LESSONS FROM THE FIELD

Mary Carmichael
Terry Croy Lewis
Elisa Falco
PURPOSE:
LIFT THE HOOD ON CSO GOVERNENCE ENGINES & INSPIRE CSOS TO EMBRACE GOVERNANCE DEVELOPMENT AS PART OF THEIR CORE PURPOSE IT MAKES EVERYTHING ELSE EASIER.
Cross the Continental Divide of Great Governance
Terry Croy Lewis, Ph.D.
Vice President of School Quality and Support
Colorado Charter Schools

• My background:
  – I have been in the Colorado charter school sector for almost 20 years.
  – Founder, Governing Board Member (currently on an AEC board), School Leader

• League began in 1993

• League staff: 17.5 FTEs
  – President: Nora Flood
Colorado Charter Schools

- The first two charters opened in Colorado in 1993:
  - The Connect School, Pueblo
  - Academy Charter School, Castle Rock
- Today we have 223 charter school campuses in Colorado.
- Over 101,000 students attend Colorado charter schools.
  - This equals 11.7% of total K-12 public school enrollment in the state.
League’s Strategic Plan: Governance Metrics

• Increasing member schools’ governance capacity (as measured by a survey of board chairs in May 2014)
  a) % of schools reporting that a majority of the board has been on the board for at least 12 months
  b) % of schools rating the board as 8 or higher in the effectiveness of its oversight of management
The Governance Training Landscape in Colorado

- Governance training is not mandated by state statute.
- Colorado Charter School Program (CCSP) grant recipients are required to complete a certain amount of governance training.
The Governance Training Landscape in Colorado

• Options include:
  – Charter School Board Training Modules available on the Colorado Department of Education (CDE) website
  – Board Continuing Development – CDE/League partnership
  – Board Fundamentals - CDE/League partnership
  – League Annual Conference
  – League Customized Training
  – League Strategic Planning
  – Charter 411 Help Desk
# Governance – CCSP Grant Technical Assistance Requirements Training

<table>
<thead>
<tr>
<th>CCSP Grant: Tech Asst Requirements - Governance</th>
<th>Events per year</th>
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<tbody>
<tr>
<td>Charter Board Training Modules</td>
<td>30 modules – complete collectively</td>
</tr>
<tr>
<td>Board Fundamentals</td>
<td>2 events (Fall and Spring)</td>
</tr>
<tr>
<td>Board Continuing Development</td>
<td>2 events (Fall and Spring)</td>
</tr>
<tr>
<td>Board member attends 3 or more break out sessions at the League conference</td>
<td>Once per year</td>
</tr>
<tr>
<td>Specialized board training</td>
<td>League or other approved trainers</td>
</tr>
<tr>
<td>Performance Management for boards</td>
<td>League or other approved trainers</td>
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League Stats – 2014-2015 SY
By the Numbers...

- League’s trainers (on staff) – 2 - Nora and Terry
- League’s Cadre of Governance Trainers (contractors) – 3
- Total number of governance trainings last year – 28 (Nora and Terry facilitated 43% of these)
- Total number of strategic planning sessions last year – 9 (Nora and Terry facilitated 100% of these)
- Cost – Governance Training – half day, $650
  Strategic Planning – 2 or 3 days - $1,000 to $2500
Outreach Strategies: We don’t need any stinking training!

- Nora is our secret weapon. Who wouldn’t want to spend a day with Nora?
- School visits, marketing
- Onboarding on our new schools
- Membership Council Reps
- Authorizer’s Visits
- Administrators Mentoring Cohort
- CDE support – CCSP Grant
Contact Information

Colorado League of Charter Schools

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Supporting Quality Governance

Elisa A Falco
Vice President of School Services
efalco@gacharters.org
Georgia Charter Schools Association

My background:

• 12 years experience working in the charter sector in Georgia
• Founding faculty, board member, principal, parent

Association Info:

• Association Staff – 15 full-time staff
• Association President – Dr. Tony Roberts
Georgia Charter Schools...by the numbers:

- There are 74 autonomous charter schools in Georgia.
- Georgia’s charter schools serve over 50,000 students, based on 2014 enrollment data.
Governance Training in Georgia

Georgia Charter Statute
- Annual training required
- SBOE Rule 160-4-9-.06

Annual Requirements
- New members – 15 hours
- Existing members – 9 hours
Governance Training in Georgia

GCSA’s Governance Offerings

- Whole board team training on effective governance
- Customized retreats
- Charter school finance and budgeting
- Webinar series
- Board bank
- Annual conference
- Operational assessments
- Strategic / succession planning
- Board member affinity group
- Sustainability institute
GCSA Participates in Two Governance Retreats for the State Charter Schools Commission (SCSC)

GCSA is on contract with the Georgia Department of Education to assist charters deemed “at risk” due to governance problems.

We provide training for local school boards on effective authorizer practices.
Training Conducted:

- Trained 51 governing boards
- Conducted 2 retreats for the SCSC
- Facilitated and wrote 4 strategic plans
- Conducted 3, two-day board retreats
- Worked with 3 “at risk” schools
GCSA’s Trainers:

• Elisa Falco
• Waynica Staples
## Training Fees

<table>
<thead>
<tr>
<th>Service</th>
<th>Cost</th>
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<tbody>
<tr>
<td>Fundamentals of effective Governance (3 hours)</td>
<td>$1,000</td>
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<tr>
<td>Webinar Series</td>
<td>$50 / person per 1-hour webinar</td>
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<td></td>
<td>($20 / person, per webinar when paired with another service)</td>
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<tr>
<td>Strategic Planning</td>
<td>Facilitation Only - $2,500</td>
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<tr>
<td></td>
<td>Facilitation &amp; Plan Development $10,000</td>
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<tr>
<td>Charter School Finance &amp; Budgeting</td>
<td>$300 per person</td>
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<tr>
<td>Operational Assessment</td>
<td>Basic - $4,500</td>
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<tr>
<td></td>
<td>Comprehensive - $6,000</td>
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<tr>
<td>Charter Policy Manual</td>
<td>$2,500</td>
</tr>
<tr>
<td>Board Bank</td>
<td>Free</td>
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<tr>
<td>Sustainability Institute</td>
<td>$2,000 - $4,000, depending on scope of work</td>
</tr>
<tr>
<td>Board Member Affinity Group</td>
<td>Free – Meets quarterly</td>
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Marketing and Outreach

- Annual visits with all members schools
- Community meetings
- Chambers of commerce
- Authorizer meetings
- Affinity groups
- New school development and training
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What does the Alliance do?

Governance Work:

Orientation Program
Advanced Board Training and Retreats
Strategic Planning
Leadership Hiring Process Coaching
State Required Orientation

Section 59-40-155. Within one year of taking office, all persons elected or appointed as members of a charter school board of trustees after July 1, 2006, shall complete successfully an orientation program in the powers, duties, and responsibilities of a board member including, but not limited to, topics on policy development, personnel, instructional programs, school finance, school law, ethics, and community relations. The orientation must be provided at no charge by the State Department of Education or an association approved by the department.
Contact information

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Find the governance slides:  http://www.sccharterschools.org/board-training-and-elections
LESSONS FROM THE FIELD

Which programs are having the most impact? Are you measuring that for funders or for the CSO strategic plan?

Please share how you avoid “preaching to the choir” and engage/prioritize schools that really need governance training, strategic planning, and/or support services. What do those outreach strategies look like?

Could you share the short version of the business plan of your governance work? Percent of funding from philanthropy, percent fees for service. Is it self-sustaining without philanthropic dollars?

How do you transition groups from startup charter committees doing a lot of volunteer work to a governing board? – How do you keep them engaged in your services?
QUESTIONS
Mary Carmichael
Terry Croy Lewis
Elisa Falco