



Who We Are



ABOUT US

Education Cities is a network of 31 city-based organizations in 24 cities united by one North Star goal: increasing the number of great public schools.

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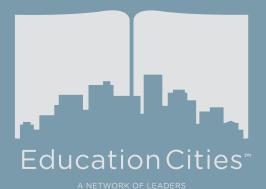


TABLE OF CONTENTS

Introduction	5
Section I: Supporter + SUPPORTER CHALLENGES	6
Section II: Funder + funder challenges	17
Section III: Advocate + ADVOCATE CHALLENGES	27
Key Takeaways	36

INTRODUCTION

How can cities create the conditions through which great public schools emerge and grow? At Education Cities - a national network of city-based organizations dedicated to improving public education - answering this question is central to our work. We call the members of our network education "harbormasters," as they create and coordinate complex ecosystems that foster the growth of high-quality public schools.

There are four main elements to the harbormaster strategy: investing in quality school growth, strengthening effective educator pipelines, advocating for positive public policies, and engaging community members as partners. We believe that in concert, these four distinct strategies create the conditions for high-quality public schools to launch, grow, and persist.

Attracting and supporting great charter school operators and entrepreneurial school founders to launch and expand is a key tactic in the quality school growth strategy. In many respects, the effectiveness of harbormasters depends on their ability to identify and meet the needs of these operators. No matter how mature the city's education ecosystem, the needs of operators should heavily influence the harbormasters work.

Given the importance of school operators in meeting our members' high-quality school growth goals, Education Cities is interested in the question: what do operators want? What roles and activities of local harbormasters are most, and least, helpful to those running great schools?

Between October and November 2015, we interviewed 18 operators in eight member cities. The range of operators included new single-site schools, well-established homegrown charter networks with multiple campuses, and local charter operators that have scaled nationally. Operators also represented a diverse group of cities with varying levels of charter market share and maturity.

Our goal is to shed light on the various roles harbormasters can and should play for operators, and surface the nuances inherent in these relationships. We hope feedback from operators will help city leaders assess and reflect on the roles they currently play, and tease out the root causes of common tensions they may feel with operators in their day-to-day work. We offer these perspectives in hopes that the views of operators will inform the strategies of harbormasters.

Our conversations surfaced three key roles harbormasters play that help or hinder operator progress:

SUPPORTER	FUNDER	ADVOCATE

This brief will walk through each role, surfacing the most helpful activities, while highlighting common challenges and pitfalls to avoid.



Supporter

As an effective supporter, the harbormaster is tactical, flexible, and focused on helping operators problem solve. In a true support role, the harbormaster is sensitive and attentive to the unique needs of the operator or entrepreneur, as well as to the market at-large. They are also willing to adjust their approach (and staffing model) to be more effective over time if necessary. In this role, harbormasters are also trusted thought-partners, and leverage their local knowledge and connections to help operators meet their needs and overcome barriers to growth. The key activities of a supporter include:

Being responsive

Serving as a trusted partner and advisor

Leveraging local knowledge and connections

Developing solutions to fill ecosystem gaps

(1)

Being responsive

Many operators think it is most beneficial for harbormasters to individualize their support based on unique needs. Being an effective supporter means getting to know each entrepreneur or organization and helping them troubleshoot major barriers they face. Over time, the relationship will likely need to shift from the harbormaster telling the operator, "here's what's best for you," to asking, "what do you think is best?" or "what do you need?"

"Each operator has their own individual pieces holding them back. Identifying school leaders early enough may be an impediment. For [us], it was facilities. We didn't ask the harbormaster (HM) to solve any of the others because they're not bottle necks at the moment."

"They're hitting the nail on the head with what they do and adjusting to changes that come up and new information. They've done an unbelievable job to help be the liaison and continue to provide sustainability for us in this market."



Serving as a trusted partner and advisor

Particularly in operators' early stages of development and/or when they are entering new markets, harbormasters provide meaningful thought-partnership to help craft strategy and navigate the local landscape. Operators find that with the right experience and expertise, harbormasters have effectively advised on business planning, growth models, school design, and policy and governance issues. Critical activities to help new operators get off the ground included navigating (and buffering against) district and state bureaucracy, supporting the development of charter applications, adding staff capacity when resources are limited, and advising on board development. At their best, harbormasters inspire innovative thinking and problem solving, enabling operators to think big while being cognizant of legitimate barriers to their expansion.

"[HM leader] is an incredible resource through her connections and experience, particularly in school development. Thought-partnership from her is instrumental."

"We had this challenge in that we knew we needed to expand, but adding a high school was financially a challenge and risk for our board. [HM leader] really helped us to get our board motivated around this idea that we can replicate and add a high school and adult programs."

"[State DOE] is such a regulatory hurdle. [HM] helps operators streamline report processing and compliance reporting. It's extremely bureaucratic in enforcement of regulations. For high-performing operators who are trying to grow, it's a challenge."





Leveraging local knowledge and connections

In every new city, it takes time for operators to identify and connect with the right people, build political support, and develop relationships with families and community organizations.

Some operators see the harbormaster as the hub on a wheel of local connections, minimizing the time it takes to meet the right contacts and lending social and political capital to get relationships off on the right foot. Relationships at the state and district level can also help operators navigate a new policy environment and gain political cover to successfully launch. Ideally, harbormasters' deep understanding of the local context can help operators plan for growth, effectively recruit students, and meet actual, rather than perceived, needs of communities.

"I reached out to [HM leader] because of his connections at the state. They've acted as a great liaison and champion. They get the word out about what we're doing, they're our cheerleader, they help us get better at presenting ourselves, and help us navigate the [state] landscape. We expanded to other states and it would have been so instrumental to have an organization like them."

"Any of the pieces of what we're working on that involve community outreach to kids, families, school leaders, and staff members – we would absolutely look to [HM] given their network. We will lean on [HM] as our resource to tell us what the needs are and context is to make sure our work is responsive."

"[HM leader] carries a lot of weight. He's been everywhere and politically his name is worth a lot. He's really bright at solving problems."



Developing solutions to fill ecosystem gaps

Talent and facilities are typically the two greatest needs cited by operators across the country, both of which require creative and uncharted solutions. One large network shared that their single nonnegotiable factor for entering a new market is a feasible pathway for facilities to meet their growth goal. Another shared that talent was their most underestimated challenge when they entered a new community.

On facilities, the complexity and high costs of building acquisition require the coordination of multiple partners, and harbormasters are uniquely positioned to be successful in this area. On talent, operators acknowledged that harbormasters' work recruiting organizations like Teach for America and the Relay Graduate School of Education has been effective, but that there is more to be done to increase the profile of their cities to attract a larger, and more diverse, pool of candidates.

"With the facility - [HM] acquired a building, renovated that building, and leased it to us at reasonable terms. Nonetheless there's still work around conditional use permits, dealing with city managers - driving that political side of the facility process has been huge. In other cities, someone on my team has driven that work. It's hugely time consuming. [HM] folks have driven that work and kept us abreast."

"Lending entities don't feel comfortable lending money for major renovations. The political environment isn't stable enough. We tried to refinance with a private lender and they said no."

"Talent is always going to be hard. How can we continue to bring more folks to the [city] marketplace? It's a challenge for the city and it could be exciting for [HM] to play a bigger role there."

"We do a lot of principal training internally, but we're always trying to find the best teachers. We hired 300 teachers last year. In [city] it's harder than we would have thought. Principals are hungry for the best people. It would be great if [HM] helped make [city] sexy and get people to the city to create a larger pool."

Supporter: Challenges

Operators need clarity about their harbormasters' theory of change and core competencies, as it is critical to managing expectations. And while operators welcome support, harbormasters must maintain credibility and a respected brand to avoid tarnishing the work of great schools with political toxicity. It is incumbent upon harbormasters to maintain a healthy dose of humility in order to provide helpful, effective support to operators. The main challenges inherent in supporting operators include:

Modeling strategic clarity and executional effectiveness

Maintaining credibility

Ensuring alignment

Being selective about programming



Modeling strategic clarity and executional effectiveness

Without clearly articulating a theory of change or set of strategies, harbormasters can easily confuse operators - this concern was one of the most prevalent. It can be murky, confusing, and in turn, frustrating, to interact with an organization that doesn't have a clear sense of its core activities, expertise, or capacity.

"How can they refine their focus? It's been a little bit of a lot of different things in the past. I've heard similar things that people would prefer clarity of focus around their role."

"It's murky as to what is the strategy or path forward? It's unclear how much of the work the leadership is doing and capable of doing... what's the broader vision? It'd be great if there was a calendar for the rest of 2016 with events, big outcomes for the year, a clear plan for fundraising...right now it seems hazy."

"In theory it makes sense for [HM] to take the advocacy teams from each school to come together to take things on, but they don't have enough staff to build it at the ground level, so it's confusing and messy. And they're not really bringing capacity and expertise into the conversations."

"In the planning year they forgot about us. There's a difference between bringing [a national CMO] over. They underestimated how much work it was when you don't have a staff during the planning year."



Maintaining credibility

In some communities, the harbormaster brand can provide political cover necessary to launch schools for new or outside operators. However, some shared that their local harbormasters are not viewed as having credibility in the community, which becomes a political liability. Operators cited examples of their local harbormaster failing to honor pledges (i.e., fulfilling funding commitments), or acting disingenuously (i.e., engaging stakeholders in a process related to a decision that's already been made).

To maintain credibility, harbormasters must follow-through on promises and work to become a trusted partner and leader.

"[HM's] relationship to the broader community is polarized. It has inhibited our success. Our brands are super-blurred. By and large, people know [us], like our schools, they like me, and our school leaders, and so they don't hate us, but there is hate for [HM]. And that carries over."

"We found out that they couldn't raise that funding. It was a 'soft' promise to be fair, but as an incubator to promote new schools, what are the formal pieces that they are going to do?"

"There have been questions in leadership. They are super powerful and great dynamic folks, but the leadership lens hasn't solidified yet. That will be important in the next couple months for them to figure out. We are all hungry – what does 2.0 [HM] look like? We're all just getting started, so there's questions and concerns about that."

"Once we launched I never heard from them again...there's so much more work we could have done together."

Ensuring alignment

Particularly as the landscape gets more crowded, operators want harbormasters to play a greater role in developing a citywide strategy for quality school growth. This type of citywide planning is necessary to eliminate redundancies, streamline resources, and ensure that needs are met across neighborhoods. At the same time, the harbormaster should have a clear understanding of the ecosystem gaps that will prevent growth goals from being met, and develop a plan to support the short- and long-term needs of operators.

"To me it hasn't felt like coordination or alignment between the various entities, which would be helpful. Specifically because on the charter side of the house...how are we actually planning for neighborhoods? If W network grows to X schools and Y network grows to Z schools, what does that mean for the city? If we're supporting these four networks doing these things, are we actually meeting the elementary/middle/ high school needs? Are we meeting the east side and west side needs? People don't know what everyone else is doing. There's an opportunity for [HM] to support some of the coordination efforts to better meet the needs of our city."

"We were extremely clear with [HM] going in that we believe [our] role is to run phenomenal schools. We see the need for much larger change and believe in it. But we don't want to be leaned upon in every way if that takes away our ability to run great schools."



Being selective about programming

Harbormasters frequently convene operators to discuss challenges and identify solutions. According to multiple operators, these meetings often lack a clear purpose, and the harbormaster does not follow-up after the event. If the harbormaster makes any commitments to act on issues raised in the conversations, they must be addressed in the future, rather than forgotten. Although events can start important conversations between operators, it was reported that the highest impact operator collaborations are pursued through the personal relationships of network or school leaders.

"There have been a few attempts [at collaboration]. Not really successful as far as producing results. There was some good dialogue but nothing took hold. What they've been most successful at is bringing people together and putting ideas on the table. Implementing something, on the other hand, has been a challenge."

"It's been super helpful since the initial launch phase to have the relationships with the other operators. The convenings they do are great, the conversations with [other charter leaders] and between the teams have been incredibly valuable."

Funder

Many operators have the goal of being sustainable on public dollars, but there are significant upfront costs that require external philanthropy. Operators unanimously reported that one of the highest-leverage roles harbormasters can play is as a funder, providing resources for start-up and expansion while maintaining a transparent, robust process for raising and distributing the dollars necessary. Operators also view streamlined due diligence processes as a sign that the harbormaster understands, and is sensitive to, their needs. Key activities as a funder include:

Creating a financial runway for planning and launch years

Expanding the funding pool and maintaining transparency

Streamlining due diligence

Creating a financial runway for planning and launch years

Entrepreneurs who have launched, or will be launching, new school models, even with prior experience at high-performing charter management organizations (CMOs), report difficulty getting funded for a sufficient planning period. By directly funding, or helping entrepreneurs connect with other funders, harbormasters can meet a critical need for those launching new schools. In a world in which national operators aren't scaling quickly, and national funders are concentrating start-up resources in fewer cities, start-up funding from harbormasters becomes increasingly important.

"Most funders are going to fund once you get to the first attendance point. But how will you get off the ground? Fund me while I'm planning so I don't need to have two jobs. I need two years for planning or else I'm out. Start-up capital is a big deal."



Expanding the funding pool and maintaining transparency

In states where there is a lack of political will to provide charters with equitable funding, operators benefit when harbormasters serve as a conduit for national funders and distribute the funds with transparency. It helps when the harbormaster is clear about whether they fund schools equitably across their portfolio, favor those with the highest need, or invest significantly in those with the longest track record of success.

"At the end of the day, it's funding; bringing new funders into the space."

"We have a very difficult environment around funding. [HM] has their own funding streams. But they don't have a transparent relationship between their fundraising and how it would relate to their schools. They could work more openly to build fundraising capacity in the state."

3

Streamlining due diligence

Creating a simple, efficient grant process can build goodwill and trust from operators. Being thoughtful about the necessity of every component of the process, and getting feedback from operators after the fact, can increase efficiency and save time for both the harbormaster and the applicant. As an aggregator of local funding, many harbormasters have already taken steps to streamline the diligence process for operators, as long as their role as an aggregator is clear (i.e., operators are confident that they can get maximum dollars by applying through the harbormasters' process rather than making unique asks to numerous local funders).

"Their diligence is very efficient. They are not looking for us to create a big package or grant application. We're really grateful that they haven't forced us to create new materials. We had phenomenal conversations with team members about what they'd be asking for. They are very up front in saying, here's the list of things we're looking for, if any of those are better served as a conversation, that's fine. It's mostly me pulling together stuff that I've already produced and designed. It's a relatively light lift on our part, which is rare."



Funder: Challenges

Operators also surfaced tensions with harbormasters as funders, especially when they simultaneously serve as a support mechanism and thought-partner. The challenges harbormasters run into as funders include:

Striking a balance between being a supporter and a funder

Acknowledging real funding needs

Knowing when to get out of the way



Striking a balance between being a supporter and a funder

Striking the ideal balance between being a funder and a supporter can be challenging. Operators may be reticent to 'air their dirty laundry' in an effort to remain an attractive grantee, but in turn may limit a harbormasters' ability to be an effective supporter. Building and maintaining an honest relationship, as well as a clear and transparent diligence process, is critical to striking this balance.

"Something I've been trying to balance is that we are right now trying to pursue getting funding from them. They're also consulting and supporting us - balancing the application process to try to get this funding while at the same time wanting to be transparent about the things we're working on."

"[HM] offered pretty valid criticism, but with the financial role, we're left wondering, what's your purview and purpose? How do you feel really good about the lane you're in? How is that transparent? I appreciate directness, but it can seem threatening. Their advice gave us pause to think, is this the right match?"



Knowing when to get out of the way

Some operators raised that their harbormaster wanted too much oversight and acted too much like a 'traditional funder.' It may do more harm than good if the harbormaster does not recognize when to get out of the way and trust the operator to do their job.

"I felt like it would be a situation where, if you take the money, as a result you would be accountable to them...it's a very demanding relationship. There's a very gray area about who's actually in charge."



Acknowledging real funding needs

Acting as a recruiter and a funder, harbormasters should be transparent about the current and future funding reality to operators. Several operators shared that they were under the impression from their harbormaster that the local funding landscape was more robust than it turned out to be. Operators also feel that harbormasters must be more empathetic and acknowledge the real funding needs they have, particularly during planning and launch years.

"[They could] help new schools connect with funders and foundations that are interested in the beginning of schools. Our goal is to operate on public dollars but [HM] forgets how tight that is for the first few years. Connecting and making sure that fundraising for schools is set for the first one to two years, involving school leaders in any way possible is great."

"There's been such excitement to bring in more and more charters, but they overestimated the philanthropic landscape in [city]. There's a lot less than is needed to get to sustainability...everyone's competing for philanthropy, talent, and kids."

"We need more money. Thankfully [national operator] didn't come... in such a small market, it's not ok. Immediately you run into the challenge...if [HM] is raising all the money, the local foundation says [HM's] raising all the money and you already got your piece."



Advocate

As an advocate, harbormasters use their relationships, influence, and political savvy to create the conditions for operators to succeed. The main activities of the harbormaster advocate role include:

Creating favorable political conditions Building a positive public narrative Focusing on operator recruitment



Creating favorable political conditions

ELECTORAL POLITICS

Harbormasters are well positioned to find and support candidates for local office that support charter schools. Many operators rely on their local harbormaster to find these individuals who can help make conditions favorable to charter school growth.

"There is still significant and positive work going into getting great board members elected who have helped change the conversation. I've seen some work at the city council level to help ensure that charters are part of the conversation, but we are not in a place where significant reform is happening and dissenters are drowned out. [City] is certainly not in that place, but the conversation about the need for reform is there. The conversation about quality is starting."

"[HM] got two really great school board members. From our first to second charter, it went to a 4-1 vote of approval from a 1-4 vote. [HM] has their sights set on all the right things—need to give it time to play out."

GOVERNANCE REFORM

Harbormasters also play a critical role in creating new governance options for operators that establish pathways for growth while maintaining essential autonomies.

"[HM] has played a huge role with charters... ours helped create policy that allowed us to go in with charter status but in a district building. We get cheaper rent and access to transportation services. [HM] played a big role in helping that happen, which has been critical to our growth and will allow us to grow more over time."



Building a positive public narrative

A UNIFIED VOICE

Deep-seated myths about charter schools still prevail in most cities, negatively impacting everything from teacher recruitment to student enrollment. Operators think harbormasters could play an extremely useful role in changing the dominant public narrative about charter schools through public messaging campaigns. There is significant interest to have unified messages for the sector 'to speak in one voice as one movement.' In larger cities, operators are looking to harbormasters to create a citywide movement to educate parents about quality options and choice.

"The democratic voice has every state running the same message around charter schools. It doesn't matter what community I'm in. 'Charters are selective, they kick out kids, they have selection bias against special needs.' Families have heard those messages and internalized those messages. So many times we talk to families, they say, that sounds great, but we can't afford it."

DIRECT SUPPORT TO OPERATORS

Operators also expressed interest in having harbormasters help them be more sophisticated with their own communications tactics. Publicizing successes, according to operators, could help them attract new families to enroll.

"We hustle, but we're such amateurs in what communications is. There's a science of understanding buyers. If it was a for-profit model, our communications would be so completely different. When we package our stuff, we should know our customer—we can't do that and very few of our peers do. A harbormaster could really help the portfolio of charters get good at it."

"We're doing a lot of innovative work seeded by [HM]. A lot of it is not public knowledge - we need a dissemination grant to document, highlight different approaches or strategies that are making a substantial difference. We don't have the resources. That would help the movement greatly."

"... we could use all the help we could get in many ways in terms of working with parents...we've done a poor job of getting people aware of the issues. If they could help us do that really well, along with other charters, that would be fantastic."



Focusing on operator recruitment

The more targeted recruitment tactics are, the more impact they have on operators and entrepreneurs. Ensuring they gain direct access to major political and community players during the 'courting' process can help operators feel as though the city is behind the effort. Also understanding what their needs and concerns are, and specifying how the harbormaster and its partners are uniquely positioned to help meet them, can build operators' confidence to either make the leap or develop deeper roots.

"[HM leader] got me access to the Executive Directors, the Mayor, the heads of the biggest foundations, the head of the state's department of education, and I started to say, this is different... you could be a big fish in a smaller pond."

"...the biggest area I've had concern about is that relative to other cities that have recruited us to grow, they have been under-aggressive... there are bells and whistles from every other city but nothing from them, which gets difficult to justify in leadership team meetings."

Advocate: Challenge

Despite good intentions as an advocate, there are times when harbormasters execute plans poorly or negotiate policies that negatively impact some operators. Harbormasters should consider the consequences that their advocacy actions may have on operators.

Consider unintended consequences

Operators are strongly affected by the political environment in which they run schools. Supportive state law and local policies can make all the difference between surviving and thriving. Despite the tremendous effect they can have, particularly around funding and autonomies, political decisions are often made through backroom deals, lacking transparency and inclusivity. Assuming the harbormaster has the right political connections to be influential to the way certain policies are designed, there is tremendous opportunity and risk. Even well-intentioned policies are liable to have unintended consequences, particularly if operators are not brought into the conversation. Harbormasters should be highly sensitive to the fact that politically expedient decisions may benefit one segment of operators, while unintentionally negatively impacting the work of others. This is especially important to consider in politically unstable environments where charter operators are already frequently under fire.²

According to operators, harbormasters serve multiple roles that are essential to their ability to launch, grow, and be successful. There are also cautionary tales of overstepping boundaries, inconsistent communication, and disjointed support.

Below are several key takeaways that cut across all three roles — supporter, funder, and advocate — for harbormasters to consider.

(1) Build a strong brand

Harbormasters must take risks and will surely inspire opposition as they challenge the status quo. But for the sake of the operators in their city, harbormasters should seek to maintain a strong reputation as an advocate for quality schools, without veering off into activities that may attract dissenters.

(2) Maintain honesty and transparency

Harbormasters should avoid making empty promises at all costs — both in recruitment and implementation phase. When recruiting operators, harbormasters must be careful not to promise nonexistent funding or minimize ecosystem gaps, as it will only lead to mistrust down the road. Also, it is better for the harbormaster to say no than to fall short on commitments due to capacity or prioritization.



Empathize with operators' point of view

Although most operators want what's best for the city at-large, they also must prioritize their own school, parent, and student needs. Acknowledging this tension and maintaining honesty around this will be key for harbormasters to maintain successful relationships and a healthy ecosystem.



Create and communicate a strong theory of change

Harbormasters must clearly communicate a coherent theory of change and set of activities to operators. To the extent possible, the harbormaster should consider what short-term and long-term supports will look like, or develop a plan with operators to assess whether the support being provided should adapt as they progress.



Have a citywide plan

Harbormasters should avoid making empty promises at all costs — both in recruitment and implementation phase. When recruiting operators, harbormasters must be careful not to promise nonexistent funding or minimize ecosystem gaps, as it will only lead to mistrust down the road. Also, it is better for the harbormaster to say no than to fall short on commitments due to capacity or prioritization.

These takeaways illustrate the need to treat operators like a client or customer: prioritizing their needs, setting clear expectations, and delivering on promises. As harbormasters consider the findings in this report, they should address the challenge of how to reconcile their roles as related to operators' self-interest and broader citywide goals. Education harbormasters should also consider how to manage an appropriate balance of these two priorities — not always mutually exclusive, but sometimes in tension — in an effort to sustainably grow the number of high-quality schools in cities across the country.





FOOTNOTES

- ¹ In the text below, we share quotes from interviewees, but have removed all identifiers in order to maintain confidentiality.
- ² Due to the difficulty in maintaining confidentiality by sharing specific examples, we are not including quotes in this section.



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