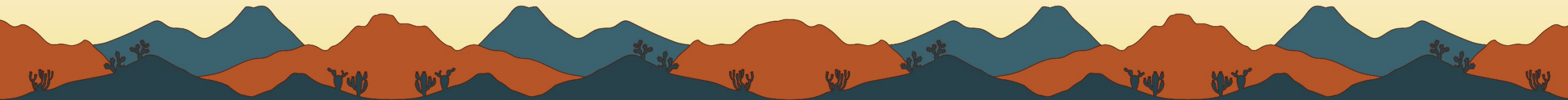


2017 NACSA LEADERSHIP CONFERENCE

OUR CHOICES MATTER



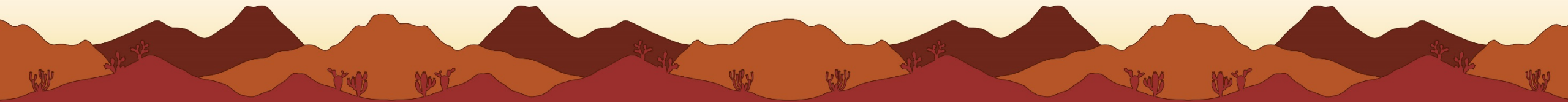
HOW TO BUILD AND LEVERAGE RELATIONSHIPS TO GET STUFF DONE

Bonnie Holliday, Terry Croy Lewis & Carol Swann

NACSA Leadership Conference

Wednesday, October 18, 2017

1:45-3:00 p.m.



THE BASICS

Today's presentation will address the following questions:

- *Why* should we be concerned with building and leveraging relationships?
- *What* are some strategies that can be employed to increase my agency's strategic influence?
- *How* have others utilized strategic influence to overcome challenges related to charter school authorizing?

And of course...

- *Who* are these presenters, and why should I care what they have to say?

WHY?

Why should we be concerned with building and leveraging relationships?

- Your hard work matters very little if no one is aware you're doing it.
- Your opinions matter very little if no one trusts you.
- Your ability to create positive change is strengthened when you have allies to support your agenda.

WHAT?

What are some strategies that can be employed to increase my agency's strategic influence?

- ***Know the players.*** Who is your target audience? Who are you seeking to influence.
- ***Identify a point person.*** Who is the face of your organization? (This person might vary depending on the audience, but continuity is key for developing and maintaining stakeholder trust.)
- ***Don't underestimate the value of face time.*** Put quite simply: sometimes you need to remind people (in person) that you can be trusted and that you aren't an idiot. Are you actively engaging stakeholders to communicate your message?

STRATEGIES (CONT'D)

- ***Position yourself as an expert. (Study and prepare!!)*** Excellence is the best defense against bias. Are you an expert in your field? Have you anticipated the arguments of your opponents? Do you know the stance of your target audience? Do you understand the larger political context in which you operate? Can you maintain objectivity and present compelling evidence to support your argument? [In God we trust. All others bring data.]
- ***Brevity is KEY.*** Policymakers (governing board members, school board members, legislators, etc.) do not have the time or interest to review the policy manifesto you've prepared. Think: bullet points. Think: one-pager. Think: elevator speech.
- ***Solve (don't create) problems.*** Be of value; help others help you! Are you asking for help or are you offering to help to others? Develop a proposed solution BEFORE you take a problem public.

STRATEGIES (CONT'D)

- ***Develop a support team.*** Even Batman had Robin. Do you have a team that's capable of doing the legwork when you can't? (Researching, writing, preparing, etc.)
- ***Be personable.*** This is easier for some than others, but the face of your organization needs to be a happy one. Be respectful, be honest, and always, always mind your manners!
- ***Follow through.*** Nothing you do well will matter very much if you're not reliable and persistent. Are you building a reputation that will benefit you going forward?
- ***Compromise is not a dirty word.*** Sometimes to get what you want, you have to help others get what they want.

HOW?

How have others utilized strategic influence to overcome challenges related to charter school authorizing?

Terry Croy Lewis – COLORADO CHARTER SCHOOL INSTITUTE

- State-wide authorizer that was created by the legislature in 2004
- Currently serves approximately 17,000 students, 41 charter schools

Carol Swann – METROPOLITAN NASHVILLE PUBLIC SCHOOLS

- District-wide authorizer
- Currently serves approximately 85,000 students, 29 charter schools (11,000 students)

Bonnie Holliday – STATE CHARTER SCHOOLS COMMISSION OF GEORGIA

- State-wide authorizer that was created by a constitutional amendment in 2012
- Currently serves approximately 35,000 students, 28 charter schools

NAVIGATING FUNDING & FACILITIES CHALLENGES IN COLORADO

ORGANIZATION:

- Colorado Charter School Institute (CSI)

IDENTIFIED ISSUE:

- CSI schools have no access to local tax revenue which has resulted in an average per-pupil funding gap of over \$900 per student.
- Uneven playing field given that some districts shared mill levy funds on some level with district authorized charters

CSI: ADVOCACY WORK

COMMUNITIES OF PRACTICE

- Initiative supported by the Alliance brought together ed reform partners in the state: Colorado League of Charter Schools (CLCS), Colorado Succeeds, Democrats for Educational Reform (DFER), CSI

FOCUS: FUNDING, FACILITIES, FLEXIBILITY

- Primary focus: funding equity through sharing of local mill levies

CSI: POLICY OUTCOMES

BILL PASSAGE

- Successful passage of mill levy sharing (HB17-1375) on last day of session:
 - Requires school districts to distribute funding they receive from local property taxes generated by Mill Levy Overrides (MLO) on an equal per pupil basis to district charter schools beginning in the 2019-2020 year.
 - Out of recognition that CSI schools have no access to local tax revenue, the bill created the Mill Levy Equalization Fund, a mechanism for providing equal funding to CSI students.

However, no dollars were allocated to the CSI fund, resulting in a significant funding inequity for CSI charter schools

Since June, we have worked hard to have the dollars allocated to the fund for the 2018-2019 year. As of today, \$5.5 million is in the Governor's budget, but there is a long way to go.

CSI: REFLECTING ON SUCCESS

WORK IN PROGRESS

- School visits with legislators and other key stakeholders
- Joint Budget Committee Legislators and Staffers
- Colorado Department of Education
- Ed Reform Partners

COMMUNITIES IN PRACTICE COALITION

- Intentional coalition building – with a real commitment and agreement on policy goals
- Persistence
- Willingness to tailor the narrative
- Ability to pick the right messengers
- Building trust among the coalition

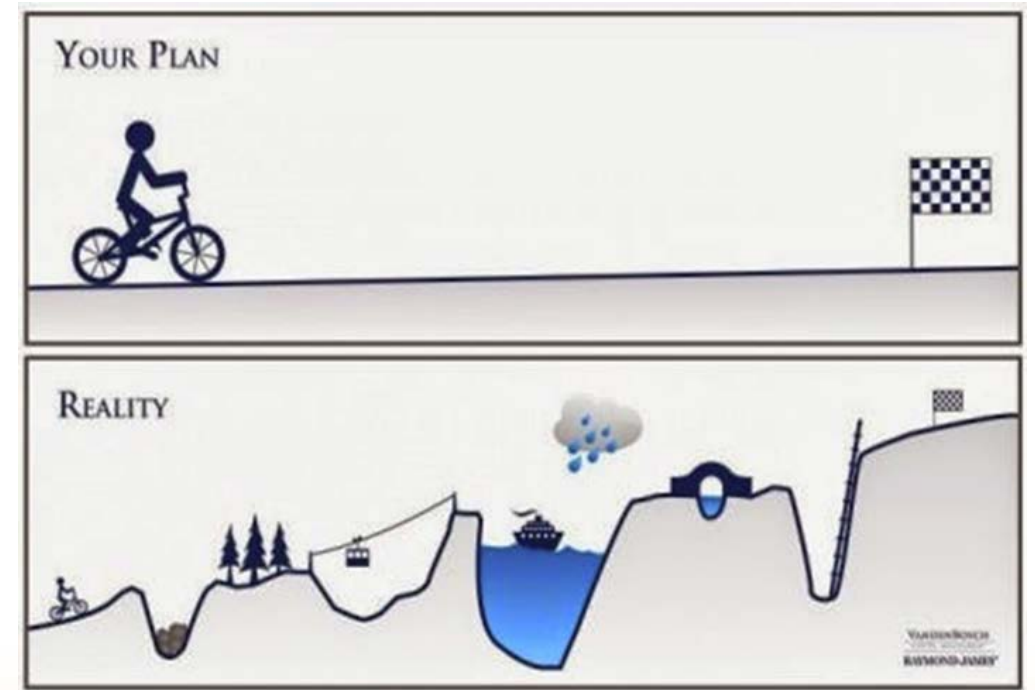
OVERCOMING POLICY CHALLENGES IN NASHVILLE

ORGANIZATION:

- Metropolitan Nashville Public Schools (MNPS)

IDENTIFIED ISSUE:

- No authorizer fee to offset costs of charters
- TN law states the district is a “pass-through”, and 100% of our state and local education dollars must go to the charter schools based on their enrollment



MNPS: IDENTIFYING ALLIES

COALITION OF LARGE SCHOOL SYSTEMS (CLASS)

- Since we do not lobby directly, we needed someone else to assist us – and we found the perfect people.
- The CLASS lobbyists work with all things MNPS related at the state level, and we developed a good relationship with them.
- This became crucial – they were able to reach legislators and present the case when we could not.

MNPS: POLICY OUTCOMES

CREATION OF ADMINISTRATIVE WITHHOLD

- Legislation created a 3% authorizer fee with a cap of \$35,000 per school

BENEFITS OF PARTNERSHIP: EMERGENCE OF GRASSROOTS SUPPORT

- Partners can help you spread your message to those who might not otherwise have “ears to hear.”

MNPS: REFLECTING ON SUCCESS

COMPROMISE IS NOT A DIRTY WORD!

- When we learn how to work together instead of against each other, things start getting better.
- Sometimes to get what you want you will have to facilitate someone else getting what they need



MANAGING UP IN GEORGIA: PREPARING A BOARD FOR POLICY CHANGE

ORGANIZATION:

- State Charter Schools Commission (SCSC) of Georgia

IDENTIFIED ISSUE:

- No systems or policies related to standard and transparent accountability standards for charter schools.
- Existing charter contracts contained a wide range of goals that varied in rigor.

SCSC: BOARD MANAGEMENT

PREPARATION AND LEGWORK (OURS NOT THEIRS!):

- Engaged NACSA to conduct an authorizer evaluation, used evaluation results as a springboard for CPF development,
- Incorporated commissioners' feedback and values into CPF construction (mission-driven from beginning).
- Assembled experts to contribute to the process (policy talks, retreat discussions, public meeting presentations)
- Vetted (and vetted and vetted) CPF indicators and weights with stakeholders prior to SCSC action.
- Studied accountability schemas from other states; capitalized on Georgia's longitudinal data systems
- Prepped and briefed board members for what to expect throughout the adoption process. (They're going to get calls. You need to help them with talking points.)

SCSC: POLICY OUTCOMES

CPF ADOPTION

- Successful adoption of the SCSC's new accountability tool: the Comprehensive Performance Framework
- Increased transparency for schools and stakeholders resulted from passage. (The CPF assesses schools in academics, finances, and operations. All CPF metrics and scores are posted on the SCSC website.)

BROAD SUPPORT FOR ACCOUNTABILITY SYSTEM

- Though the process of CPF development and adoption was time and labor intensive, it resulted in a wide-spread support of SCSC accountability systems (and—by default—accountability decisions).

SCSC: REFLECTING ON SUCCESS

PREPARATION PAYS OFF

- Backward planning is essential. You **MUST** allocate enough time to prepare yourself and others. (Motto: It may not always be good news, but it won't ever come as a surprise.)

BE ACCURATE BUT (FOR PETE'S SAKE) BE BRIEF

- It's **YOUR** job to know every data point (not theirs)!
- Too much information is as useless as too little information.
- Practice distilling your message. Once it's edited, edit some more.

ANTICIPATE QUESTIONS AND KNOW YOUR AUDIENCE(S)

- Different stakeholders have different needs. Think through the issue from all sides before, during, and after discussions.

POBODY'S NERFECT

- When you know better, you do better. Don't be a slave to precedent (especially if it's **BAD** precedent!)

FINAL QUESTIONS

- Can these strategies assist you in overcoming obstacles?
- Are there other effective strategies that you've used in the past?
- What resources can NACSA provide to assist you in this work going forward?



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NATIONAL ASSOCIATION OF
CHARTER SCHOOL AUTHORIZERS

