our goals had to be clear. It didn't take too much time though before

the cynicism turned into excitement. These parents cared about the education of their children; we just had to get over some early hurdles.

At KIPP, we're working on two important things in this area. First, we have to do a better job of recruiting and training a more diverse teacher and leadership corps. Our kids need to see leaders that look like them.

Second, we need to get KIPPsters to come back into the movement. When they're out of college or during the summers, we want them to help at the foundation and in schools. We need them to give back and reinvest in the next generation of KIPPsters.

Speaker:
Tom Espinoza, President and CEO, Raza Development Fund

I agree with Howard that this room needs to be more diverse. I think 50 – 60 percent of our members need to be people of color. That's the way to make sure this lasts and people of color believe in it.

We also have to make sure that charter school leaders understand how important family, community, and faith are to the Latino community.

Finally, we have to do more to spread the charter school message to recent immigrants. They lack the language skills that many of us take for granted, and they have fewer social networks. We need to double our efforts to disseminate information to them. These families need quality schools and environments that are committed to their children.

Questions and Comments

Allison Harmon, *Skillman Foundation:*
The economic resources needed to start and build schools aren't there for people of color. They can't call on wealthy contributors and banks as easily. KIPP wouldn't have gotten off the ground had it been started by two Black men. They wouldn't have had access to the money needed.

George Fatheree, *California Charter Schools Association*:
There are so many issues to deal with in charter schooling — facilities, laws, teachers, and so on. How high should diversity be on our list of priorities?

***Fuller**:*
I think it needs to be 1b on our list. 1a has to be quality.

Macke Raymond:
The White people in this room aren't the ones that need to be lectured. We've committed ourselves to making education more just. This conversation needs to be happening with people outside of this room more than with people inside.

"If the charter movement is about social justice and opportunity for all disadvantaged people, a conversation about race alone isn't sufficient."
– Andy Smarick

***Uchenna Smith**, principal, KIPP Sankofa, Buffalo, NY:*
I'm so happy we've started this conversation, but we have to make sure we continue it. There isn't enough time to go into all of the issues. This has to be part of all of our meetings from now on.

***Andy Smarick**, National Alliance for Public Charter Schools:*
I want to interject the issue of income and class back into the discussion. The charter movement has done an excellent job of moving into urban areas. But not all low-income people are in urban areas. And these low-income students, many of whom are White, don't have access to charter schools. If the charter movement is about social justice and opportunity for all disadvantaged people, a conversation about race alone isn't sufficient.

Monday, August 8

The three following breakout sessions ran concurrently and were designed to tackle the movement's "dilemmas of scale," issues that are either standing in the way of the movement's expansion or emerging as the movement gains a larger share of the K-12 market.

Should We Feel Their Pain?

The growth of charter schooling causes financial headaches for various segments of the traditional system. To some, this is good—a discomfited district is more likely to change. But an angry district is also more likely to take its frustration out on charters. Even worse, it might be tempted to take actions that harm students in traditional schools and then blame charters.

Speaker:
Jonathan Gyurko, Special Assistance, United Federation of Teachers

If we are going to be concerned about "their pain," we've first got to define both "their" and "pain." A school district is not monolithic. It is composed of different groups of individuals, including students and families, teachers and principals, administrators and the superintendent, and the unions and school board. Each group may have different reactions, sometimes "painful," to the existence of charter schools in their district. Moreover, the reactions will be different if charter schools are perceived to be competing or complementing a district's work. Understanding each group's reaction, as well as how charter schools are presented and perceived, is essential if we are going to build a nuanced and enlightened strategy for the growth of the charter movement.

Speaker:
Bryan Hassel, Director, Public Impact

I think the primary "they" is the district, and the pain felt is financial. Districts argue that they aren't able to reduce costs as they lose students; they say they have fixed costs because of capital projects and contractual agreements.

There are some mitigating factors to this though. In most places, the charter market share is quite small, so financial pain is only real in a few places. In other districts with lots of charters, overall student populations are growing, so charters are actually helping ease crowding. Finally, most laws have mechanisms that protect districts from pain.

"There are times that we want (districts) to feel pain: pain is a component of one theory of change — it creates an incentive for districts to improve."
– Bryan Hassel

How do districts typically respond? They often play the "pain game." Districts will eliminate the most popular and painful things—such as teaching positions or valuable programs—instead of the least valuable. They also play up the human toll, saying they have to let teachers go. In fact, districts have to hire hundreds of teachers a year because of retirements and relocations. So a net loss in teachers actually means not hiring as many new people, not firing those already employed.

But there are places where pain is real, and there are times that we want them to feel that pain: pain is a component of one theory of change—it creates an incentive for districts to improve. There is also a moral claim: that money ought to follow the child to any public school of his or her choice. Finally, there is a practical reason: if you don't have money follow the child, you are double-funding the system.

There are also reasons to dislike pain. Some see charters as an R&D project for the traditional system, so these new schools shouldn't hurt the schools they were designed to help. Inflicting pain also undermines local relationships that could be helpful. Politically, pain could be unwise because it gives traction to opponents who argue against other pro-charter policy changes.

Speaker:
Eric Rofes, Associate Professor, Humboldt State University

Imagine if charters envisioned themselves as partners with districts. I've been chairing a task force made up of unions, superintendents, teachers, parents, and others designed to stop the collision course and figure out ways to work together.

First, we tried to find areas of tension—such as special education services, facilities, and transfers—and create mutually beneficial solutions. We have to remember that we're in this together and constructive relationships will do more than competition.

"Losing students to this new sector is a loss of stature. It causes embarrassment."
– Eric Rofes

Our report looks at issues in these areas: oversight/accountability, funding, governance, facilities, and compatibility.

Compatibility focuses on issues like teachers—the issues facing charter and district teachers are virtually identical. All deal with disadvantaged children, Adequate Yearly Progress (AYP), and so on.

Funding is interesting and difficult: we spent a lot of energy trying to build consensus on this issue. We agreed that funding should be equitable and that districts should be protected from a sudden, severe loss of students; that is, the legislature should mitigate sharp losses in students and funding.

There's another important type of pain that we need to be aware of: charters lead to a symbolic loss for many people tied to the public school system. It used to be an honor to teach in the traditional public school system; losing students to this new sector is a loss of stature. It causes embarrassment.

Questions and Comments

Phil Andrews, *Georgia Charter Schools Association:*
Districts don't own kids; they have no right to them. We shouldn't even talk about districts "losing" students. The public provides money so the kids get educated.

Tom Scullen*, Appleton Area School District:*
Pain helps no one. We should help districts understand that charters can help them and help kids and families. We should encourage districts to embrace charters. This is in the best interest of charters too, because charter schooling will fail if it tries to become a second track of public education. There isn't enough money to support two systems.

Rofes*:*
There's another reason to protect districts: if a charter goes out of business, the district must welcome the kids back. There has to be financial recognition of that.

Eileen Ahearn*, National Association of State Directors of Special Education:*
Some charters are their own districts—those that are defined as LEAs. These will always have a different type of relationship with districts than the charters that are part of a district.

What Happens if You Can't Close Schools ?

Closing low-performing schools is a central tenet of the charter model. But this has proven to be extremely difficult in practice—parents regularly oppose efforts to close schools, and the public has serious doubts about the concept. In this environment, how can the sector monitor quality and sustain its commitment to accountability?

Speaker:
David Cantor, Vice President, Glover Park Group

To begin with, the public knows very little about charters, and what they think they know about charters is often wrong. We're dealing with a public with no information or misinformation.

"We're dealing with a public with no information or misinformation."
– David Cantor

The public wants accountability; they respond positively to that term. They like the idea of accountability being applied widely; they think everyone should be held accountable, including schools, kids, parents, teachers, and administrators. Much of the public blames parents for our educational problems.

One surprising negative in our market research is that many people think that charters are not accountable. Also, focusing attention on closing schools is not the way to build support among the public. They don't like this part of accountability. Urban, minority, and low-income populations dislike the idea of closing schools even more than the general public. They all much prefer the idea of fixing schools, not closing them.

A general concern is that charters represent a disruption to kids and families to begin with. Closing the charter means another disruption and one that might leave students vulnerable. If the charter closes, where do the kids go?

People in focus groups remembered instances of charters closing down, and they didn't like it. They prefer the idea of putting schools under new management.

Speaker:
Karlena Glenn, Director of Membership and Chapter Development, Black Alliance for Educational Options

I was the board chair of a charter school in Detroit that was forced to close its doors. I saw my school open, operate, and then close—I've been through the entire life cycle of a charter school.

Closing a school has a terrible emotional impact on everyone involved…parents, students, teachers, and the neighborhood.

When the process begins, parents want to know why their school is closing when the lower performing neighborhood schools are staying open. They see that the situation as not being fair and that they're the ones suffering.

"Yes, closing a school is good for the movement as a whole, but it isn't always good for the families involved."
– Karlena Glenn

When we got the notice that we were going to be closed, the school's staff and the families both stayed with us. They wanted us to remain open. They didn't want to go back to the old schools they previously attended. Yes, closing a school can be good for the movement as a whole, but it isn't always good for the students and families involved.

I believe that there has to be a statewide or national metric to determine which schools stay open and which close; otherwise it will always appear to be arbitrary from a parent's perspective.

Speaker:
Tom Nida,
Senior Vice President,
United Bank

"Mergers and acquisitions—not closures—happen in the banking industry because regulators understand that the primary goals are taking care of customers and maintaining public confidence in the system."
– Tom Nida

I got involved in the charter movement first as a banker—an investor in the movement. Part of the ongoing challenge for me is convincing other conservative investor types that the movement is stable, that it is going to be here for the long haul.

At the DC Public Charter School Board, we have the opportunity to close a school for academic reasons for the first time after year five. But we monitor them constantly and provide feedback and assistance along the way. They won't hear from us for the first time in year four-and-a-half.

We're adopting the "80-20" rule. We will dedicate 80 percent of our staff time to working with the more needy 20 percent of schools—those that are new or struggling.

This year, we've had to encourage one school to close and we actually revoked another. They were vastly different cases. One had 80 kids; the other had 700. When we began the revocation process, parents couldn't believe it; the school was safe and their kids liked it. That was a real lesson for us.

There are alternatives to simply closing a school, and we've tried a new strategy—in effect, taking it over. That way, we keep possession of the building and take care of the kids. In a case this year, two days after the revocation we had a memorandum of agreement with a school willing to take it over. It was a soft landing for everyone involved. We're going to produce a case study of this because it was so orderly and so anomalous. The central question we tried to answer was, "what works best for the kids involved?"

Now, as a board, we want more control over future "mergers and acquisitions." We need to be able to transfer assets from one nonprofit to another. We'd also like the power to remove a school's board members instead of closing the school. Currently, we only have the revocation hammer.

We want more power to do mergers and acquisitions. Banks don't go under anymore. You might hear that one is in trouble, then a few days later, it just has a new sign and new name—it continued serving people without disruption. Mergers and acquisitions—not closures—happen in the banking industry because regulators understand that the primary goals are taking care of customers and maintaining public confidence in the system. Yes, you can always pull the plug, but that has to be the last resort, and it has to be for the right reasons.

Speaker:
James Merriman, Executive Director, SUNY Charter Schools Institute

It's a fair assumption that we won't be able to close schools at the type of scale needed to solve our quality problems. There's a good reason why we can't close schools: a core group of active parents will always fight it. They want their school; they just want it under new management.

We have to realize that all of the benefits of closures are at the movement level; all of the costs are at the local level. But there are benefits: closures seem to remind other charters that quality is of utmost importance and closing bad charter schools increases our overall test scores.

"Whether a politician loves or hates charters, they will always oppose a closure because there is nothing in it for them."
– James Merriman

But closing schools is terribly complicated and difficult. It is a huge burden on the authorizer—one that they may want to avoid. It takes lawyers, accountants, state bureaucrats, and sometimes the courts. Most authorizers don't have the staff capacity to manage this well.

The political side is nasty. You'll always have angry parents and angry politicians. Whether a politician loves or hates charters, they will always oppose a closure because there is nothing in it for them.

Here's my conclusion on why we won't ever have closures at scale: the benefits are too diffuse, too abstract, and too long term; and the costs are too concentrated, too real, and too controversial to be sustained in the intensely political environment that is public education.

Then what do we do about accountability?

First, we still close some charters—the absolute worst. Second, authorizers need to be more choosey at the entrance gate; it's easier to deny an application than to close a school. Third, when we close, we have to have other options available to the affected families. That means we need to think strategically and develop clusters of charters not just lone outliers. Fourth, we need to grow out of the quality problem: we need to start a lot more good schools.

Questions and Comments

***Roger Gerber**, North Carolina Charter Schools Association*:
The best way to close bad schools is to take away their supply of students. We can help that by doing a better job of informing parents.

"As an association guy, I'm never going to be in favor of revocations; that's not our job. We're here to help schools improve; they are our members."
– Tim Daniels

Nida:
All authorizers have their own learning curve, and in DC we're still learning too. We've gotten better on the front end; there is a difference between the schools authorized in the first two years and those that came afterward.

Tim Daniels, *Pennsylvania Charter Schools Association*:
I'm happy that authorizers are getting better determining which applications will lead to good schools, because as an association guy, I'm never going to be in favor of revocations; that's not our job. We're here to help schools improve; they are our members. Revocation is the job of authorizers.

Anita Nelam, *Founder and President, Harte Crossroads Public Schools:*
You might want to reconsider that position. Many of our funders are committed to having state groups on the side of quality. Another important issue involves race. Too often closures involve White authorizers shutting down schools that are serving Black kids and parents. That causes tension.

Greg Richmond, *National Association of Charter School Authorizers*:
The authorizing bodies in New York, Chicago, and Los Angeles — and both authorizers in Washington, DC — are led by African Americans. That's good, but I don't want anyone to think that that will matter a bit when they go to close a school.

Deepening the Talent Pool

If the charter movement is to expand, we need to develop the next generation of leaders. We need more teachers, school leaders, heads of support organizations, and policy people. We also need more diversity in the talent pool, including gender, race, ethnicity, geography, income, and background. But where do we find these new leaders, and how should we recruit and train them?

Speaker:
Eleanor Perry, Associate Professor, Arizona State University

The Leadership for Educational Entrepreneurs program marries an M.ED program to an MBA for current or future charter leaders. We believe that in order to grow the talent pool we need to tap the talent already in the movement, offer meaningful internships with mentors, and make better use of the assistant principal role.

We need to diversify the leadership pipeline, and that means finding potential leaders in different places. We don't want all of our leaders to look the same. We also heard from current and potential students that field experiences were too few in other programs; so we do field experiences in every semester. We offer internships at all levels of government and in the for-profit and nonprofit sectors.

We need to do more with the assistant principal role — make more use of their skills, provide better training.

"An unexpected development for us has been that our graduates are being recruited out of the charter sector and into traditional systems."
– Eleanor Perry

An unexpected development for us has been that our graduates are being recruited out of the charter sector and into traditional systems, because they recognize that these folks have educational and business skills. The traditional sector is awakening to the fact that traditional preparation programs aren't the best, much less the only, source for leaders. We have the opportunity to change traditional programs: we ought to encourage them to require mentorship programs, management training, and meaningful internships.

The movement needs to develop a succession plan for charter leaders; we have to recruit and train new leaders to take over for the more veteran ones—this is becoming a real problem in Arizona. And governing boards need to change their thinking and be willing to hire and then support young principals with professional development.

One final thought: imagine what we'd gain if we'd pull our resources and form a consortium of everyone providing leaders for the charter sector. We could make a lasting contribution to the movement and provide a real service to those in the pipeline.

Speaker:
Marta Reyes, Director of Charter Schools Office, CA Department of Education

We need more charter supporters in SEAs and LEAs, in county offices, and throughout the government. As it is now, most of these folks haven't been in our schools and don't understand what we need.

I think we need to start our recruiting earlier; I want to reach them when they're in high school. I also want students who think in terms of math and science—problem solvers who understand inputs and outputs.

Leadership development is an investment: we have to work hard to find high-quality people and then spend the necessary resources to train them. An important part of recruitment is improved messaging—we need to find target audiences and develop messages that inspire and hook them.

Finally, we must partner with everyone possible to deliver the wide range of assistance programs needed by our emerging leaders.

Speaker:
Johnathan Schnur, CEO, New Leaders for New Schools

At New Leaders for New Schools we view leadership training as a vehicle — a tool to increase student achievement. You can't have a great school without a great principal. The job of a teacher is different than the job of a principal, so we shouldn't recruit them the same way.

We decided to find people with the same characteristics of high-performing school leaders and then first give them extensive training and, second, the support to be successful leaders.

"Over time, we learned that we had been undervaluing something during our recruitment process: the hunger for learning and feedback. Some of our first recruits thought they had nothing else to learn."
– Jonathan Schnur

We know that recruiting and selection are crucial. Training alone isn't enough.

We want people with a deep belief in the capacity of every child to learn at high levels. They have to have a real orientation on results and a sense of personal responsibility that adults determine what kids learn. They also have to have exceptional communications skills.

Over time, we learned that we had been undervaluing something during our recruitment process: the hunger for learning and feedback. Some of our first recruits thought they had nothing else to learn. To be successful, you have to want to get better, no matter how good you already are. Also, project management skills and execution are crucial; being a big thinker isn't enough. Too many of our first leaders didn't have adequate problem solving skills.

Then comes the training: a summer at Wharton, learning about instructional leadership, organizational change, and general management; then a year in full time residency at a school. But they aren't there just to watch — they are responsible for improving student learning in a certain area or grade level.

Systemic change will come about from schools and networks of schools generating future leaders. We need to find teachers and then cultivate them and let them grow into leaders. External institutions will continue to be important, but we have to look within our schools, as well.

The issue of diversity is critical. We need to spend more time figuring out what the barriers are and how we can achieve diversity at all levels of leadership. We've had some success here: two-thirds of our graduates are people of color and two-thirds are women. But this is expensive: we spend $20,000 per person on recruiting alone.

Speaker:
Scott Hamilton, President, Pisces Foundation

Ten years ago, I really thought that if we had the right charter laws everything else would take care of itself. The dirty secret when I was doing charter work in Massachusetts was that most of the applications were terrible. What made it worse was that you could have a good application and then create a terrible school; the best application I saw ended up being the worst school. Too many charter zealots didn't appreciate the importance of leadership.

Building leadership from within is crucial. At KIPP, this year we had seven Fisher Fellows—individuals who will start new schools. But we have 20 sustaining leaders, folks from inside our schools interested in taking over a school.

The education sector is naturally handicapped because it doesn't seem to attract the risk taking entrepreneurial types—hardworking and caring, yes—but not entrepreneurs.

My lesson over the last 10 years is that this is about people not policies. Policies are necessary but not sufficient.

Two-thirds of KIPP leaders are Teach for America (TFA) alumni, and about one-half of our teachers are TFA or TFA graduates. They play a huge role in our movement and there are lessons to be learned from them.

I believe that if we want really good leaders in the charter world, we can't keep waiting for people to come to us. Just "getting the word out" is a lousy strategy; you have to go out, find them, court them, and recruit them.

"The education sector is naturally handicapped because it doesn't seem to attract the risk-taking, entrepreneurial types—hardworking and caring people, yes—but not entrepreneurs."
– Scott Hamilton

A few years ago TFA had 400 corps members and four recruiters. People thought they had reached their peak. Now they are at 4,000 corps members and rival McKinsey in college campus recruiting. The point is that recruiting matters. But it takes work, time, and money.

The message also has to be right. I've learned through our polling and focus groups that everything I've been saying about charter schools over the last 10 years is exactly what you would say if you want to turn people off. I constantly talked about fewer rules and shutting schools. People hate that.

We need to make the job of starting and running high quality schools easier through CMOs, mentorship programs, and other possibilities. Of KIPP's 45 school leaders, probably only five of them would have started schools if they hadn't had the extensive support structures behind them.

I used to believe that scale and quality were opposite ends of the spectrum, but Wendy Kopp at TFA has found the opposite to be true. They have a bigger staff

and budget than ever, and they are now able to find better people. Why? Well, the word is out. Scale has given them name recognition and credibility; it brings more people to them. Hiring great people is easier for her now. The quality of management in her organization has increased rapidly in the last five years.

Report of the Quality Task Force

The Alliance formed the Task Force on Quality and Accountability in early 2005 to develop recommendations to comprehensively improve the quality of charter schools. The Task Force included the leaders of some of the nation's highest performing charter schools and several other national experts on school quality. Their final report was released at the summit.

Speaker:
Anita Nelam, Founder and President, Harte Crossroads Public Schools

The Alliance wanted to gather some of the top school leaders to identify paths to school excellence. We wanted recommendations that would help all schools no matter their level of achievement right now.

The task force visited schools in Washington, DC, Chicago, New York City, New Haven, and Denver. After visits we would work for two days discussing the various issues tied to quality.

I've been on a lot of committees in my time, and this was without a doubt the most extraordinary group of people I've ever had the pleasure of working with. These are extremely busy, extremely successful people who took their time to help school leaders and children they would never meet.

Speaker:
Dacia Toll, President, Achievement First

We need to own the quality of all schools in our movement. If some of our schools are not succeeding, that represents reality for hundreds or thousands of kids. And it's something that we will be saddled with politically.

I believe that we have a couple of years to improve our quality, and if we don't, then we've not lived up to our promise. We would need to be put out of business like our model says.

"An oil spill is enormously damaging to the entire oil-producing industry; it doesn't matter what it says on the side of the tanker, all companies suffer the consequences. So they do a superb job of self-governing in the interest of self-preservation."
– Dacia Toll

Our findings can be summarized in seven principles:

- First, quality is more important than quantity. More schools are not enough; they have to be excellent schools.
- Second, non-academic goals are important, but charters' primary aim is increased academic achievement.
- Third, charters must achieve at high levels; marginally better or different is not good enough. This is a particularly difficult issue for authorizers when parents love the school because it is safe and better than the neighborhood school but it's still not good enough. However, fundamentally our goal is not to be marginally better.
- Fourth, charters must be internally accountable and use assessments to constantly improve operations. In the movement, there is a growing awareness of the value of data. The task force was clear that assessment and innovation are not enemies.
- Fifth, no charter model is people-proof. We need to make significant investments in building a talent pool of top-notch leaders and teachers. KIPP is very good, and I think Achievement First is very good. But none of these models work without the right people.
- Sixth, charters must receive the same level of financial support as traditional public schools.
- Seventh, every charter support organization should be a force for quality. The task force was firm that no one — not funders, not associations, not politicians — should push for growth ahead of quality.

Consider the "oil spill" analogy. An oil spill is enormously damaging to the entire oil-producing industry; it doesn't matter what it says on the side of the tanker, all companies suffer the consequences. So they do a superb job of self-governing in the interest of self-preservation. Every time we have a failing charter, it affects all of us.

Speaker:
Greg Richmond, President, National Association of Charter School Authorizers

We envision the landscape of charters as three tiers: a top tier of superior schools. They probably have waiting lists, they might be growing, and they might be replicating. We need to make sure they remain free of regulations, have the resources they need, and get the support necessary to educate more children.

The middle tier has schools that haven't reached that point yet. Their results are fine, but we have to monitor them closely and make sure they receive the assistance needed to improve.

The lowest tier has persistently low-achieving schools. After having adequate opportunities to improve, they need to be closed with clear criteria, a transparent process, and support for affected families.

"We could get good charter laws and have NCLB convert a lot of failing schools into charters, but unless we get better leaders it will be an enormous lost opportunity at best, a disastrous liability at worst."
– Greg Richmond

You can find all of the specific recommendations in the report itself, but we'll outline a few here.

- First, we must let data drive our decisions. Charters are about outcomes. Autonomy is a means, not an end. All stakeholders must monitor outcomes, so schools should make data a central part of their decision-making process. We also must make data available to families so they can be informed decision makers.
- Second, let's invest in human capital. New Leaders for New Schools and KIPP have shown leadership in this area, but we all need to spend more energy here. We could get good charter laws and have NCLB convert a lot of failing schools into charters, but unless we get better leaders it will be an enormous lost opportunity at best, a disastrous liability at worst. We need to develop a battle plan to increase the supply side.
- Third, we have to address our public policy problems. Charters need equitable funding. According to the Thomas B. Fordham Foundation, charters are underfunded by approximately $1,800 per student. Second, charters laws need to support quality not just growth. Every provision—whether about authorizers, contracts, waivers, whatever—needs to point toward high performing schools.

Designing Version 2.0

The summit concluded with four breakouts charged with designing the next phase of the charter movement in specific areas. The entire group reconvened and each session reported out on their recommendations.

Finance

Creating a level playing field that funds charters adequately.

Speaker:
Bryan Hassel, Director, Public Impact

Our group tried to answer two questions: "What is a fair funding environment?" and "What can we do about it?"

We developed five points on fairness:

- Funding systems should be transparent and student-based with dollars following the child. In state finance systems, there are so many pots of money that it's hard to know what's available and who's getting it. Charters never have access to everything that they should.
- The majority of funding should come from states. Financing inequities are almost always the result of the reliance on local funding. The more that comes from the state, the more equitable the system will be for charters. And that state money should flow directly to charters and not through any intermediaries.
- Charters must achieve parity in all areas, including pensions, insurance, special education, and facilities. The bottom line should be the same: charters should receive an amount equal to whatever is spent on traditional public schools.
- When it comes to applying for and accessing the different streams of funding, charters should face a minimal administrative burden. Currently, some pots are so difficult to secure that charters choose not to apply.
- Finally, more information needs to be made available to charters, so they understand what is available and for what purposes.

"In state finance systems, there are so many pots of money that it's hard to know what's available and who's getting it."
– Bryan Hassel

So, what can we do to move toward this ideal in the states? Two strategies are available: litigation and legislation. Both will be state-specific, but national leadership is needed.

- First, the movement needs a central clearinghouse of knowledge on charter finance. States need to know which systems and formulas work for charters and which don't.

- Second, states should have access to model finance legislation and political strategies. Certain parts of the ideal already exist in different states; the more these are documented and disseminated, the better.
- Third, a few states should be targeted for intensive action. The rest of the nation will benefit by learning which messages and processes work and which don't.
- Fourth, state associations need to be strengthened so they can lead on these issues.
- Fifth, the Alliance could play a leadership role on finance matters at the national level, including forming partnerships with other organizations that are interested in related issues, such as equity in education funding.

Political Support

Build sustainable coalitions that will support chartering regardless of the results of the next election.

Speaker:
David Cantor, Vice President, Glover Park Group

The first thing we decided is that you can't build coalitions without first getting your message right. And as a general rule, parents, teachers, and students should be an integral part of all messaging.

We have to figure out how to better define charter schools. We need to do more research and then widely disseminate the results. We should try to reach three audiences:

- Political elites—policymakers, lobbyists, editorial boards, etc.
- Opinion elites—those who read papers, contact representatives, join organizations
- Demand targets—voters and parents.

"As a general rule, parents, teachers, and students should be an integral part of all messaging."
– David Cantor

To reach political elites, we have to lobby, conduct more school visits—anything to increase the visibility of charters. To reach opinion elites, we need more paid or earned media. To reach expansion targets, we need more grassroots activism. This sounds like a lot of different work but each technique reinforces the others.

We identified five:

- First, states could make great use of messaging aids, such as template press releases, commercials, and mailers. States could also use advice on communications strategies and messengers'.
- Second, the movement needs a clearinghouse of communications best practices.
- Third, a rapid response network that gets information to states, schools, and parents quickly is also needed.
- Fourth, we need to make this issue bipartisan again. Democrats should be cultivated and mobilized.
- Fifth, current and future leaders at the school, local, and state level need media training.

Human Capital

Build a pipeline ensuring talent and diversity at all levels of the movement.

Speaker:
Rob Briscoe, Department of Education and Skills (England)

We all agreed that the charter movement must dedicate increased time and energy to developing human capital. We looked at several different areas:

- School leaders: We should begin by pulling together all of the lessons and knowledge generated by the organizations already running leadership programs. We also need to project how many leaders are needed and by when. Then we can determine whether the existing programs have sufficient capacity to produce what's needed or if some other project is needed.

  We must also move from the heroic model to the distributed model of leadership. The position of leader must be made more attractive. In its current form it seems overwhelming, and, to many quality individuals, its responsibilities will seem onerous.

"We must figure out what drives people to become leaders within the movement. We don't yet know this, so we aren't able to develop highly successful recruitment and training programs that will capture and cultivate the people we need."

– Rob Briscoe

We must figure out what drives people to become leaders within the movement. We don't yet know this, so we aren't able to develop highly successful recruitment and training programs that will capture and cultivate the people we need.

- Teachers: We had a long conversation about what types of programs need to be in place to get better teachers, and this flowed directly into a conversation about the relationship between the needs of charter teachers and teachers in the traditional system.

Great charter teachers must be flexible, nimble, and adaptable; we need to figure out how to find more of these people. We also agreed that traditional training programs must become more selective and more rigorous; we need existing programs to produce people with the skills the charter movement needs.

It is also critical that we find teachers who are willing and able to teach all types of kids. We must take seriously our responsibility to provide teachers with ongoing training in this area. Finally, we foresee it becoming more common for teachers to move from the traditional sector into charters, so we need to develop orientation programs so they are prepared for our differences.

- Activists, especially parents: We identified several barriers to their greater involvement and they all flowed from a lack of information. If we are to have more supporters and more active supporters we need to communicate more consistently with our audiences and have a clear, positive message.
- Quality of school-level boards of directors: Not only do we need directors for new schools, we need to plan for successions. The general consensus is that employers are an untapped pool of talent.
- Supportive policymakers: While we should continue to go to them in order to lobby and inform, we also need to bring them to us. That is, they need to see our schools and understand what we are accomplishing.

Law and Policy

Amend federal and state laws to promote rapid gains in the number and quality of charter schools.

Speaker:
Macke Raymond, Director, Center for Research on Education Outcomes

"We all agreed that the first step is making sure the fundamental charter bargain—flexibility for accountability—is made clear to policymakers at all levels."
– Macke Raymond

Our discussion was arranged along two dimensions. The first was whether we should defend our current position or go on offense. The second was which activities should be federal and which should be state-based.

We all agreed that the first step is making sure the fundamental charter bargain—flexibility for accountability—is made clear to policymakers at all levels. Related to that is our movement's need for a central, positive message that everyone uses as the anchor for their various policy goals.

Our defensive goal should be the protection of our fundamental bargain. We need to continue fighting for autonomy and flexibility, and in return we need to make sure all of our schools are held accountable.

We should have three offensive priorities. First, we need full, backpack funding—a system where funding follows children to the school of their choice. Second, we need multiple authorizers in every state. Third, we need a shift in the determinants of supply: the number of charters in any given state or city should be a function of parental demand not legislated caps.

At the federal level, we need to codify the right of all children to excellent schools and choice. We also need a common definition for what a charter is, what it isn't, and what they require.

About National Alliance for Public Charter Schools

The National Alliance for Public Charter Schools is the national nonprofit organization committed to advancing the charter school movement. Its ultimate goal is to increase the number of high-performing charter schools available to all families, particularly low-income and minority families who currently don't have access to quality public schools. The Alliance provides assistance to state charter school associations and resource centers, develops and advocates for improved public policies, and serves as the united voice for this large and diverse movement. For more information, visit www.PublicCharters.org.