



# Preparing for Growth

## Human Capital Innovations in Charter Public Schools

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Christi Chadwick and Julie Kowal May 2011



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# Introduction and summary

Charter schools and successful charter management organizations that run them have grown significantly over the past decade but they must dramatically increase their scale in order to meet the demand for high-quality public school options for America's children. Today, the nearly 5,000 existing charter schools represent 5 percent of the nation's public schools. For charter schools to be a viable alternative to the more than 2.5 million students in the nation's lowest-performing 5 percent of schools, the number of slots in high-performing charter schools needs to grow almost tenfold.

Historically, however, charter schools have opened at a consistent sectorwide rate of approximately 300 schools to 400 schools per year, a pace that simply will not meet the need. The upshot: Better-performing charter management organizations, or CMOs, must grow at much higher rates, which will require significant resources, including talented people, to make this happen.<sup>1</sup>

The limited supply of effective leaders and teachers is one of the key barriers standing in the way of more rapid growth for CMOs. Current research on rapid growth among highly successful companies suggests that the reliable supply and strategic use of high-quality talent is critical to any organization's growth.<sup>2</sup> Researchers find that the number-one school factor affecting a student's learning is the teacher, and effective school leaders also significantly influence student outcomes.<sup>3</sup>

Additionally, the National Study of CMO Effectiveness found that CMO leaders "overwhelmingly expressed belief that their success hinges on the strength of their people, primarily in schools, but also in the central office."<sup>4</sup> At the same time, other recent studies indicate that CMOs have an inadequate pipeline of school leaders and face a looming shortage of teachers on the horizon.<sup>5</sup> Unless CMOs find strategies to overcome this challenge, they will not be able to meet the demand for growth.

To learn more about CMOs' human capital initiatives aimed toward overcoming this barrier, we conducted case studies of CMOs that have dealt with issues of growth and addressed human capital constraints. Together, these CMOs—Green Dot Public Schools, IDEA Public Schools, High Tech High, KIPP, Rocketship Education, and YES Prep Public Schools—are taking a range of approaches to address their human capital constraints and therefore may provide valuable lessons for charter operators considering expansion, new CMOs, and next-generation efforts to support growth even among mature CMOs.

The CMOs in our study and detailed in this report employed diverse strategies to ensure they have enough great teachers to staff their schools and allow for growth. These approaches fall into the following broad categories: finding and keeping the best talent, growing in-house talent, and extending the reach of teachers to more children. These CMOs cited finding good leaders as a major challenge to growing the charter sector. They take a variety of approaches to address this challenge and to ensure they have enough principal candidates to support the opening of new schools. These approaches include building an internal pipeline, recruiting teachers with high potential to be future leaders, extending the reach of good leaders, and making the job of principals more manageable.

Though CMOs have made great strides in their ability to staff their schools with great teachers and leaders, they still see significant barriers that may prevent them from achieving their human capital goals. These barriers include state and federal policy barriers, a continued shortage of great teachers and leaders, technological limitations, and limited resources.

Through our study we identified key strategies and lessons learned from the practices of six CMOs. Below, we summarize those strategies and provide ideas for next-generation growth. We found that successful CMOs:

- Formalize processes and infrastructure
- Make the most of the people they attract
- Import and induct management talent

In the pages that follow, we will detail these findings, but briefly let's examine each of these in turn.



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## Formalize processes and infrastructure

The CMOs we studied emphasized the importance of formalizing processes and investing in infrastructure to better recruit, induct, and support teachers and leaders. They did this by first determining what worked well—such as looking for specific competencies when recruiting teachers and leaders and providing summer boot camps or residencies to ensure teachers are prepared—and then making those practices an institutionalized part of their programs. Next-generation efforts should build on these experiences by making customary the practice of selecting some candidates as teachers who have the potential for becoming leaders. In the screening process schools should look at candidates for not only what they can provide in the near term as teachers, but also as leaders in the long term. Once they are on the job, schools should provide promising candidates with opportunities to grow their leadership skills.

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## Make the most of the people they attract

The CMOs we interviewed all implemented strategies to make the most of the best candidates they could find. They did this by providing additional training, narrowing the responsibilities associated with the role of “teacher” and “principal” to make the job more manageable, and extending the reach of the best teachers and leaders to serve more students. Next-generation efforts should extend the reach even further by getting great teachers in front of more students. This may be done by offering successful teachers the choice of having larger classrooms in exchange for proportionally enhanced pay; redesigning teachers’ roles and schedules to free up the best teachers’ time and allow them to teach more students; encouraging teachers to specialize in particular areas of instruction and work with students who would most benefit; and taking advantage of technology-enabled resources to provide students with access to great teachers remotely.

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## Import and induct management talent

All of the CMOs we studied have experience working with teachers prepared through nontraditional routes. Many of the CMOs have become adept at choosing teachers with great potential and providing resources and training to help them be successful. CMO’s next-generation efforts should develop ways to import *leadership* talent from outside sectors. Though charter operators have been more

successful with homegrown leaders, it is unlikely that the internal pipeline will be sufficiently large to fuel the kind of rapid, exponential growth needed to meet demand. To grow more rapidly while maintaining quality, the best and most innovative charter organizations need to identify ways to provide proven outside-sector leaders with the training and residency experiences that will make them successful in school leadership.

The growth of highly successful charter schools presents one of the nation's best opportunities to close achievement gaps and meet rising global standards. Finding the talent to fuel that growth presents a challenge that left unaddressed will leave that opportunity on the table. Today, leading CMOs are tackling these human capital challenges and other CMOs would do well to examine their practices and build on them. At the same time CMOs need to adopt next-generation approaches to address human capital needs that catapult them to even higher levels of growth of quality environments, with the potential to meet the high demand for better school options.

# Learning from CMO strategies to address talent bottlenecks

CMOs take a variety of approaches to grow the number of effective teachers and leaders, many of which hold lessons for other CMO leaders and for next-generation efforts for growth. The goal of this report is to provide the field with an understanding of the strategies that leading CMOs employ to meet the human capital demands that come with high rates of growth. The report will convey some of the approaches these CMOs use to attract and retain the right teachers and principals to enable faster growth, while continuing to provide a high-quality educational setting for students. Specifically, the report answers the following questions:

- What strategies and innovations have growing CMOs used to attract, prepare, and deploy excellent teachers and principals to support a significant scale-up in their operations?
- How have federal, state, and/or local policies impacted the success and feasibility of CMOs' human resource innovations?
- What new directions should the charter sector consider?

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## Method of collecting information

To learn more about CMOs' human capital initiatives, we conducted case studies of CMOs that have dealt with issues of growth and addressed human capital constraints. As part of our sample, we wanted to study at least one CMO that had “taken over” or sought to “turn around” an existing failing school. In selecting the CMOs for review, we did not do a comprehensive survey of all CMOs, nor did we engage in a rigorous selection process to identify the participants. We selected six high-performing CMOs for our main case studies that together are taking a range of approaches to address their human capital constraints and therefore may provide lessons for the field. Those CMOs include:

- Green Dot Public Schools
- IDEA Public Schools
- High Tech High
- Knowledge Is Power Program
- Rocketship Education
- YES Prep Public Schools

For each of our main cases, we conducted a detailed review of internal and publicly available information, including reports, articles, prior interviews, websites, and other available documentation on their initiatives. We also conducted interviews with four of the organizations—Green Dot, High Tech High, IDEA, and YES Prep—to collect further detail.

## CMOs in our study

**Green Dot Public Schools** operates 17 high schools and one middle school in Los Angeles, CA. Begun in 1999, Green Dot focuses on leading “school transformation” projects that transform large, failing schools into clusters of small, successful schools that follow Green Dot’s “Six Tenets of High Performing Schools.” Green Dot aims to transform three to four large schools (which will each be broken up into two to four smaller schools) and to open up to three startup schools in the next five years.

**High Tech High** serves students in grades K-12 in nine schools in San Diego and Chula Vista, CA. Launched by a coalition of business leaders in 2000, HTH schools adhere to four basic design principles: personalization, adult world connection, common intellectual mission, and teacher as designer. HTH offers a teacher certification program and operates its own graduate school of education. Next year HTH will open two new schools.

**IDEA Public Schools**, based in Weslaco, TX, serves students in grades K-12 in 16 schools in the Rio Grande Valley. With its first school opening in 2000, IDEA Public Schools operate under a set of principles known as the “Seven Rs,” which govern behavior, curriculum, and culture. IDEA plans to open four schools in 2011, four in 2012, and four to six schools each year after that for the next few years.

**The Knowledge Is Power Program** serves more than 27,000 students in grades Pre-K-12, with 99 schools in 20 states and the District of Columbia. With its first school opening in 1994, KIPP schools operate under a set of principles called the “Five Pillars,” including high expectations and a focus on results. KIPP recently received a federal “Investing in Innovation,” or i3, grant, which will allow it to increase its annual school openings by 50 percent.

**Rocketship Education** operates three elementary schools in San Jose, CA. With its first school opening in 2007, Rocketship offers a unique blended model of education incorporating online learning in the school day. Rocketship plans to open two schools next year and several schools thereafter in each of the next few years.

**YES Prep Public Schools** serves students grades 6-12 in eight schools in Houston, TX. First chartered in 1998, YES Prep operates small schools with extended school days and offers summer school and spring trips to college campuses. Every year 100 percent of YES Prep’s graduating seniors have been accepted into four-year colleges. YES Prep will open two new schools next year and plans to serve 10,000 students in 13 schools by 2020.

# Increasing the supply of great teachers

The CMOs we studied take a variety of approaches to ensure they have enough great teachers to staff their schools and allow for growth. Most of these approaches fall into the following broad categories: find and keep the best talent, grow in-house talent, and extend the reach of teachers to more children.

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## Find and keep the best talent

The CMOs we studied used a variety of approaches to find and keep high-quality teachers. Some of the approaches included using extensive techniques to ensure the selection of the “right person,” providing financial incentives, and enlisting nontraditional candidates to teach in their schools.<sup>6</sup> The three approaches we found were used the most often were:

- Using comprehensive and strategic selection methods
- Hiring candidates from nontraditional backgrounds
- Providing financial incentives to recruit, retain, and reward

Let’s examine each approach in turn.

## Use comprehensive and strategic selection methods

Several of the CMOs indicated they had little success selecting teachers using a traditional interview process. Instead, they developed or found alternative methods to distinguish those with the best potential for success within their organization. These selection methods tend to take more time than traditional teacher interviews but these CMOs believe they are extremely worthwhile. Each spring, High Tech High conducts several full-day intensive interviews known as Bonanzas to determine which among the best candidates (identified on paper and through screening interviews) are a strong fit with the organization.

Candidates participate in interviews with teachers and students, present to a class of current students, and discuss sensitive issues with peers, all while their potential employers observe.

HTH typically includes about 25 candidates in a Bonanza, about which Ben Daley, chief executive and academic officer, says: “We hope that the people we hire will be with us for many years, and so we invest time and resources in getting to know potential candidates.” Bringing in all the candidates on the same day makes the process somewhat more efficient, and it allows school leaders a unique chance to see how well candidates collaborate with their peers.<sup>7</sup>

YES Prep focuses its resources on identifying what qualities make for the most successful teacher within the YES Prep system. The “ideal teacher” is not selected based on technical skills alone, but also on personality traits, which YES Prep believes cannot be taught and tend to be consistent over time. These traits, such as “high levels of energy,” “eager to take charge,” and “driven,” are woven into all decision-making processes related to onboarding and supporting teachers, including hiring, professional development, and teacher evaluation.<sup>8</sup> YES Prep’s focus on these traits aligns with a longstanding research base on the importance of “behavioral competencies” in job success. The research also points to valid and reliable interview techniques that organizations can use to rate candidates on valued competencies.<sup>9</sup>

### Hire candidates from nontraditional backgrounds

The CMOs we identified find ways to bring teachers from nontraditional routes into their organizations: individuals whom the CMOs identify as having the qualities and content knowledge needed to teach but who have not completed traditional teacher preparation programs. YES Prep recruits candidates from outside the field of education and provides them with pedagogical skills to be successful in the classroom.<sup>10</sup> (For more information about YES Prep’s training and induction strategies, see page 11.) High Tech High consistently recruits teaching talent from other sectors, specifically to boost their schools’ instruction in math and science.<sup>11</sup> As described below, HTH has developed its own in-house certification program in part to enable it to confer teaching licenses on nontraditional candidates.

Teach for America is the source of many nontraditional CMO recruits, with nearly 15 percent of teachers hired in CMOs in 2008 being TFA affiliated—either as corps members or alumni.<sup>12</sup> Similarly, many of the CMOs we studied make recruit-

ing TFA teachers a priority in their staffing and growth plans. Rocketship reports that nearly 50 percent of its teachers come from TFA, and it commits to hiring four TFA teachers each year.<sup>13</sup> Likewise, approximately half of the teachers at YES Prep are TFA affiliated, and the CMO credits its ability to grow largely to its partnership with TFA.<sup>14</sup> Further, TFA alumni supply more than 25 percent of the new teachers to KIPP schools nationally and 45 percent to KIPP’s Washington, D.C., schools.<sup>15</sup>

Not surprisingly, leaders at several of the case study sites have a prior relationship with TFA. Their awareness increases their desire to incorporate TFA teachers into their schools. It is significant to note that the founders of several CMOs are TFA alumni, including IDEA Public Schools (Tom Torkelson and JoAnn Gama), KIPP (Mike Feinberg and Dave Levin), Rocketship Education (co-founder Preston Smith), and YES Prep Public Schools (Chris Barbic).

### Provide financial incentives to recruit, retain, and reward

Several of the study sites use financial incentives as a way to recruit, retain, and reward great teachers. IDEA Public Schools provides bonuses to teachers with specific skills or degrees or who stay at IDEA over time. The CMO pays an additional \$7,000 over the first three years to those who teach in critical needs areas—math, science, and special education. Teachers with advanced degrees or certificates can earn an additional \$1,000 to \$3,000 a year, and those with perfect attendance earn \$300 each semester. Additionally, teachers who stay at IDEA earn annual bonuses after their fifth (\$3,500), 10th (\$4,000), 15th (\$4,500), and 20th (\$5,000) year teaching in IDEA schools.<sup>16</sup>

Meanwhile, Green Dot provides a salary schedule that pays teachers 10 percent to 15 percent more than surrounding area schools.<sup>17</sup>

Three of the CMOs we studied have implemented or are planning to implement systems that reward teachers for student achievement. Rocketship Education currently provides language arts and math teachers with bonuses based on their students’ achievement levels. Teachers can receive all or part of the bonus based upon student scores on mid-year and year-end assessments.<sup>18</sup> Two additional CMOs—Green Dot and YES Prep—have both been recently awarded private foundation grants to develop differentiated pay systems for their teachers based on performance. Green Dot is participating in a Bill & Melinda Gates Foundation-funded initiative known as The College-Ready Promise with four other CMOs.

The four CMOs received a \$60 million grant in part to reward teachers for their performance, including their impact on student achievement.<sup>19</sup>

YES Prep Public Schools, with support from the Michael and Susan Dell Foundation, will implement a merit pay system for its teachers as well. The CMO plans to use its Instructional Excellence Rubric to evaluate teacher performance, with teacher pay based in part on these evaluations. The CMO has found the tool to be highly correlated with student achievement and highly regarded by teachers and administrators. In the future YES Prep intends to incorporate direct measures of student performance into its determination of teacher effectiveness.<sup>20</sup>

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### Grow in-house talent

After recruiting and hiring the best available candidates, CMOs we studied induct new teachers into the CMOs' organizational cultures and provide training to increase the teachers' effectiveness in the classroom. While these CMOs make great efforts to find enough highly effective teachers, many have recognized that they must provide additional support to elicit the best from their new teachers in the classroom. IDEA's CEO Tom Torkelson believes that he doesn't always get the "best of the best" to teach in his schools in the Rio Grande Valley. Still, with IDEA's recruiting efforts, he typically gets the "best of the bunch."<sup>21</sup>

To ensure they have enough great teachers to work with all students, the study sites have taken a variety of approaches, including offering formal university-based coursework, supporting teachers with ongoing professional development and training, and enabling great teachers to reach more students. We examine each of these approaches in this section of the paper.

### Offer coursework leading to a degree or certification

Two of the CMOs we studied developed their own alternative certification programs to enable them to reach outside traditional hiring pools and have greater control over candidates' training and preparation. Compliant with all state and federal regulations, both CMOs provide coursework and on-the-job training while teachers work full time in their schools.



Let's take a more in-depth look at each.

YES Prep requires all of its first-year teachers to complete the Teaching Excellence Alternative Certification Program. Jennifer Hines, chief people and program officer, explains how YES Prep initiated the program. "About five years ago, we realized that we needed to help develop the teachers that we needed. So once we find these people with the raw ingredients, we put them through a year of really intensive on-the-job training."<sup>22</sup>

The program begins before the school year, with two full weeks of pre-service training delivered by instructional coaches addressing two primary topics: classroom culture and management; and instructional planning and delivery.<sup>23</sup> During this time teachers also work with a mentor teacher to set up their classrooms and develop plans for the first week of school.

Once the school year begins, new teachers attend monthly workshops on topics such as instructional practices and assessment, and they continue to meet regularly with their mentor teacher to discuss planning, assessment, classroom culture, and student achievement.

Leaders in the school, including mentors, instructional coaches, department heads, and the dean of instruction, all periodically observe new teachers and provide feedback on their development toward becoming "proficient" on the YES Prep evaluation rubric.

YES Prep has found the program to be very successful in inducting its first-year teachers and has opened its doors to local KIPP teachers who wish to pursue an alternative certification as well.

High Tech High offers a free alternative certification as well as a subsidized program to pursue a master's degree to teachers who work at HTH. The HTH District Intern Program began after HTH wanted to hire an uncertified candidate with a Ph.D. in applied mathematics and leaders realized they were unable to do so because the candidate was not considered "highly qualified" under state and national regulations.<sup>24</sup> Leaders at HTH initiated the credentialing program because, as Jennifer Husbands, former director of the GSE, explains, "We questioned the value of traditional preparation programs, especially for HTH schools, which are not traditional schools."<sup>25</sup>

HTH compares its approach with a medical residency program, where students are learning on the job, guided by more seasoned professionals.<sup>26</sup> The program requires teachers to participate in a three-week training during the summer, comprised of a combination of coursework and school-based professional development; followed by an additional 600 hours training, teaching, and working with a mentor over the next two years. Upon enrollment, teachers are granted an intern credential, and they earn the California Preliminary Credential upon completion.<sup>27</sup>

KIPP, along with two other like-minded CMOs, Uncommon Schools and Achievement First, developed a two-year master's degree program through a partnership with Hunter College known as Teacher U. Teacher U ensures their teachers have a solid foundation in both the cultural and academic expectations of the CMOs.

Similar to YES Prep and HTH, enrollment in the KIPP program provides teachers with an initial certification that allows them to teach full time while completing coursework. The program is open to both charter and district school teachers from New York City and focuses largely on information directly relevant to teachers' day-to-day activities and classroom experiences. Teachers must demonstrate gains in student achievement in order to graduate. Last year Teacher U awarded master's degrees to 103 New York City charter and district school teachers after they demonstrated that their students made at least one year's worth of academic growth.<sup>28</sup>

### Provide in-house training and coaching

Other CMOs we studied provide less-formalized induction and training programs to help prepare their teachers. IDEA, for example, was originally less structured in the onboarding and training of new teachers; with growth, however, CMO leaders realized the need for a more structured process. Tom Torkelson, CEO, reflects: "We are doing okay with our recruiting. We are not doing as well with the other issues – onboarding, induction, and coaching folks."<sup>29</sup>

IDEA recently was awarded a federal Investing in Innovation, or i3, grant, which will help the CMO focus on these issues. In partnership with the Phar-San Juan-Alamo Independent School District, TFA, and Dr. Noel Tichy (who designed and launched the New York City Leadership Academy), IDEA will create an "end-to-end human capital pipeline," which will include programs for new teacher induction and training. These programs will borrow heavily from TFA's Summer

Institute and data-driven coaching model.<sup>30</sup> The grant will also establish the Rio Grande Valley Center for Teaching and Leading Excellence, which will provide infrastructure to support IDEA and PSJA in implementing these programs.

Green Dot also typically has had a less formal approach to inducting new teachers but the CMO intends to expand its teacher mentor program. Green Dot has found that strong induction programs include a well-thought-out coaching and mentoring component. This is all the more important, given that all too often new teachers are underprepared to enter the classroom.

Zachary Levine, director of human capital at Green Dot, says: “Teacher preparation programs have a long way to go. They are not preparing enough of the teachers that we need, with the qualifications and skills we need.”<sup>31</sup> Through The College-Ready Promise, Green Dot will develop and implement a yearlong residency program for prospective teachers to ensure they are prepared to teach from the first day of school and to help them improve their practice and increase student achievement over the course of the year.<sup>32</sup>

### Extend teachers’ reach

While most CMOs focus on getting new and more teachers into their schools, one CMO—Rocketship—focuses on extending the impact of its teachers so schools can ultimately do more with less. Rocketship’s leaders did this by identifying teaching tasks that are relatively rote, such as drilling math facts or engaging in daily assessments and grading, and they assign many of these tasks to assistant educators, tutors, and/or computer programs in the schools’ “learning labs.”

Extending the traditional school day enables Rocketship to include a learning lab that is staffed by noncertified instructors. This design maximizes the use of each teacher’s skill set and relieves them of responsibilities that can be carried out by paraprofessionals or technology. A benefit to this structure is that it frees up time for teachers to work with more students on higher-order tasks and to provide more individualized instruction. By enabling Rocketship’s schools to serve the same number of students with fewer teachers, the structure reduces Rocketship’s recruiting needs and allows it to select a high-caliber pool of teachers. In addition, Rocketship’s computer-based assessments save teachers time by collecting data automatically and producing a variety of reports for teacher analysis—time that teachers can devote to engaging with students.<sup>33</sup> Rocketship’s approach is one way to extend the reach of great teachers, but other possibilities abound.<sup>34</sup>

# Increasing the supply of great leaders

As mentioned earlier, the CMOs in our study cite finding good leaders as a major challenge to growing the charter sector. They take a variety of approaches to address this challenge and to ensure they have enough principal candidates to support the opening of new schools. These approaches fall into four broad categories: build an internal pipeline; recruit teachers with high potential to be future leaders; extend the reach of good leaders; and make the job of principals more manageable.

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## Build an internal pipeline

The CMOs we studied focus on their internal pipeline as a key approach to recruiting new leaders.<sup>35</sup> While none of the CMO leaders we interviewed are opposed to hiring external candidates, they tend to prefer candidates already steeped in their CMO's culture. In their experience, candidates who come up through the ranks are more likely to have an understanding of the specific approaches and demands of working in their schools. As Bill Durbin, head of new schools at YES Prep, says, "You cannot microwave in the YES Prep culture; you have to bake it in over time."<sup>36</sup> Additionally, CMO leaders believe they select more effective leaders when hiring internal candidates. Ben Daley, COO and academic officer at High Tech High, explains, "It is very difficult to be a leader in one of our schools if you have not been a highly successful teacher in one of our schools. We have a very tight culture."<sup>37</sup>

While a desire for an all-internal leader pipeline is understandable, research on rapidly growing organizations in other sectors suggests that fast growers can rarely meet their voracious talent demands with an internal pipeline alone. Rapidly growing organizations tend to be aggressive "importers," bringing in talent from other organizations and even other sectors and finding ways to induct the new arrivals into the organization's culture. CMOs seeking to grow more rapidly than the current norm will almost certainly need to "import" even as they cultivate internally.<sup>38</sup>

The internal pipelines of the CMOs we studied often had similar features, such as a careful selection process, differentiated career paths, professional development and training opportunities, and residencies that provide candidates an opportunity to practice and get feedback on their leadership skills. They varied in many ways as well, such as in the degree of formality of their processes and their structures.

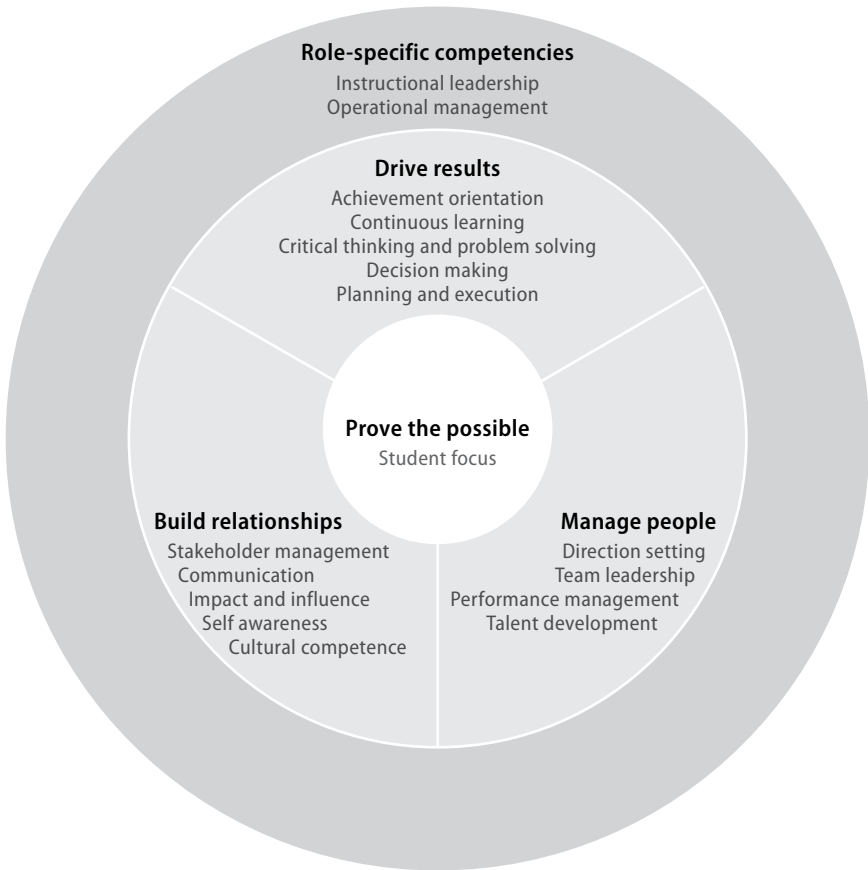
A closer look at the differing approaches holds valuable lessons.

### Select candidates for the pipeline

Though CMOs studied for this report varied in the way they select prospective leaders to enter their pipelines, most have multiphase programs that candidates must complete before beginning school leadership training. The initial stage focuses on the classroom teacher, and candidates generally self-select into initial recruiting programs. The CMOs we studied fall at various places on a continuum of highly formal to more informal processes for the early identification of leadership potential.

- At IDEA, although teachers initially self-select into leadership development activities, CMO staff screen teachers carefully before allowing them entry into the leadership pipeline. Candidates must successfully complete a daylong series of interviews, involving both traditional questions and role play, before they are approved for the Leadership Pathways Program and entry into the internal pipeline.<sup>39</sup>
- Rocketship encourages teachers to develop leadership skills from their first year in the classroom, and requires all teachers to have at least one leadership goal in their Professional Growth Plans. Only select candidates, however, are able to matriculate into Rocketship's leadership pipeline—the Leadership Skills Development Program—once they have demonstrated significant progress on their leadership goals, significant student achievement (attaining 1.5-plus years of growth for all students), and high performance on any assigned leadership tasks.<sup>40</sup>
- KIPP uses its Leadership Competency Model as a framework for identifying candidates for its leadership development program. The model maps out the competencies—skills, qualities, and knowledge—KIPP finds that candidates need to be successful in each of its leadership roles. Through a review of research in the organizational, business, and education fields and through discussions and focus groups, KIPP pinpointed the competencies and behav-

**FIGURE 1**  
**KIPP Leadership Competency Model**



Source: KIPP Leadership Competencies, available at <http://www.kipp.org/school-leaders/training-and-development/leadership-competencies>.

iors they believe are most tied to effective leadership, management, and student achievement. Candidates for leadership programs must demonstrate these competencies or the ability to develop these competencies before they become part of a leadership program (see Figure 1).<sup>41</sup>

Green Dot and YES Prep tend to rely on less-formal approaches for the early identification of leadership potential. YES Prep offers Leading for Excellence Days for professional development. Teachers apply to participate, thus signaling an interest in leadership. When leadership opportunities are identified, central office leaders confer with school principals to identify potential candidates to fill the role. Green Dot created the Teacher Leadership

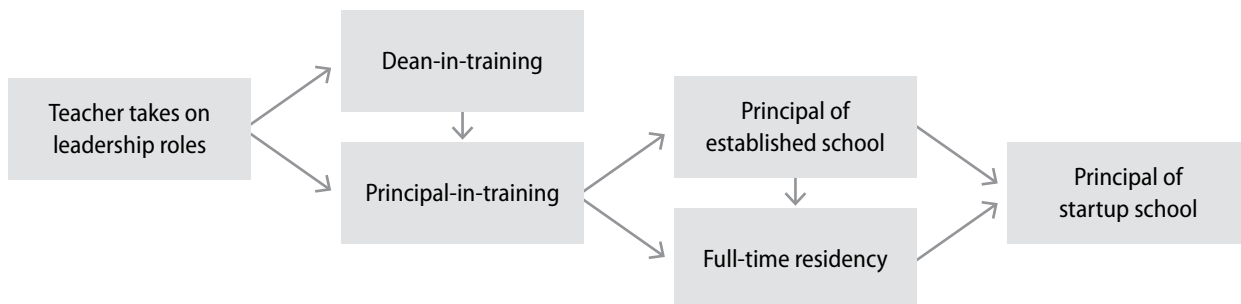
Development Program for identifying and developing teachers for the leadership pipeline. The program allows teachers to self-identify, though they need an administrator recommendation to participate. Additionally, CMO leaders say administrators frequently encourage those they see as having potential to apply.<sup>42</sup>

### Provide multiple, differentiated paths

Some of the CMOs we studied offer multiple, differentiated paths to leadership through their internal pipeline. KIPP, for example, using its Leadership Competency Model, offers leadership programs that target participants at different points on their career path. Leadership opportunities include grade-level chair,

**FIGURE 2**  
**Multiple pathways to school leadership**

The graphic below demonstrates some of the paths a candidate might take to becoming a principal in one of these CMOs' schools.



assistant principal, successor principal, and founding principal.<sup>43</sup> Rocketship also provides several paths to school leadership that begin while teachers are still in the classroom, including embedded learning opportunities to assume roles such as teacher mentor, instructional manager, or school culture manager; a dean-in-training program; a startup principal-in-training program; and a takeover principal-in-training program; for those interested in working in an established Rocketship school.<sup>44</sup> At both of these CMOs, candidates may enter at various points in the pipeline and may participate in all or only some of the programs on their path to the principal position (see Figure 2).

### Offer leadership training

A key component of internal pipeline programs among the CMOs we studied is leadership training opportunities for participants. These opportunities take a variety of forms, from formal coursework to one-on-one meetings with mentors. Let's examine each.

#### *Formal coursework*

Several of the CMOs we studied make use of university-based coursework to prepare leaders in their internal pipeline. KIPP provides its founding and successor principal candidates with intensive coursework in a university setting and the opportunity to earn both a master's degree in educational leadership and an administrator's credential.<sup>45</sup>

High Tech High has gone one step further and developed its own graduate school in education that offers advanced degrees in school leadership to interested individuals within and outside of the organization. HTH is not only the first CMO to operate its own graduate school of education; it is the nation's first GSE that is embedded within a K-12 learning community.<sup>46</sup> HTH participants pay a subsidized rate of tuition and learn skills from financial management to instructional leadership during a two-year, part-time program designed for working teachers and administrators. Leaders at HTH believe the graduate school develops future administrators with a deep understanding of the HTH mission and vision and helps retain staff in the organization.<sup>47</sup> As of December 2010 the program had graduated four internal and two external students. Three of these graduates have been offered school leadership positions at HTH. Six additional candidates (three internal and three external) are on track to graduate in June 2011.<sup>48</sup>

#### *In-house workshops*

Most of the CMOs we studied cited the value of in-house training to build leadership skills. IDEA offers a two-day training known as the Leadership Cadre Program to any current staff members who would like to attend. The training sessions address leadership and instructional topics about everything from how to run grade-level meetings to ways to make substantial differences in student achievement. The program, however, is not simply a lecture series and participants are required to be actively involved and experiment with putting information into practice. The program engages participants by beginning with information sharing, including relevant demonstrations, then requiring participants to model or actively work with the material themselves and provide real-time feedback throughout. Torkelson, CEO, believes this model of professional development has proven to be effective in bringing about behavior change.<sup>49</sup>

YES Prep provides workshops as well, known as Leading Excellence Days. Applicants for the workshops must apply to attend by submitting a resume and letter of intent outlining their interest in leadership. As with IDEA workshops, participants are not passive observers; those planning to attend must prepare for the meeting ahead of time, and during the workshops they are actively involved in role play, simulations, and presentations. Participants receive immediate feedback from coaches and leaders, which often changes the course of an activity. One teacher who recently became grade chair found the day challenging and rewarding, concluding that, "Leading Excellence gives you an extraordinary opportunity to learn, grow, and ultimately take strides that continue to help our children get the education that they deserve."<sup>50</sup>



### *One-on-one coaching and feedback*

Several CMOs we identified are very intentional about providing their future leaders with opportunities to learn and receive coaching and feedback through one-on-one sessions with other organization leaders. KIPP’s founding principals in training, for example, have biweekly phone calls with coaches to get feedback on their development.<sup>51</sup> Leaders in training at Green Dot and YES Prep have opportunities—both formal and informal—to receive direct feedback on their growth and development throughout their path to the principal post. While at Rocketship, a key piece of leadership development is defining leadership goals in candidates’ Professional Growth Plans, on which future leaders get one-on-one feedback multiple times throughout the year.<sup>52</sup>

### *Provide residency opportunities*

Many of the CMOs we studied offer a full-time residency program as part of their internal pipeline. These residencies—ranging from 10 months to two years—allow participants to be paid staff members of a CMO and to take on many of the duties of a school leader under the guidance and mentoring of other leaders. The residency serves as the final preparation stage after which the candidate is eligible to move into a school leader position.

Approaches to residencies taken by several CMOs include:

- YES Prep offers the Leading Excellence Fellowship, a one-year program that provides fellows with the opportunity to design their own individualized growth plans, participate in monthly seminars on pertinent topics, sit on committees related to their areas of interest, and complete “action projects” at multiple schools to help them improve their programs.<sup>53</sup>
- Green Dot’s one-year Administrator in Residence, or AIR, program allows candidates to intern in four different schools throughout the year and spend four days a week shadowing principals and completing school-based administrative assignments. On Fridays, AIRs work at Green Dot’s central office to provide support on special projects, prepare a portfolio of school leader resources, and meet with their cluster director to discuss project progress and weekly reflections.<sup>54</sup>
- Rocketship’s startup principal program requires candidates to complete a full-time, 12-month residency. Participants begin by attending the Execution in Entrepreneurial School Leadership summer institute, provided through a partnership between Inner-city Teaching Corps, an education nonprofit in Chicago,

and the Kellogg School of Management at Northwestern University. When they return, candidates spend the year engaged in three primary activities: leadership experiences (takeover weeks, coaching teachers); training and coaching (small group workshops, one-on-one coaching from principal on staff); and startup school activities (e.g., student recruitment, school planning, hiring). Other activities in which participants may engage include shadowing a principal, coaching a dean-in-training, or observing instructional activities.

- KIPP also offers a residency to its founding principals, those preparing to start up a new school, through the Fisher Fellowship Program. With a national cohort, participants complete intensive summer coursework before returning to KIPP schools to complete their residencies. The Fisher fellows spend 10 weeks placed in both KIPP and non-KIPP schools, interspersed with three professional development trainings that range from one to two weeks in length. Candidates also spend six months developing school design plans in the communities where they plan to open schools. Throughout the program, fellows receive feedback and coaching from leadership coaches and regional leaders.<sup>55</sup>

Historically, KIPP has not provided residency opportunities to successor principal candidates—those who plan to take over an established school. Successor principal candidates typically spend a year in training alongside their other regular duties; with the support of a federal Investing in Innovation, or i3, grant, however, KIPP will develop and implement a series of two-week apprenticeships in high-performing schools for these candidates.<sup>56</sup> Additionally, the grant will provide the opportunity for candidates to participate in an onsite review of the school for which they are targeted for leadership, in order to plan better for the top priorities during their first year.

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## Recruit teachers with high potential as leaders

Two of the CMOs we identified look for school leadership potential when recruiting and hiring teachers. During Rocketship’s hiring process, CMO leaders intentionally screen candidates using tasks that help them identify whether teachers have the key characteristics needed to be a school leader.<sup>57</sup> At YES Prep, when the CMO identifies candidates who might later be a good fit for an academic dean or school leadership position, it may hire them as a teacher or into a part-time, lower level of leadership, such as an instructional lead. Bill Durbin, head of new schools, explains, “It is a low-risk opportunity that brings

a high yield if they do well.”<sup>58</sup> Both of these strategies streamline the process for leadership selection when CMOs examine their bench for the next great principal because some of the teaching staff has already been identified to grow into that position.

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### Extend the reach of successful leaders

Many of the CMOs we identified find ways to extend the impact of their best leaders. They do this by promoting successful school-level leaders into central office, regional, or national managerial roles. YES Prep has found ways to extend the reach of their central office staff in order to grow. To address a growing demand in the community, YES Prep will open a new campus ahead of schedule this fall. In order to do so, Durbin is serving temporarily in two positions—head of new schools and co-school director at an existing school—while the former school director prepares to open a new school.<sup>59</sup> According to Durbin, “We are realigning our resources to accelerate growth and respond to the community.”

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### Make the job more manageable

Another strategy used by some of these CMOs involves making the job requirements for school leaders more manageable. By paring down, automating, or making more prescriptive the tasks required of new leaders, CMOs aim to increase the pool of candidates that can be successful in the position. Some CMOs have realized that while this strategy allows for slightly less autonomy for school leaders, it ultimately makes leaders more successful. In recent years KIPP recognized the vast array of skills required to be an effective principal severely limits those who might be successful in the position. According to former KIPP senior leader John Kanberg, “It was a point of perverse pride that [running a KIPP school] had to be a job only for Superman.”<sup>60</sup> KIPP’s original support structure for school leaders was also relatively laissez-faire, which led to some inconsistencies in school quality. Says Kanberg, “We had a ‘give-us-a-call, drop-us-a-line model,’ and it pretty quickly became clear that it wasn’t working.” Since that time the KIPP Foundation has begun to provide more direction and take some of the responsibilities off the plate of school leaders, such as by providing schools with an inventory of instructional toolkits, directly supporting principals with issues related to finances and school boards, and conducting school inspections to determine where schools and leaders need more support.<sup>61</sup>

IDEA has begun to support its leaders by providing more direction to schools as well. Torkelson, CEO, explains, “Relying on transformative leaders who can just ‘figure it out’ isn’t going to work; we can’t depend on superstars to support this kind of growth.” Providing school leaders with a more prescriptive curriculum, accompanied by data tools, training, and support, has allowed IDEA to be targeted in how it addresses issues and grows its leaders. Torkelson believes this approach has made principals more reliably successful. “The program model is helping people who would have been lower performers to be really solid, and the solid performers to be pretty darn good, he says.”<sup>62</sup>

# Meeting demand: Barriers and opportunities

In order to meet demand, better-performing charter schools and CMOs will need to grow rapidly, and they will need to ensure an adequate pipeline of great teachers and leaders to staff their schools. The CMOs that we identified differed somewhat in their certainty about whether the strategies they have in place to meet their human capital needs would be sufficient to keep pace with their growth plans. They, however, also varied greatly in their planned growth for the next five years, and some CMOs have slowed their growth in recent years, in part due to the economic recession.<sup>63</sup> Several of the CMOs' leaders admitted to cautious optimism and underscored the need for their organizations to increase their efforts around human capital significantly in the coming years.<sup>64</sup>

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## Potential barriers

Though CMOs have made great strides in their ability to staff their schools with great teachers and leaders, they still see significant barriers that may prevent them from achieving their human capital goals. These barriers include:

- Policy barriers
- Continuing shortage of great teachers and leaders
- Technical limitations
- Limited resources

We'll now explore each of these barriers in turn before looking at how CMOs typically overcome them.

## Policy barriers

CMOs mentioned state and federal policies that hinder CMOs from accessing talent to grow their schools. These include policies requiring CMOs to have teachers and leaders who are “highly qualified” under federal policies or obtain state certi-

fication. CMOs believe there are a large number of potential teachers and leaders who have the skills and competencies to be successful in their charter schools, but the current certification and licensure requirements narrow that pool significantly. Some CMOs have developed their own certification programs to help address this challenge. But not all have the capacity or desire to extend their operations in this direction and suffer from policies that cut them off from potential new talent.

### Continuing shortage of great teachers and leaders

Despite their efforts, CMOs have difficulty finding enough great teachers and leaders that fit within their organizational cultures. CMOs attributed this to a lack of good candidates entering the field and teachers and leaders being ill-prepared to work in their CMOs. In some areas, such as areas of high poverty, isolated communities, or economically depressed areas, the problem is even greater. These hard-to-staff communities may be less desirable places to live and may offer lower salaries. With smaller overall populations, the pool of education talent is even smaller than in more populous locales. CMOs working in these areas say they often struggle to staff their schools and they may have to rely on training ill-prepared or noncredentialed candidates.

### Technological limitations

One CMO—Rocketship—has moved toward using technology to supplant teachers' more rote and mundane tasks. The innovators at Rocketship have found, however, that despite great advances in technology and learning software in recent years, there are still significant limitations. Current applications, for example, are limited in their ability to extend classroom learning while adapting to a child's individual level of skill, within a teacher-defined range of topics. According to Kate Coxon, manager of individualized learning at Rocketship, "the software isn't quite there yet in some areas."<sup>65</sup>

### Limited resources

CMOs commented on the difficulty of developing a well-structured leadership pipeline with limited resources to devote to the process. While human capital pipelines are generally among their top priorities, CMOs try to direct the major-

ity of their available funds to the school level, which limits their ability to run in-house programs focused on future teacher and leadership development. Many rely on external philanthropic funding to support these programs, which may not provide the most sustainable funding source.

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## Promising opportunities

To meet human capital demands, CMOs in the study adopted a variety of innovative practices to ensure their schools were staffed by great teachers and leaders. Below we provide key innovations and lessons learned from the CMOs in our study. We also provide additional ideas to overcome remaining barriers and allow for next-generation efforts for growth. Let's examine a few more closely.

### Formalize processes and infrastructure

The CMOs we studied emphasized the importance of formalizing processes and investing in infrastructure to better recruit, onboard, and support teachers and leaders. They did this by first determining what worked well—such as looking for specific competencies when recruiting teachers and leaders and providing summer boot camps or residencies to ensure teachers are prepared—and then making those practices an institutionalized part of their programs.

Next-generation growth: Make customary the practice of selecting some candidates as teachers who have the long-term potential for becoming leaders. In the screening process, look at candidates for not only what they can provide in the near term as teachers but also as leaders in the long term. Intentionally include questions or activities that detect future leadership potential, including the sort of past-incident interviews that research shows are the best way to assess candidates' behavioral competencies correlated with later job success.<sup>66</sup> Once they are on the job, provide promising candidates with opportunities to grow these skills.

### Make the most of the people they attract

The CMOs we interviewed all use strategies to make the most of the best candidates they can find. They do this by providing additional training, narrowing the scope of responsibilities associated with the role of “teacher” and “principal”

to make the job more manageable, and extending the reach of the best teachers and leaders to serve more students.

**Next-generation growth:** Extend the reach even further by getting great teachers in front of more students. This may be done in a variety of ways. Schools could offer successful teachers larger classrooms, by choice, in exchange for proportionally enhanced pay. They could redesign teachers' roles and schedules to free up the best teachers' time and allow them to teach more students (taking noninstructional duties off their plate) or encourage teachers to specialize in particular areas of instruction and work with students who would most benefit (teachers who excel in math instruction teach only math, while another may teach only English). Additionally, schools could take advantage of technology-enabled resources to provide students with access to great teachers remotely. CMOs are already extending the reach of their best leaders to more students, as successful school-level leaders take on regional or national managerial roles. CMOs should do more in this regard, enabling great school leaders to open a second or third campus and thereby sidestep the need to find brand new fully ready leaders for every new school.<sup>67</sup>

### Import and induct management talent

All of the CMOs we studied have experience working with teachers prepared through nontraditional routes. Many of the CMOs have become adept at choosing teachers with great potential and providing resources and training to help them be successful.

**Next-generation growth:** Develop ways to import *leadership* talent from outside sectors. Though charter operators have been more successful with homegrown leaders, it is unlikely that the internal pipeline will be sufficiently large to fuel the kind of rapid, exponential growth needed to meet demand. In addition, like the founders of rapidly growing private-sector firms, operators of rapidly growing CMOs are likely to need a level of management talent within their central offices that goes beyond what many homegrown candidates can bring. To grow more rapidly while maintaining quality, the best and most innovative charter organizations need to identify ways to provide proven outside-sector leaders with the training and residency experiences that will make them successful in school leadership.<sup>68</sup>



# Conclusion

The growth of highly successful charter schools presents one of the nation's best opportunities to close achievement gaps and meet rising global standards. Finding the talent to fuel that growth—both teachers and leaders—presents a challenge that, if unaddressed, will leave that opportunity on the table.

Leading CMOs are currently tackling these challenges, and other CMOs would do well to examine their practices and build on them, rather than reinventing the wheel. At the same time, today's strategies are unlikely, by themselves, to get the job done. CMOs need to adopt next-generation approaches that catapult them to even higher levels of growth, with the potential to meet the high demand for better school options.

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**Public Impact** is a national education policy and management consulting firm based in Chapel Hill, N.C. We are a team of researchers, thought leaders, tool-builders, and on-the-ground consultants who help education leaders and policymakers improve student learning in K-12 education.

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## Acknowledgements

We are grateful to the following people for participating in interviews to complete this study: Zachary Levine, director of human capital, Green Dot Public Schools; Tom Torkelson, CEO, IDEA Public Schools; Larry Rosenstock, CEO, High Tech High; and Bill Durbin, head of new schools, YES Prep Public Schools. In addition, we are indebted to Bryan C. Hassel and Emily Ayscue Hassel of Public Impact for their guidance and feedback on our research and early drafts.

The Center for American Progress thanks The Eli and Edythe Broad Foundation for their sponsorship of this publication as well as their ongoing support of our education programs. The thoughts and opinions presented in this report are those of American Progress alone, and do not necessarily represent the opinions of the foundation.





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