



Grow Your School at Every Stage

THE CHARTER SCHOOL GROWTH GUIDE

Whether you're just beginning the process of starting up a charter school, looking to expand, or you're trying to prioritize your next steps, you've come to the right place.

In this guide, you'll find tips for you and your team on developing a strong charter, building culture and community support, and boosting your financing and practices to support your growth.

We are grateful for the wisdom offered by our vast network of charter school experts in the creation of this guide.

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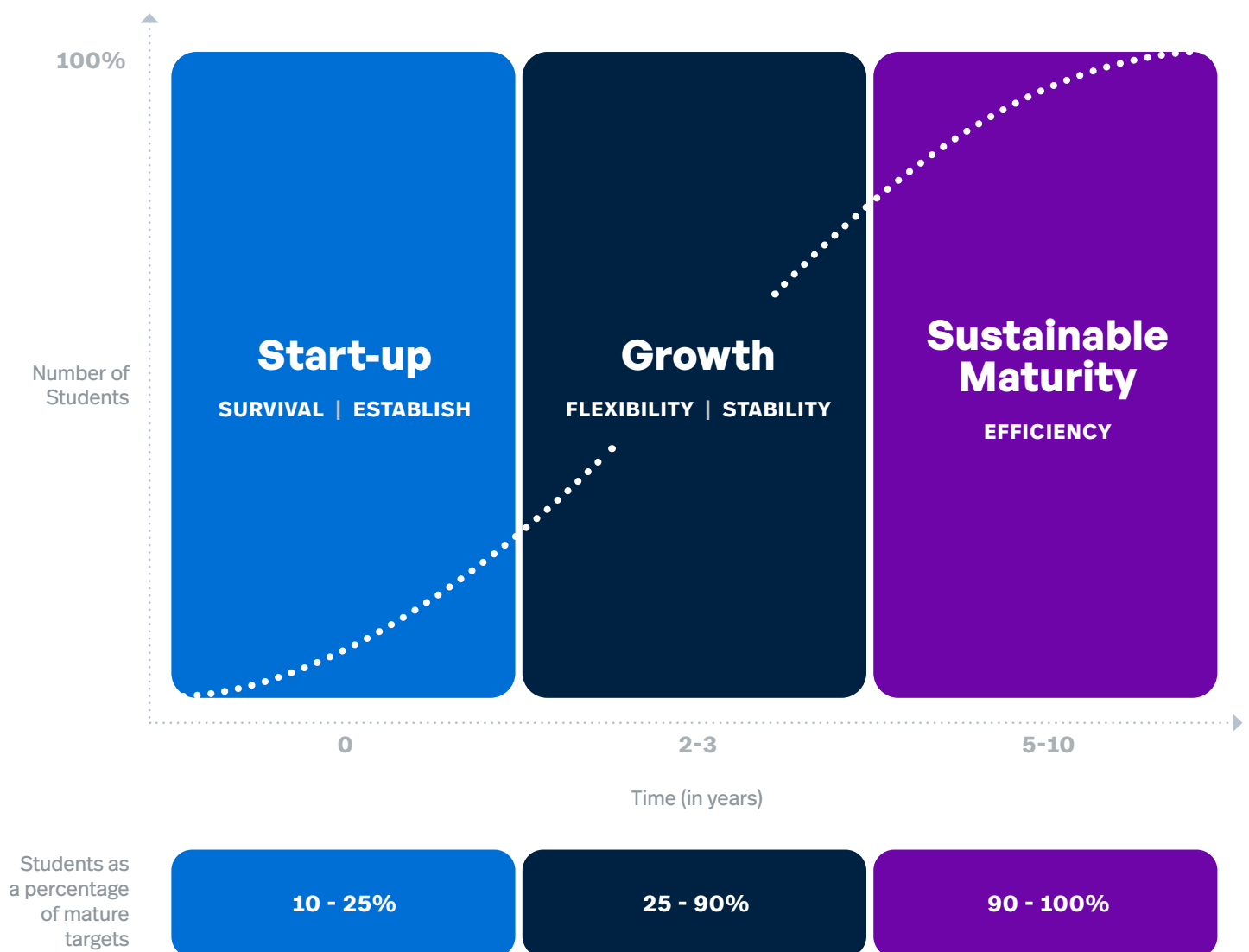


01

The Growth Stages of Charter Schools

The Growth Stages of Charter Schools

Charter schools tend to fall within three main growth stages: **start-up**, **growth**, and **sustainable maturity**. These stages are defined by years in operation and number of students served. Each phase presents unique challenges and best practices.



Why Charter Schools Close

Before we jump into proven strategies for charter school success, it's important to recognize why charter schools close. According to [The Center for Education Reform](#)¹, 66% of charter school closures are for financial reasons (42%) and mismanagement (24%). (By contrast, fewer than 20% closed due to academic issues.)

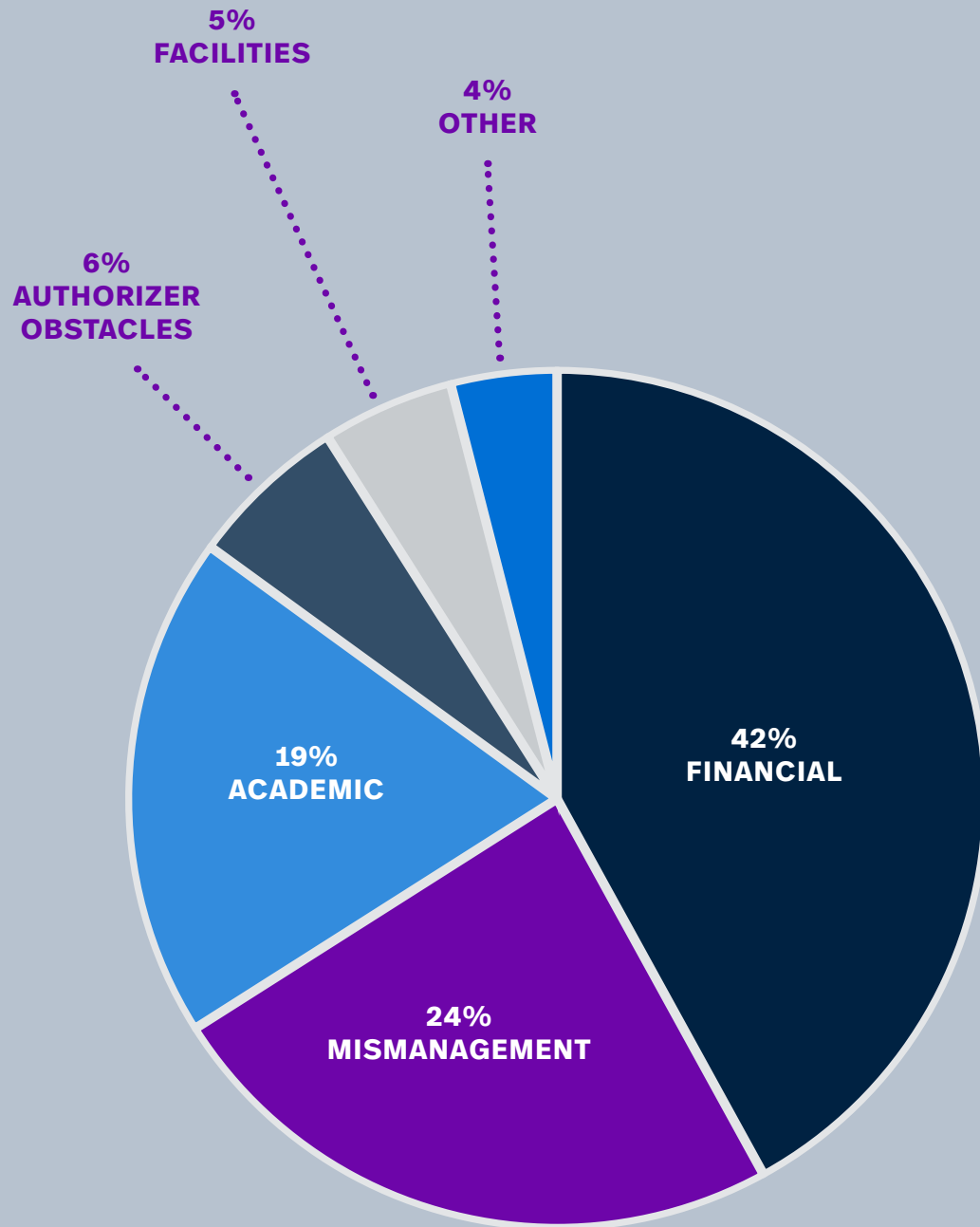
These numbers suggest that schools often close due to a lack of funds or because funds weren't managed well. **Another telling figure:** 87% of charter schools that closed did so in the first three years.

Charter school closure statistics can help guide your practices in the foundational years.

- 1 Focus on raising capital and managing it well.
- 2 Be highly strategic about your priorities in the first three years.



LEADING CAUSES FOR CHARTER SCHOOL CLOSURES



¹ The Center for Education Reform, *The State of Charter Schools: What We Know and What We Do Not*, December 2011, https://edreform.com/wp-content/uploads/2011/12/StateOfCharterSchools_CER_Dec2011-Web-1.pdf

02

The Start-up Phase

The Start-Up Phase

The start-up stage includes the very first tasks required to form a charter school: hiring, launching, and running until 10–25% of your target enrollment has been achieved. Without a doubt, this is the most challenging and stressful stage for charter school leaders.

If you're in this stage now and you're feeling overwhelmed, you're not alone.

As mentioned previously, 87% of charter schools that fail do so in the first three years, and making it past this stage is critical to long-term success. You must have a smart strategy, prioritize wisely, and form valuable partnerships as you help your students succeed academically.

BEST PRACTICE

The good news is that the charter school community is large and welcoming—you can draw on the expertise of other leaders (even your “competitors”) who have been where you are now.

THE GOAL

Survive, enroll students, get to know and get known by the community.



PRIMARY CHALLENGES

- **Securing financing beyond state funding**
- **Obtaining facilities**
- **Building community awareness, finding students**
- **Establishing an academic program**
- **Staffing to meet your school's demands**



Start-up Challenges & How to Conquer Them

These challenges are consistent among the vast majority of charter schools, regardless of location, population, and academic focus. If you find that you're spending a lot of time and energy on projects unrelated to these challenges, ask yourself if these activities are truly essential or if they are taking your time and resources away from necessary tasks.

CHALLENGE NO. 1

Securing Financing

Early on, you'll need more than funding—you'll need financing. Be as creative and diverse as possible as you seek donations, grants, and other financing options.

Submit applications for as many grants as you can, from public and private sources. The U.S. Department of Education [has a number of available charter school grants²](https://www2.ed.gov/about/offices/list/oii/csp/index.html), but be sure to look for state, local, and private foundation grants as well.

Build strong relationships with financiers and ask partners to write letters of support to demonstrate you have help with your cash flow.

Keep in mind that many grants are reimbursement grants, so you'll need separate capital to actually make the purchases and then submit your expenses for reimbursement. You may wait months or years to receive reimbursement from the grant.

BEST PRACTICE

Recruit a volunteer to your funding team with experience in grant writing. Use original responses and ensure that final submissions have a cohesive voice and answer any required questions.

BEST PRACTICE

For some grants, such as California's Public Charter Schools Grant Program, you can volunteer to be a grant reviewer as long as you're not submitting a grant application in that round. You'll learn the rubric and the metrics by which grants are evaluated; you'll have the opportunity to read many grant applications; and you'll learn the difference among applications that are outstanding, applications that are so-so, and applications that are a no-go.

² U.S. Department of Education, Charter School Grants, <https://www2.ed.gov/about/offices/list/oii/csp/index.html>

CHALLENGE NO. 2

Your School's Home

There's no way around it: finding a home for your school is tough. If you're just beginning the process, you likely aspire to own your school—this is a great goal, but it can be difficult to accomplish with so much else on your plate. For the short term, you may have to settle for a space that's less than ideal. Keep in mind that it's not permanent, and finding your school's long-term home will become easier once you're out of the start-up stage.

BEST PRACTICE

Remember that your first home is temporary and allows you to establish realistic criteria for your future home.

Many charter schools face the choice between leasing space from a private landlord or from the local school district. There are pros and cons to each, and every school will need to decide what's best for them.

In some states, such as California, there are laws that require local school districts with unused facilities to provide them to local charter schools. These buildings may be older and in less-than-ideal condition, but you can't beat the price—district-owned facilities may be free or come at a very low cost. This arrangement can be tricky since school districts typically compete with charter schools; it also means that the charter school isn't completely independent from the school district.



CHALLENGE NO. 3

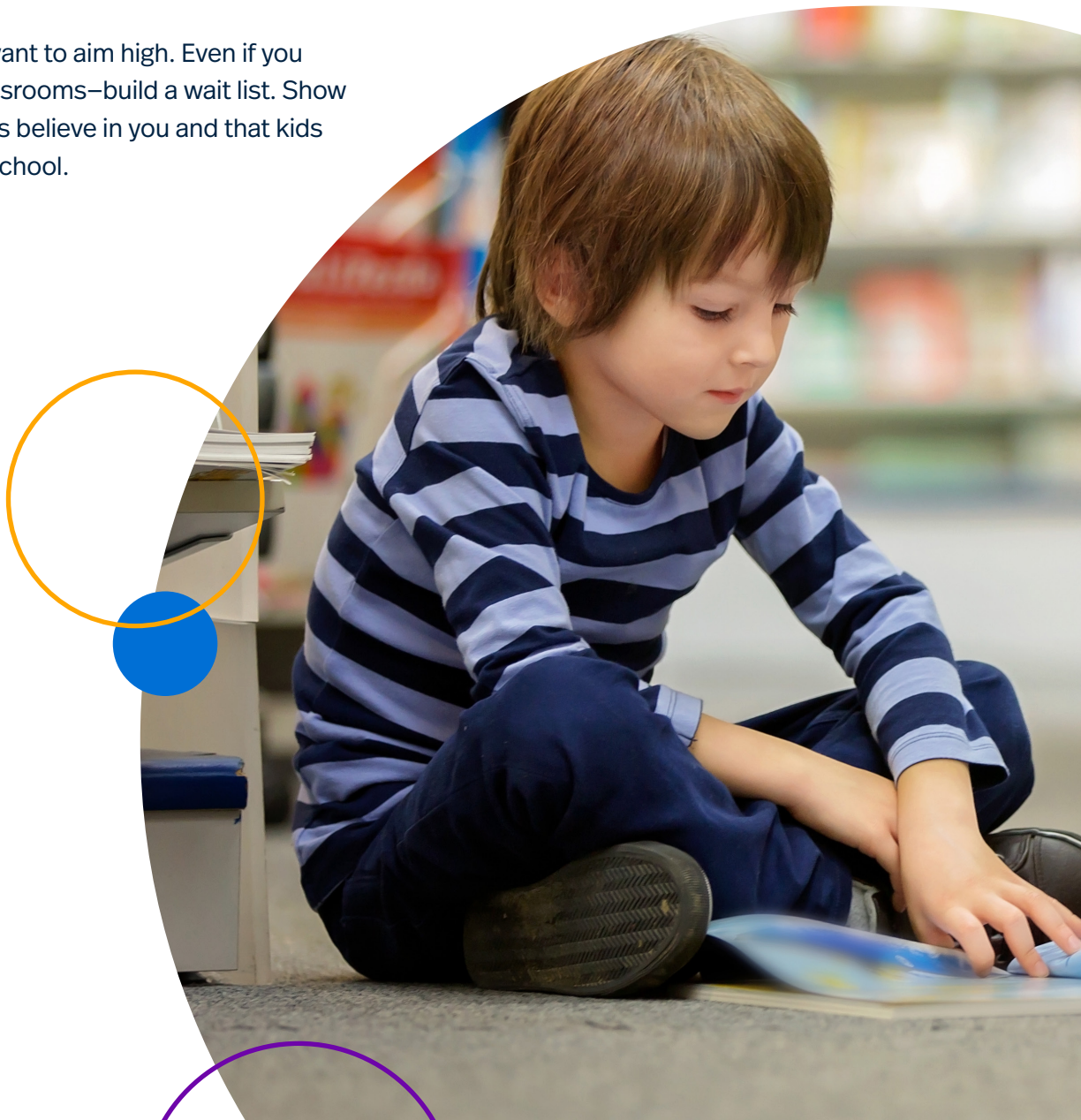
Community Awareness

Creating awareness of your school in your community is vital in the start-up stage. You'll be busy making friends and allies with business leaders, vendors, and community groups. Through enrollment marketing, fundraisers, and open houses, you'll share your mission with hundreds of families. You'll want to create a strategic plan for growing community support, including milestones and benchmarks. Don't start from scratch—tap into your founding team, community members, or volunteers who have marketing expertise.

Through it all, you'll want to aim high. Even if you have full, thriving classrooms—build a wait list. Show the world that families believe in you and that kids want to attend your school.

BEST PRACTICE

Connect with your local talk radio station. Host a show about education or students in the community.



Tips for Community Engagement

COMMUNITY EVENTS

Build a consistent presence at community events, such as farmer's markets, seasonal festivals, holiday parades, and cultural and arts events. This may include a table or a booth—but be creative; the goal is to stand out.

SOCIAL MEDIA

Social media is a great way to engage the community, but only if you have regular, engaging, and sustained updates. Draw on the expertise of a partner, founder, or volunteer who does this full-time.

INFORMATIONAL MEETINGS

Provide regularly scheduled informational meetings for families to learn about your mission and vision. If you don't yet have a school home, consider using meeting rooms at your district office or reserving free spaces at a library or community center. For more reach, you can provide webinars and in-person presentations at different times of day to cater to working families.

BUSINESS OUTREACH

It's never too early to build strong relationships with members of your business community. Be sure to reach out to the Chamber of Commerce and Rotary Clubs.

SCHOOL TOURS

Once you have a school, conduct frequent tours to show the public what they're supporting.

PUBLIC RELATIONS

Tell your story to anyone who will listen! Reach out to local news outlets, podcasts, bloggers, and well-connected community leaders. You'll build goodwill and reach families who may not have previously considered a charter school for their kids.



CHALLENGE NO. 4

Establishing Accountability for Your Academic Program & Tracking Metrics

For charter schools, academic accountability begins with the charter application itself.

Your application is a promise to future students, families, and the community. When your charter is granted, you'll need to report metrics on a regular basis to show that your school is fulfilling those promises and meeting the requirements set forth in your charter agreement—even before you have a baseline of standardized test scores and Adequate Yearly Progress measurements.

Certain metrics may be required by state standards—such as Common Core—but the authorizer will also want to see how well your students are tracking toward the accountability standards spelled out in the charter. To some extent, these will vary by school. For example, if your academic model is built around project-based learning or leadership, your school may track very different academic metrics than a school built around language immersion or STEM.

Accountability and metrics aren't just for your authorizer; be sure to share them widely and often with staff, families, and students. By establishing a diverse set of meaningful metrics from the beginning, you'll build a foundation for accountability that goes far beyond standardized test results as you grow.



BEST PRACTICE

Your school's plan for accountability is a reflection of how unique it is. Establishing academic rigor and describing the metrics you'll use to measure progress is required in the charter application. Differentiate your school from others here!

CHALLENGE NO. 5

Staffing

From the very beginning, it's important to find teachers and leaders who share your goals and values. You can use websites like **Edjoin** and **Indeed** to find potential candidates, and can also reach out to charter school associations for help.

In the early stages, you might decide to outsource functions like accounting, custodial work, and food services to established companies. Companies that provide these services are already experts at what they do, so outsourcing can be a great way to operate more efficiently in the first couple of years.

BEST PRACTICE

When you're submitting your charter school petition, make sure to get signatures from both teachers and families. This shows that you already have a committed team of educators on board.



Start-up Stage Opportunities for Growth

The start-up stage is exciting and full of potential. There will be mistakes along the way, but efficient course-correcting and learning from others can make all the difference. It's common to feel discouraged during this phase—read on to discover the growth opportunities that can be found within the challenges you might face.

OPPORTUNITY NO. 1

Establish Best Practices Early

You don't have to rely solely on your founding team to create best practices for your school—they already exist (and many can be found in this guide!) and you can put them to use right away. Put your founding team in charge of creating vision, forming partnerships and implementing best practices.

Connect with partners that can provide those best practices and share what other schools are doing. These can include practices on everything from fostering your school's culture, engaging families, building a curriculum, and providing the right kind of support for the students you serve. Also don't hesitate to reach out to established charter schools in your community—they have gained a wealth of knowledge from their experiences.

Best practices can come from the business community, too. Draw on the expertise of your legal team for governance, policies and contingency plans; back-office providers such as accounting firms for budgeting tools; charter

school associations for advice on things like staffing; and financing partners for fundraising and growth strategies.

Ask your founding team to read as many charter school petitions as they can, including those that were approved and those that were not. You'll start to notice patterns. For example, many successful petitions include letters of support from elected officials at every level. Reaching out to politicians for these letters is a great use of your founding team's time.

Reach out to local universities and schools of education for advice on your programming and petitions—this can also be a way to recruit academics to your founding team.

BEST PRACTICE

Be wise about crafting your founding team. Ensure that you include a variety of educators, parents, and community influencers with varying backgrounds and perspectives. Above all, make sure that the founding team shares a common vision for the school.

OPPORTUNITY NO. 2

When It Comes to Petition Approval, Your Strong Educational Program is Just One Piece of the Puzzle

There are several factors at least as important as your education program. Keep your petition short, but above all, you'll want to show that:

- 1 **You have a team that can implement your program.**
- 2 **You have the financing to carry it through.**
- 3 **You have a school building.**

It's a good idea to approach your authorizer before submitting the final petition. Start building those relationships well in advance so you can get feedback on your petition before formally submitting it. Be inspired by successful petitions but be sure to write your own; avoid the temptation to copy and paste!

BEST PRACTICE

Although several people may contribute to the petition, ensure that the final submission has a consistent, cohesive tone with one writing style. Avoid using too many acronyms or bureaucratic language.

Be sure to include pre-approval letters from financiers with the petition as well as letters of support from community leaders, elected officials, and academics.





OPPORTUNITY NO. 3

Build Community Support

You can have a great school with an innovative curriculum and the most dedicated staff in the world—but if nobody knows about it, enrollment will prove difficult. The ultimate goal is to have a wait list before you open your doors.

Here's where you can focus on building strong community support.

Ultimately, community support means more than having a strong turnout at authorization hearings, though that's important, too. It also means having strong relationships with business leaders, vendors, community groups, local media, and other charter schools. The previous section includes tips for engaging your community—anything you can do to share your story helps!

If all goes well, you'll be operating in your community for decades to come, and you'll need your neighbors behind you every step of the way—including well before it comes time for authorization hearings.

BEST PRACTICE

Consider speaking for free at events such as Rotary Club meetings and community groups—it's a great way to give back to the community as you create allies and position yourself as an expert.

Build relationships even with groups who may take a stance opposed to charter schools, such as teachers' unions. You can learn what it is they are resistant to, and strive to align your goals.

6 Start-up Tips from Experienced Charter School Leaders

The following tips come from charter leaders who have grown beyond the start-up stage.

1

STUDY AND MEET WITH SCHOOLS THAT ARE DOING THINGS WELL

How are other schools helping their students achieve academic success? Are there ways to adapt those tactics to your curriculum? You can learn a lot, and it's always a good idea to maintain positive relationships with other educators.

2

MASTER A FEW THINGS AND DO THEM REALLY WELL

Don't try to be a master of everything—it's impossible! Have a strong outline of the implementation plan proposed in the charter petition. What are your goals in the first few years? It's better to have a plan and be straightforward about incremental goals than to promise a lot of things you can't follow through on.

3

BUILD GENUINE AND ROBUST RELATIONSHIPS

With parents, teachers, leaders, vendors, and external constituents—have the intention to never, ever create an enemy. Always be honest and genuine, even with your detractors. Foster strong relationships with your vendors and with businesses that could become your vendors later on. You'll have emergencies and you'll need things you hadn't planned on in a hurry. Vendors will be more likely to come through in a pinch if they already feel personally connected with your school.

4

PAY EVEN CLOSER ATTENTION TO STUDENT PROGRESS DATA

Everyone will want to see the data, and you may not have much of it at the beginning. Think about the data you do have and how you can report it in the most compelling, meaningful way possible. In addition to the metrics you track to maintain your charter and to report to regulators, find out what's meaningful to parents and report that out: attendance, time-to-completion, classroom hours, pages read, math problems solved, miles run. Make sure to share the data with students, too.

5

PAY CLOSE ATTENTION TO THE BUDGET

As needs change and shift, review the budget and make sure it aligns with your goals. Always plan for the worst-case scenario and have a plan for dealing with cash flow issues. Build a solid relationship with your financial partners; treat your budget as a living document; and know how you'll pay for everything. Above all: never miss payroll.

6

DO NOT WAVER IN YOUR BELIEF OR YOUR MISSION

It's likely that you will encounter many people who will try to convince you to change your mission and vision to suit their specific needs. You can't please everyone! Your mission and vision should serve as your guideposts when you're faced with tough decisions; they shouldn't be the thing you modify every time you're faced with a tough decision.

03

The Growth Phase



The Growth Stage

Schools within 25-85% of target enrollment are typically within the growth stage. Unsurprisingly, the theme of the growth stage is constant change—your school will look entirely different at the beginning of this stage than it does at the end.

THE GOAL

Prove academic success while scaling up and staying flexible.



PRIMARY CHALLENGES

- **Delivering on your promise to your students and to the community**
- **Flexible financing**
- **Scalable facilities**
- **Proving academic efficacy and improvement**
- **Scalable operational support**



Growth Stage Challenges & How to Overcome Them

Many of the challenges of the growth stage are related to helping students succeed while scaling and staying flexible. This may sound easy enough, but the truth is, it's a challenge for most organizations to **stay flexible and resist entrenchment** as they grow.³ Flexibility has to be more than a mindset; it also has to be a component of a strategic plan and an aspect of your school culture.

CHALLENGE NO. 1

Proving Academic Efficacy and Student Improvement

The growth stage is all about advancing levels of student performance. Even if your approach to academics is highly individualized, use school-wide metrics to prove efficacy and show improvement. As described in the previous section, this is often required for schools to maintain their charters. If you established a system of academic accountability early on, you'll be able to show how well your program is working with a variety of relevant metrics that go well beyond standardized test scores. Adequate Yearly Progress and standardized test scores are important, but be sure to use other measurement tools to gauge your students' growth throughout the year.

Turn a critical eye to your materials—are there gaps? If something is missing, find creative ways to teach the lesson to your students so they don't fall behind the required curriculum.



BEST PRACTICE

Data is for everyone! Put your school's metrics front and center so parents, staff, and students can see them every day. This will raise awareness and help to share accountability.

³ Mulford B. (2005) Organizational Learning and Educational Change. In: Hargreaves A. (eds) Extending Educational Change. Springer, Dordrecht

CHALLENGE NO. 2

Finding Flexible Financing

Schools in the growth stage still need lots of financing options. Your financial needs will be different than they were in the start-up stage, and to some extent, they'll be harder to anticipate. After all, the financial needs of brand-new schools can be fairly predictable. But as you grow, your needs will change based on your school space requirements, your curriculum, and the number of students you have. Do you need a new gym? Are your students requesting more AP classes? Are you growing faster than you expected?

It's possible that you'll have sufficient funds from operating revenue to support a certain amount of expansion—but how much? The key is to match your capital to your operational needs, and obtain flexible streams of money.

It's likely that your school will need to continue to apply for grants, and if they are reimbursement grants, you'll need separate money for the initial expenditures: as described previously, reimbursement grants require the school to first make purchases and then submit the expenses for reimbursement—a process that can take months or years.

BEST PRACTICE

Consider your operational needs and the money you'll need to achieve them. Seek a variety of funding options, including grants, financing, and donations.





CHALLENGE NO. 3

Scalable Facilities

In the growth stage, many schools still haven't found the ideal home that can meet all their students' needs under one roof. For example, a school with classrooms in an office building may use a nearby public park for recess, a neighborhood community center for PE, and a private school's facility for music classes.

The configuration of each school will be different, but one thing is certain: your existing space will need to be expanded and upgraded as your academic program evolves and to meet parent and student expectations. Spaces used for art, engineering, music, and science all have specific requirements— and they can be absolutely crucial for attracting students and filling your classrooms.

BEST PRACTICE

Be open-minded and creative about your space. Many schools in the growth stage use a modular approach—they rely on a combination of locations for different programs.

CHALLENGE NO. 4

Delivering On Your Promise to the Community

Earlier, we recommended that schools in the start-up stage devote time and resources to creating allies and goodwill within the community. If you did everything right, leveraged marketing efforts, and had some luck, you may have even opened with a wait list. Now it's time to fulfill the promises you made to your community.

This means providing a great education for your students and fostering their academic success; it also means continuing to have a presence on social media, volunteering at community events, and speaking at Chamber of Commerce meetings. These are opportunities for you to share your students' successes as well as to continue to make allies.

BEST PRACTICE

Use every opportunity to share meaningful stories and demonstrate improvement through metrics. This will help you build goodwill in your community and spread your message.



CHALLENGE NO. 5

Scalable Operational Support

In the beginning, you may have outsourced certain functions, such as accounting, custodial support, and food service. You may also have used decentralized spreadsheets and documents to manage data and keep track of all the school's information. A patchwork of spreadsheets and vendors can quickly become tough to manage.

In the growth stage, most schools invest in more sophisticated systems and easier ways to manage and access data. It may still be financially wise to outsource certain functions, and you'll likely find that you have a combination of in-house and external operational support.

This [white paper \(PDF\) from the Great Lakes Center for Education Research and Practice](#) weighs the pros and cons of outsourcing.⁴

This [slide deck \(PDF\) from New York City Charter School Center](#) shows which functions can reliably be outsourced and which should stay in house.⁵

BEST PRACTICE

Use technology to become more efficient. Look for apps and tools that can automate repetitive tasks, save time for your staff, and create efficiency.



⁴ Mathis, WJ and Jimerson, L. A Guide to Contracting Out School Support Services: Good for the School? Good for the Community, Great Lakes Center for Education Research & Practice, https://greatlakescenter.org/docs/Policy_Briefs/Mathis_ContractingOut.pdf

⁵ Recruiting and Hiring Business Staff, New York City Charter School Center, http://www.nyccharterschools.org/sites/default/files/resources/recruiting_and_hiring_business_staff.pdf

Growth Stage Opportunities for Growth

Growth always leads to new challenges—many of which are valuable opportunities to learn and improve. Just as in the start-up stage, it's helpful to devote your efforts wisely and not repeat the mistakes of others who have come before you. Here are some opportunities you'll have in the growth stage.

OPPORTUNITY NO. 1

Embrace Change, Cling to Your Mission

Remember how we said the theme of the growth stage is constant change? The truth is that almost nothing can be taken for granted in the growth stage. For example, standardized tests can create curriculum changes, staff turnover and growing enrollment can lead to cultural shifts, and there is a learning curve to any new system or software. Try to embody the value of lifelong learning while maintaining high expectations and staying flexible.

As you grow, you may find that your culture, mission, and vision start to fade. The founding team that started the school likely aren't the people who are now running the school, and there may even be multiple locations in different cities.

Be strategic and proactive about keeping everyone connected and focused on the school's mission and vision.

BEST PRACTICE

Post your school's mission and vision prominently in every classroom. Have every staff member meet at set times throughout the year not only for professional development but also to reinforce the sense of professional community, mutual support, and culture.



OPPORTUNITY NO. 2

You Can Continually Adjust and Improve

Academic benchmarks are always changing—and so is your population of students and, to a certain extent, staff. Even if you arrive at what seems to be the most perfect academic program in one school year, it will need to be continually tuned and adjusted to keep up with curriculum requirements, help students succeed, and support improvements.

BEST PRACTICE

Review your school's data frequently and adjust your instruction based on the students.

OPPORTUNITY NO. 3

Professional Development

Professional development is a way of life for teachers, and at a charter school it should be a way of life for every staff member.

This is key for maintaining culture and building unity, as well as for creating job satisfaction and supporting continual academic improvement.

BEST PRACTICE

1

Gather together every staff member—from custodial staff to principals—for several days before school starts for some “sacred time” workshops: collaborative decision-making practice and to remind everyone of the school's history and culture.

2

Teacher retention is a top concern for many charter leaders. Expert Dr. Charlotte Pullins believes teachers stay if they are growing at your school, which means schools need to prioritize belonging, giving proper support, and taking care of the psychological needs of teachers. For more on teacher retention, check out the free webinar here: [Teacher Retention for 2023 & Beyond: How to Build a Lasting Relationship - Grow Schools](#)

4 Growth Tips from Experienced Charter School Leaders

The following tips come from charter leaders who have grown beyond the growth stage.

1

NURTURE YOUR SCHOOL'S CULTURE AS MUCH AS YOU NURTURE YOUR STUDENTS

Ultimately, culture is always a product of the people involved. It can be tough to retain quality leaders and teachers, especially because many charter schools have longer days and academic years than public schools. Teachers have to believe in the mission from the outset in order to put in those extra days and hours for years to come. It's essential that the people you hire are aligned with your mission.

2

PRIORITIZE CONTINUOUS PROFESSIONAL DEVELOPMENT AND LEADERSHIP TRAINING

In order to have motivated staff committed to continuous improvement, professional development has to be front and center. This is also an investment in continuity. When people feel like they are getting better at their jobs and have room for growth, they are more likely to stay.⁶

3

FOCUS ON PROVIDING INDIVIDUALIZED INSTRUCTION TO YOUR STUDENTS AND ON DATA ANALYSIS

These aren't contradictory! Every educator knows that one of the best ways to improve the data is to meet each student where they are and provide them with the support necessary to improve and succeed—regardless of your school's curriculum and goals. Of course, school-wide metrics are the best evidence that individualized instruction is working. Review the metrics frequently, share them widely, and make them everyone's responsibility.

4

DEVELOP SYSTEMS FOR YOUR OPERATIONS TO MAINTAIN CONSISTENCY AND EFFICIENCY

Researching, investing in, and mastering new systems is time consuming and expensive. The efficiencies you'll realize down the road will more than make up for the pain of adoption.

BEST PRACTICE

For the first few weeks of the school year, prioritize culture rather than instruction as you reestablish student routines and remind everyone of the school's values and mission.

⁶ Messmer, Max. "Four Keys to Improved Staff Retention," *Strategic Finance*; Montvale Vol. 88, Iss. 4, (Oct 2006): 13-14.



04

The Sustainable Maturity Phase

The Sustainable Maturity Stage

Schools that have reached sustainable maturity are at 90 - 100% of target enrollment. They are focused on improving academic programs and getting more efficient across the board, from accounting systems to recruitment processes. Sustainable schools have earned certain advantages: there are a consistent number of newly-enrolled students every year, most of whom are in the same gateway grade (e.g. kindergarten or sixth grade), and budgeting and financing are more predictable.

But of course, well-established schools still have challenges. Curriculum requirements are always changing and buildings will always need to be upgraded; staff will still need to be hired, and professional development prioritized. In this phase, it's important to be adaptable, budget-conscious, and to continue to think strategically about the future of your school.

THE GOAL

Reinvest for continual student improvement; expand to new locations.



PRIMARY CHALLENGES

- **Your students' continual academic improvement**
- **Finding the best rates on financing**
- **Attractive facilities**
- **Becoming part of the fabric of your community**



Maturity Stage Challenges & How to Overcome Them

Even if a school is operating successfully, the legislative environment, academic standards, and facilities will always be changing. There's no point at which you'll be 100% dialed-in. On the upside, you'll have the experiences, resources, and stability to reinvest in programs for your students and achieve longstanding goals.

CHALLENGE NO. 1

Your Students' Continual Academic Improvement

Your students' continual academic improvement is a goal without a finish line. That's the way it should be! Standards will always be changing, methodologies will continue to evolve, and students' and parents' expectations will change as well. But for schools in the mature phase, you're finally in the position to think about exceeding expectations, rather than filling the gaps. For the first time, most of your students will be returning, and you no longer have to focus on recruiting 30–40% more students each year. This frees up time and budget for new projects.

Is it time for a state-of-the-art science center? Or a first-class music program? Strategic investments in your school home and programs can distinguish your school, attract new families, and spur academic gains.

BEST PRACTICE

Effective professional development programs can go a long way toward keeping your staff motivated, enthused, and on the cutting edge of educational developments.

² U.S. Department of Education, Charter School Grants, <https://www2.ed.gov/about/offices/list/oii/csp/index.html>



CHALLENGE NO. 2

Finding the Best Rates on Financing

For charter schools that have attained sustainable maturity, some things do get easier—financing is one of them. Revisit your charter, consider your goals as a school, and be realistic. What major improvements could you realistically make at this point that would go the furthest toward helping your students' academic success? What do underwriters look for? What is a healthy balance sheet? What makes an organization a good investment?

The good news is that mature schools have lots of options for financing, so look at costs as the primary metric—which financial institution will offer you the best rates? Make lenders compete for your business.

BEST PRACTICE

No-strings-attached philanthropic donations are fantastic, but they're best for one-time purchases like a new auditorium or a ball field. For day-to-day operations, aim to rely exclusively on state and federal money.



CHALLENGE NO. 3

An Attractive, Affordable School Home

Many charter schools that have attained sustainable maturity choose to invest in their ideal home—a school with every program under one roof. Or maybe the benefits of your current location (e.g. convenient to public transportation, low costs) outweigh certain drawbacks (e.g. modular facilities, having the school district as a landlord). Either way, upgrading your home, furniture, and equipment is a great use of money for mature schools.

Whether you invest in a purpose-built school or in retrofitting another building, this will be a substantial financial outlay. But having an attractive, well-designed school is an excellent way to better serve students, attract new families to your school, and to continue to deliver on your promise to the community.

BEST PRACTICE

Remember the relationships you've built with business leaders in the start-up and growth phases? At this point, your partnerships and allies should be so strong that you'll have no trouble finding developers who will help with any upcoming expansion or construction projects.

Your school will be viewed as a reliable investment, and your leaders will be seen as trustworthy partners.





CHALLENGE NO. 4

Is it Time to Expand?

When your charter school becomes sustainable, there may come a time to decide whether to reinvest surplus funds into current programs or in new schools. What does scaling up look like to you and your team? Is it more important to provide all the bells and whistles for your current students, or to spread your mission, vision, and culture to many more students? There's no right answer, and there are tradeoffs either way.

BEST PRACTICE

Seek outside advice from experts. You'll want to weigh costs and opportunities surround questions such as:

- What is the cost of recruitment? (Do you have a waiting list?)
- What if you exceed the capacity of your facility?
- Will you need to hire more teachers or support staff?
- What are the financing costs associated with raising money?

Maturity Stage Opportunities for Growth

Even when you're fully established, there are always opportunities for growth and change, and challenges will continue to crop up. Here's what you can anticipate in the maturity stage.

OPPORTUNITY NO. 1

Strive for Continual Nurturing and Guidance

If you're in an earlier stage of growth, it can be tempting to assume that, at some point, everything will just work the way it's supposed to. The truth is, every school needs constant nurturing and guidance, no matter how mature and established.

On the finance side, budget and cash-flow will need to be monitored; teachers will need to be hired; and unexpected expenses will occur. Automate bookkeeping tasks whenever possible, but make a point to review finances on a regular schedule.



BEST PRACTICE

If raising the bar every year begins to feel exhausting or repetitive, consider devoting an academic year to a certain theme, for example, a school value such as empathy or courage.

Use the theme to guide culture, academic, and professional growth programs for both students and staff throughout the year.

OPPORTUNITY NO. 2

Time to Decide How to Invest in Your School

Your school will always be faced with tough financial choices: whether to reinvest in existing programs for current students or start new schools to serve hundreds more students; whether to invest in a playground or a gym; whether to upgrade computers or classroom furniture.

Ask students, staff, and families what they'd like to see and consider the wider needs of the community. Would a playground be a great addition to the neighborhood at large? Could a new auditorium be used for charitable events or after-hours classes for adults? Being a good neighbor is an effective way to spread your message and continue to be part of the fabric of your community.

OPPORTUNITY NO. 3

New Kinds of Challenges

Even though a mature school has certain advantages over schools in the start-up and growth stages, that doesn't mean it faces fewer challenges. Instead, the challenges change.

Chief among them are organizational entrenchment and having an effective, motivated team that continually embodies your school's values.

Don't rely solely on the hiring process to produce a great team. Take responsibility for shaping high-quality instructors in order to facilitate the school's continued growth. For example, pair newer teachers or those new to the team with veteran teachers in order to create strong relationships. This will help ensure that every teacher embodies your school's values.

BEST PRACTICE

Consider this: What does a sustainable school look like in terms of academics, operations and financing? Create long-term goals, then work backward. If you can't answer that question right now, enlist your team to work through it together. Not only will you create goals to work toward, you'll also create a framework for financial priorities in the coming years.

BEST PRACTICE

Make sure to build problem-solving time into your strategic plan for each academic year. Rehashing issues at staff meetings doesn't cut it.

Adapt an existing framework for resolving conflicts and making decisions, make sure everyone understands the ground rules and has a chance to be heard, and explain the rationale behind the ultimate decision, including pros and cons.

⁷ A decision-making framework that can be adapted for your school. "Decision-Making Frameworks," An Ethics Primer, <https://www.nwabr.org/sites/default/files/DMF.pdf>

OPPORTUNITY NO. 4

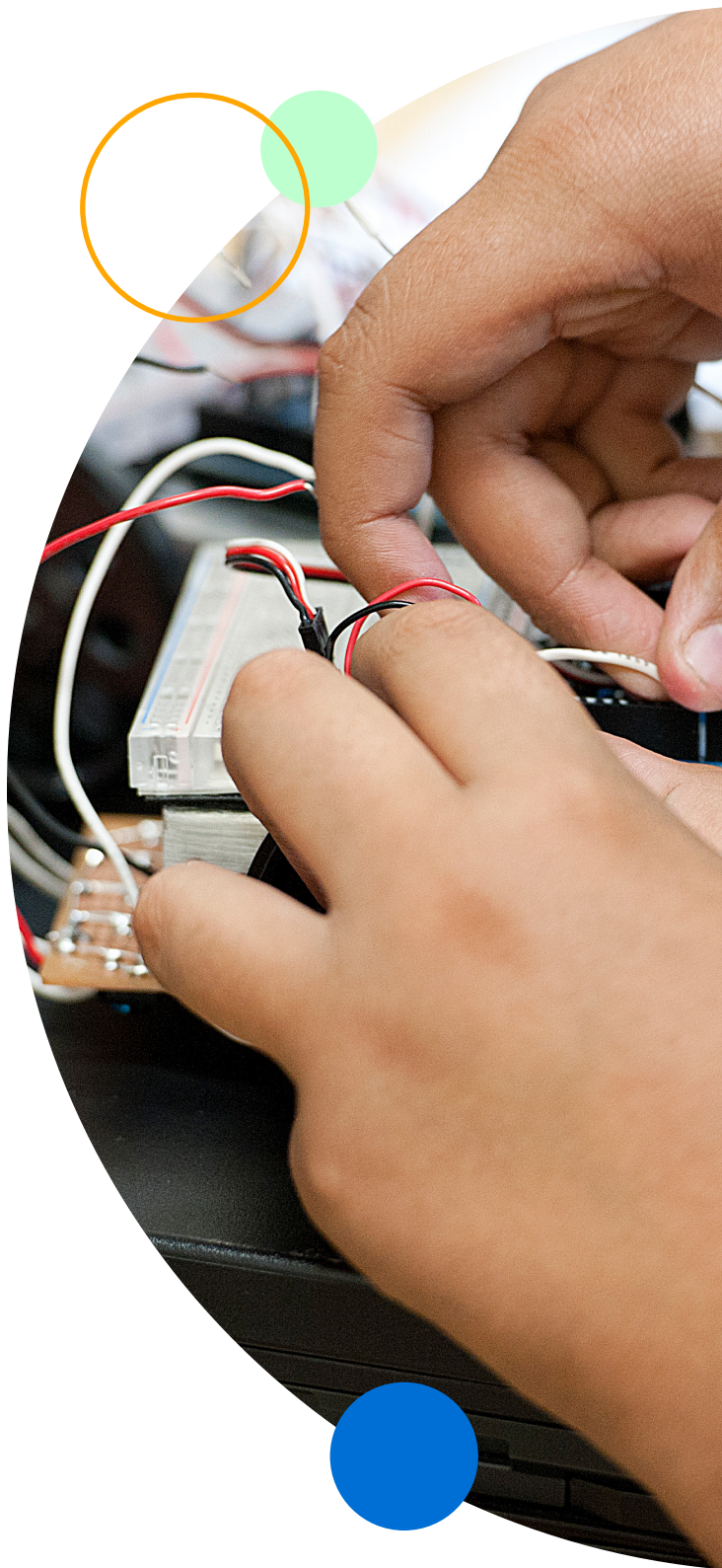
Becoming Part of the Fabric of Your Community

A mature charter school now has the opportunity to become a cornerstone and leader in business, arts, and civic organizations. How can your students play a prominent role in the community? Think about school-wide volunteer days, food and clothing drives, or hosting a talent show. You'll want to choose events that showcase your students and raises funds for a local community—and generates positive local media coverage. How can you position your staff as community leaders in addition to expert educators? Can teachers present at local meetings or conferences? If your school has extracurricular clubs, how can they give back to the community? Volunteering is a great way to demonstrate your values as a school and to authentically share your story.

OPPORTUNITY NO. 5

Is it Time to Expand?

When your charter school becomes sustainable, there may come a time to decide whether to reinvest surplus funds into current programs or in new schools. What does scaling up look like to you and your team? Is it more important to provide improve your programs for your current students, or to spread your mission, vision, and culture to many more students? There's no right answer, and there are tradeoffs either way.



6 Sustainability Tips from Experienced Charter School Leaders

1

BE MINDFUL OF PIVOTAL MOMENTS

An active board member retires, a storm renders three classrooms unusable, a well-loved teacher passes away, you establish and staff a brand-new language department. Whether positive or negative, it's impossible to predict every circumstance that can disrupt a school's operational rhythm and culture. The important thing is to acknowledge the disruption when it occurs and to have a plan to maintain operational and cultural continuity for your students no matter what.

2

STRATEGIC ENROLLMENT = STABILITY

Mature-stage schools are past the point of increasing enrollment by 30–40% every year, and that's great news. But remember: Strategically increasing enrollment can be an effective way to ensure financial and operational stability. If you have staff and space in your facility, weigh the financial costs and benefits of recruiting a small number of students to every grade, in addition to the incoming class of kindergartners, sixth graders, or ninth graders.

3

CONTINUE TO CULTIVATE A DATA-DRIVEN CULTURE

Ensure that everyone, including students and families, knows the goals for the academic year and can access school-wide metrics whenever they like. Keeping the goals and the metrics top of mind will help to keep everyone focused and let you know if you're meeting key benchmarks along the way.

4

CELEBRATE YOUR SUCCESSES AND VIEW YOUR FAILURES AS STRATEGIC OPPORTUNITIES

Celebrate every goal that's achieved, award that's won, and staff member that receives recognition. But look at the failures, too. That's where your opportunities for improvement lie. Analyzing failures can be a great way to begin next year's strategic plan.

5

DEVELOP PILLARS THAT DEFINE THE CULTURE THAT YOU WANT TO HAVE

On some level, culture is always aspirational—and that's good. Look back at your charter; have you fulfilled the promises you made at the outset? Where do you want your culture to be in ten years? Sit down with your team and think about the values at the core of who you are now and who you want to be in the future. Choose four or five pillars so students and staff can remember them, and give public recognition to any individual who goes out of their way to embody a value.

6

ASSESS ALL MANAGEMENT SYSTEMS REGULARLY

We've all been there—using a billing system that makes you grit your teeth or sitting through half a dozen interviews with unqualified candidates. At any school there will be frustrations on occasion, but schedule time to review and replace faulty and time-wasting systems whenever possible.

You can get the money, resources, and know-how to create a thriving school.

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