center on : reinventing : public education

Managing Talent for School Coherence:

Learning from Charter Management Organizations

Michael DeArmond, Betheny Gross,
Melissa Bowen, Allison Demeritt, and Robin Lake

May 2012

Center on Reinventing Public Education

Improving education through transformative, evidence-based ideas

The Center on Reinventing Public Education (CRPE) is a policy research group dedicated to finding innovative, effective ways to transform our education system so that all students—especially disadvantaged children in urban districts—have equal access to quality public education. For two decades, CRPE has identified systemic and emerging problems in public education and offered evidence-based solutions informed by rigorous research and balanced analysis.

CRPE analyzes K-12 issues ranging from school choice and charter schools to finance, productivity, and leadership. Our work values evidence over posture and addresses hard truths head on. We search outside the traditional boundaries of education to find pragmatic, equitable, and promising approaches to address the complex challenges facing public education.

CONTENTS

ACKNOWLEDGMENTS

INTRODUCTION:
MANAGING TALENT FOR SCHOOL COHERENCE

Recent studies leave no doubt about how important teachers are to student learning.[1] Some researchers even argue that having a string of highly effective teachers in elementary school can actually make up for the adverse effect poverty has on student achievement.[2]

At the same time, other studies show that school districts often do little to strategically hire and keep talented teachers. Worse, some of their practices actively stand in the way of building a great teaching corps, including making job offers late in the summer, assigning teachers to schools based on seniority, spreading responsibility for important talent management activities across unconnected central office units, and using superficial hiring and evaluation methods.[3]

These two facts—the importance of teachers and the inadequacy of traditional staffing systems—have prompted leaders in districts across the country to rethink how they manage talent. In places like Washington, D.C., Pittsburgh, Denver, and elsewhere, leaders are transforming personnel systems that were long driven by compliance and regulatory concerns into systems that take a more strategic and performance-based approach to talent management.[4] From the introduction of new sources of teachers and training to fundamental reforms in teacher evaluation and compensation, these initiatives are a potentially game-changing opportunity to test new human capital strategies that aim to ensure that all public school students have great teachers.

---

1.   See Dan Goldhaber, Dominic Brewer, and Deborah Anderson, "A Three-Way Error Components Analysis of Educational Productivity," *Education Economics* 7, no. 3 (December 1999): 199–208; Eric Hanushek, "The Trade-Off Between Child Quantity and Quality," *Journal of Political Economy* 100, no. 11 (1992): 84–117; Steven Rivkin, Eric Hanushek, and John Kain, "Teachers, Schools, and Academic Achievement," *Econometrica* 73, no. 2 (March 2005): 417–458.

2.   Rivkin, Hanushek, and Kain "Teachers, Schools, and Academic Achievement."

3.   See Jessica Levin and Meredith Quinn, *Missed Opportunities: How We Keep High-Quality Teachers Out of Urban Classrooms* (New York, NY: The New Teacher Project, September 12, 2003); Jessica Levin, Jennifer Mulher, and Joan Schunck, *Unintended Consequences: The Case for Reforming the Staffing Rules in Urban Teachers Union Contracts* (New York, NY: The New Teacher Project, November 8, 2005); Ronald Rebore, *Human Resources Administration in Education: A Management Approach*, 9th ed. (Upper Saddle River, NJ: Prentice Hall, 2010); Mark Smylie, Debra Miretzky, and Pamela Konkol, "Rethinking Teacher Workforce Development: A Strategic Human Resource Management Perspective," *Yearbook of the National Society for the Study of Education* 103, Issue 1 (2004): 34–69; Edward Liu and Susan Moore Johnson, "New Teachers' Experiences of Hiring: Late, Rushed, and Information-Poor," *Educational Administration Quarterly* 42, no. 3 (August 1, 2006): 324–360; Daniel Weisberg et al., *The Widget Effect: Our National Failure to Acknowledge and Act on Differences in Teacher Effectiveness* (New York, NY: The New Teacher Project, July 28, 2009).

4.   For example, see Allan Odden, *Strategic Management of Human Capital: Improving Instructional Practice and Student Learning in Schools* (New York, NY: Routledge, 2011); Rachel Curtis and Judy Wurtzel, *Teaching Talent: A Visionary Framework for Human Capital in Education* (Cambridge, MA: Harvard Education Press, 2010); Smylie, Miretzky, and Konkol, "Rethinking Teacher Workforce Development."

When reform-minded education leaders, policymakers, and advocates talk about these new talent-focused initiatives, they often talk about teacher effectiveness as if it is an attribute of individual teachers. They tend to frame teachers as simply being more effective or less effective, and call on districts to reward and retain the best and develop or dismiss the worst.

But research on both schools and organizations outside of education shows that performance, job satisfaction, and retention are not just a matter of an individual's characteristics.[5] These and other important outcomes also depend on matching the right people to the right organizations and providing the right working environments.[6] Effective teaching, in other words, is not just a product of teachers, but also of their relationship to the places in which they work.

This straightforward and intuitive point suggests that as reformers continue to push public education away from compliance-driven human resource policies and toward performance-driven approaches, they need to ask not only how to hire and reward effective teachers, but also how to build talent management systems that get the right teachers in the right schools and create coherent work environments that develop and support teachers' performance.

Charter management organizations (CMOs) offer an important but overlooked source of ideas for thinking about this question. CMOs are nonprofit organizations that directly manage groups of charter schools. In many cases, CMOs are building systemwide structures designed to support coherent, mission-driven schools at scale. Prior studies show that CMOs, like stand-alone charter schools, place a premium on finding the right teachers and building purposeful working environments.[7] This report asks how CMOs do that. How do they manage teacher talent for coherence?

---

5. For example, see Anthony Bryk and Barbara Schneider, *Trust in Schools: A Core Resource for Improvement* (New York: Russell Sage Foundation, 2002); Fred Newmann, Bruce King, and Mark Rigdon, "Accountability and School Performance: Implications From Restructuring Schools," *Harvard Educational Review* 67, no. 1 (1997): 41–75; Daniel Cable and Timothy Judge, "Person–Organization Fit, Job Choice Decisions, and Organizational Entry," *Organizational Behavior and Human Decision Processes* 67, no. 3 (1996): 294–311; Jennifer Chatman, "Matching People and Organizations: Selection and Socialization in Public Accounting Firms," *Administrative Science Quarterly* 36 (1991); Sara Rynes, Robert Bretz, and Barry Gerhart, "The Importance of Recruitment in Job Choice: A Different Way of Looking," *Personnel Psychology* 44, no. 3; (December 7, 2006): 487–521; Brian Hoffman and David Woehr, "A Quantitative Review of the Relationship Between Person-Organization Fit and Behavioral Outcomes," *Journal of Vocational Behavior* 68, no. 3 (2006): 389–399; Brian Gregory, M. David Albritton, and Talai Osmonbekov, "The Mediating Role of Psychological Empowerment on the Relationship Between P-O Fit, Job Satisfaction, and In-Role Performance," *Journal of Business and Psychology* 25, no. 4 (2010): 639–647.

6. Ruth Chung Wei et al., *Professional Learning in the Learning Profession: A Status Report on Teacher Development in the US and Abroad* (Dallas, TX: National Staff Development Council, 2009); Fred Newmann, BetsAnn Smith, Elaine Allensworth, and Anthony Bryk, "Instructional Program Coherence: What It Is and Why It Should Guide School Improvement Policy," *Educational Evaluation and Policy Analysis* 23, no. 4, (January 1, 2001): 297–321.

7. Robin Lake et al., *The National Study of Charter Management Organization (CMO) Effectiveness: Report on Interim Findings* (Seattle, WA: Center on Reinventing Public Education and Mathematica Policy Research, 2010); Betheny Gross and Michael DeArmond, "Investing in Selection: Hiring Teachers in Charter Schools," presented at the Association for Education Finance and Policy annual conference, Seattle, WA, 2011; Katherine Merseth et al., *Inside Urban Charter Schools: Promising Practices and Strategies in Five High-Performing Schools* (Cambridge, MA: Harvard Education Press, 2009).

To answer this question, the report relies on data from a larger study of CMOs conducted jointly by researchers at Mathematica Policy Research and the Center on Reinventing Public Education (CRPE). Although not focused specifically on talent management, the Mathematica-CRPE study includes a rich array of data on how CMOs manage teachers, including in-depth case study data as well as survey data from CMO central offices and principals (see Project Overview).[8]

We did not approach this report intending to represent the way that all CMOs—or even the best CMOs—manage talent for coherence. (Indeed, no two CMOs in the study approached talent management in exactly the same way.) Instead, our purpose is to highlight some of the broad ways in which the CMOs in the Mathematica-CRPE study recruited, hired, developed, and rewarded teachers while putting organizational coherence first.

What do we mean by coherence? In some cases the CMOs in the study focused on instructional coherence, a concept that has a long history in educational research.[9] That is, they focused on managing talent in support of a particular instructional framework or approach. In other cases, CMOs focused on a broader cultural coherence. They managed talent in such a way as to build common beliefs and attitudes toward student potential or expectations around adults' work effort. Of course, these two approaches are not mutually exclusive; they are often connected (although some CMOs appeared to stress one more than the other). Regardless of their specific focus, we found that CMOs generally managed talent for coherence in three main ways:

- **By recruiting and hiring for fit.** CMOs often narrowed the pool of possible teachers to people they believed would be best suited to their organizations. They did this by targeting particular sources of teachers and by using focused recruitment messages. Honestly communicating the CMO's particular cultural and instructional approaches during recruitment, for example, might ward off candidates unlikely to commit to those approaches.

- **By providing intensive and ongoing socialization on the job.** The CMOs were continually socializing teachers toward their goals and strategies. They did this in large part by insisting that leaders and teachers watch each other work and constantly share information about schools' expectations and how people were performing.

---

8.   Lake et al., *The National Study of Charter Management Organization (CMO) Effectiveness*; Joshua Furgeson et al., *Charter-School Management Organizations: Diverse Strategies and Diverse Student Impacts* (Princeton, NJ: Mathematic Policy Research and Center on Reinventing Public Education, 2012).

9.   Fred Newmann, *Authentic Achievement: Restructuring Schools for Intellectual Quality* (San Francisco, CA: Jossey-Bass Publishers, 1996).

- **By aligning pay and career advancement opportunities to organizational goals.** In many cases CMOs offered opportunities for exceptional teachers to work as coaches or other types of staff developers or to start new schools. When CMOs used these and other rewards to promote alignment, they often relied on the professional judgment of leaders more than on hard-and-fast performance metrics or assessments.

Together, these three broad practices appear to contribute to coherence in CMOs by helping to create and reinforce a common understanding of the organizations' goals and strategies. Collectively, they send messages to teachers about what is unique about the organization, socialize them to that uniqueness, and reward those who exemplify it. For top CMO leaders, these strategies were key levers for successfully achieving their goals. The degree to which these practices actually produce more coherent organizations or, for that matter, lead to better outcomes for students is beyond the scope of this report; nevertheless, we believe they offer some useful clues for thinking about how schools and districts might do more to manage talent for coherence. The rest of the report describes how CMOs used these levers: recruiting and selecting for fit, creating common expectations and purpose on the job, and providing opportunities for career advancement. The report ends with a discussion of what these findings imply for traditional school districts and the current wave of talent management reform.

Project Overview

This report relies on data that was collected as part of the National Study of Charter Management Organization Effectiveness conducted by Mathematica Policy Research and the Center on Reinventing Public Education between 2009 and 2012. These data include interviews with 142 leaders and teachers in 10 CMOs and 20 associated schools, a survey of 37 CMO central offices, and a survey of 221 principals who worked within these CMOs.

For this report, we had three questions in mind:

- How do CMOs recruit and hire teachers?
- How do they develop teachers on the job?
- How do they manage teacher performance?

Seeking answers, we reviewed interview transcripts, case study reports, survey data, and documents from CMOs and affiliated schools. All of these sources were valuable, but this report relies most heavily on data from the interviews, in which teachers and principals described their organizations' management systems and what they meant for their work. For more details on the case study and survey samples, data collection, and the types of analyses we conducted for this report, see the Appendix.

RECRUITING AND SELECTING FOR FIT

The case study data from the 10 CMOs in the Mathematica-CRPE study suggest that the CMOs approached recruitment and selection with the goal of hiring mission-driven people they believed would fit their schools and programs. Some CMOs were looking for teachers with particular skills and instructional knowledge; others were looking for teachers with a particular attitude or work ethic—a cultural fit. In the next sections we illustrate how the CMOs narrowed the pool of possible teachers in two ways: by targeting particular sources of teachers and by using focused recruitment messages.

Knowing Where to Look: Targeting Particular Sources of Teachers

Research outside of education suggests that a host of performance and employment outcomes depend on hiring employees based on how well they will fit the job and the organization.[10] But school districts rarely do anything during the recruitment process to directly promote good matches between teaching candidates and schools. The CMOs we analyzed, by contrast, prioritized the recruitment of candidates who they believed would fit their organizational mission and work culture. They did this by relying mainly on centralized recruitment strategies that capitalized on each CMO's scale and influence in the labor market and helped ensure that candidates got a coherent message about the organization.

To begin with, central office personnel in the CMOs focused their recruitment efforts on identifying particular training programs that they believed produced teachers with the attitudes, skills, and knowledge they wanted. The CMOs often built formal relationships with these programs and focused on these sources when they screened and selected candidates. These partnerships included a range of talent pipelines; some lay outside of traditional teacher preparation programs, but others were subsets of traditional sources, such as candidates from a particular preparation program. Regardless of where they looked, the CMOs tried to recruit from places that they believed signaled that an applicant was likely (though by no means guaranteed) to fit their culture and mission.

---

10. See Cable and Judge, "Person–Organization Fit, Job Choice Decisions, and Organizational Entry"; Chatman, "Matching People and Organizations"; Rynes, Bretz, and Gerhart, "The Importance of Recruitment in Job Choice"; Hoffman and Woehr, "A Quantitative Review of the Relationship"; Gregory, Albritton, and Osmonbekov, "The Mediating Role of Psychological Empowerment."

The most common nontraditional pipeline used by the CMOs was Teach for America (TFA), the well-known education nonprofit that recruits recent college graduates to teach for two years in urban and rural communities throughout the United States. CMOs that recruited heavily from TFA said that they sought out TFA teachers because they fit their organizational work culture. TFA emphasizes self-reflection, one CMO leader pointed out, and so does his organization. So TFA recruits were well-suited to the CMO's expectation that teachers regularly critique their own and their colleagues' work and adapt their practice accordingly.

Other CMO leaders said that TFA's "locus of control" concept—the idea that teachers should focus relentlessly on what they can do to improve student achievement, rather than perseverate on the challenges associated with student poverty—was an especially good fit for their mission. One CEO went so far as to say, "You take TFA out of the equation, and no one [in the CMO sector] would be able to grow as much as they are or want to, because it'd be much harder to find the type of teachers we want."

Not all, or even most, of the CMOs in the study recruited mainly from TFA, however. According to case study and survey data, CMOs found their teachers from a mix of sources. Data from CMO central offices show that about 60 percent of teachers came from traditional sources, and 40 percent came from nontraditional ones (see Table 1).

Table 1. CMO teachers come from a variety of sources

Teacher Hiring Source	Sources of CMO Teachers
Traditional education programs	29%
Local district schools	28%
Teach for America/New Teacher Project/Teaching Fellows	18%
Other charter schools	10%
Private or parochial schools	5%
Other source	10%

SOURCE: CMO central office survey, 2009.

Even when CMOs hired teachers from more traditional sources, they focused specifically on those institutions they believed were producing the best teachers for their schools. One CMO leader in an area without Teach for America said that the CMO develops relationships with faculty in local teacher preparation programs in order to identify students who would make the best possible local candidates for their organization. "We just kind of cherry-pick, to be honest," explained one of the CMO's administrators. One of the leaders in this CMO was also an instructor in the local preparation program, a position that allowed her to get to know potential candidates and talk to them about what it was like to work at her CMO.

A different CMO focused on recruiting recent graduates from specific local liberal arts colleges, because the CMO leaders believed they were a good fit for their program, which was generally organized around a Western canon curriculum similar to what they studied in college. Finding people who had the right vision was a critical issue for this CMO. "Very few people really think that what kids should be getting is [our curriculum]," the CMO's chief academic officer said. Graduates from particular colleges "don't need any convincing about the value of [our program]," the official said; they don't "need to be fixed" to believe in it, in contrast to graduates from traditional teacher education programs.

Whether recruiting liberal arts graduates, graduates from particular teacher education programs, or TFA corps members, the case study CMOs took a proactive and targeted approach to recruitment to find teachers who they believed would fit their schools.

Telling It Like It Is: Using Focused Recruitment Messages

The second way the CMOs narrowed the applicant pool was by using recruitment messages that conveyed a realistic picture of the difficulty of the job but also a strong message about their organizations' mission and values. Together, these messages helped candidates self-select into the application process based on their commitment to meeting the demands and aspirations of the CMOs.

Several CMOs said they used recruitment messages that specifically highlighted the difficulty of teaching in their organizations. As one CEO said,

> *We want to be real upfront . . . it was really important for us to really get all that on paper, so we could present that to teachers and say 'Look, we want to be very*

clear that these are the demands of the job.' . . . We've got a job description, and it's a couple of pages, and our handbook, and we present that to any candidates, just making sure that they're okay with everything on it before they sign up.

A teacher at a different CMO said that she wanted job applicants to know that the CMO prioritized student outcomes over the needs and interests of its teachers. "I tell them that they're coming to a place that cares about kids," she said. "And we care about adults too, but our adults are second. And I always tell them that. So, you know, kids are first." Another CMO used an online application process both to expose applicants to the CMO's program and what it demands of teachers, and to screen out applicants who were not internet-savvy.

Realistic job messages were not always about the difficulty of the work. They could also be about the specific instructional strategies that the CMOs expected teachers to use. A teacher at one CMO said that having a clear sense of what it would mean to teach in her CMO helped inform her decision to apply:

I loved that they were looking for someone that wanted to do hands-on activities with the kids, and that's what my portfolio was all about. I had pictures from a dinosaur dig that I'd done once with a class, and I had all these hands-on photographs of projects that I'd done with my kids. They saw that, and it was exactly what they were looking for. It was the way I liked to teach.

These blunt recruitment messages for job candidates were, in the words of a CMO principal, designed "to give them as much information as possible" about the job, both positive and negative, so applicants had their eyes wide open about what the work would entail.

In addition to employing realism about the work, all of the case study CMOs used recruitment messages that described their organizations' missions and values. When used in combination, these two types of messages said: This job is hard, but we are doing it because we are on a mission to help kids learn.[11] Again, these messages helped people self-select into the application process based on whether a CMO's mission hooked them in or turned them off.

---

11. Research outside of education suggests that realistic recruitment messages may be less effective in tight labor markets, because they might scare off too many candidates (Henemen & Judge, 2006). In a tight labor market, a value-based or mission-based "brand" message may be more effective. See Herbert Heneman et al., *Staffing Organizations,* 7th ed. (McGraw-Hill/Irwin, 2011).

"We want to change education to give the kids what they deserve," one CMO leader told applicants. In another CMO, a teacher said the message she got during the hiring process drove her interest in the job: "These students need to have the same opportunities as students in other parts of the country," she said she was told. "Just because they come from a low-income area, it should not affect where they go in life—I was really drawn to that purpose."

"We've been very explicit, when we hire, about a sense of social justice," one CEO said. Another said that a key part of his CMO's recruitment strategy was a "rousing speech about our values and the mission and kids. . . . Everyone is in tears by the end of this thing, because the buy-in is just so incredible."

The CMOs didn't wait for candidates to get in the door before giving them mission-driven messages; they included them in the job descriptions for teaching positions. In a typical example, one of the case study CMOs stated that the first essential job duty for a teacher was to "understand the unique [CMO] environment and be able to uphold the mission of the school." A different CMO asserted that the first three essential job duties for a teacher are to know and adhere to the institution's mission, understand and live its values, and epitomize its motto. And another CMO's job description highlighted requirements that a teacher "[e]stablish a culture of high expectations that includes the shared belief that every student will attend college" and "[d]rive to improve the minds and lives of students in and out of the classroom."

The combination of these specific job descriptions and focused recruitment messages that target particular sources of teachers helped develop pools of candidates whom the CMOs believed were likely to be a good fit for their organizations. In the next two sections, we illustrate how CMO schools selected for fit from this pool by demanding a variety of work samples during the hiring process and requiring candidates to interact with a range of people in the school community.

Showing What You've Got: Work Samples and Selection

Teacher hiring in traditional school districts can often be compressed and quick. The titles of two studies of traditional district hiring say it all: "New Teachers' Experiences of Hiring: Late, Rushed, and Information-Poor" and "Certify, Blink, Hire: An Examination of the Process and Tools of Teacher Screening and Selection."[12]

12. Edward Liu and Susan Moore Johnson, "New Teachers' Experiences of Hiring: Late, Rushed, and Information-Poor," and Stacey Rutledge et al., "Certify, Blink, Hire: An Examination of the Process and Tools of Teacher Screening and Selection," *Leadership and Policy in Schools* 7, no. 3 (May 13, 2008): 237–263.

The CMOs we studied took a different approach. In the case study CMOs, school personnel used selection practices that, like practices used elsewhere in the charter school sector and in innovative school districts, took considerable amounts of time.[13] Nearly all of the CMOs required applicants to teach a demonstration lesson during the hiring process. In several cases, these lessons were relatively high-fidelity events in which applicants actually taught a class to charter students during the regular school day, or in which CMO staff observed the applicant teaching in his or her own school. "I usually like to see the teacher [applicant] in their natural element, where they're teaching now, if possible, and then also for them to do a demonstration here in front of our students," one CMO leader said.

While some principals mentioned that they used demonstration lessons to assess candidates' instructional practice, more often the CMO principals said they were looking for a general impression of how the candidates interacted with students. "Deep down inside, when it's all over and done with, you look at how they interact with other children, how they treat the kids," one principal said. This leader and others in the study said that they thought they could train teachers on instructional practice but were far less confident about their ability to help people develop rapport and character on the job.

Although uncommon, one of the CMOs required a work simulation on top of the sample lesson to assess how candidates interacted with other adults. As the CEO explained, "We put the applicants in teams of four and they work together to solve a problem. . . I just brought this [approach] up not long ago with a group of typical school district administrators. They don't do anything like it. They've never thought of watching them interact as a team." The leaders in this CMO talked about using this teamwork simulation not so much to assess candidates' content or instructional knowledge but to gauge their ability to collaborate and communicate with other adults in a productive and positive way.

Consistent with some prior research on selection in charter schools, CMO teachers who successfully navigated these hiring experiences spoke positively about the process.[14] Teachers said that it gave them information about the school and, importantly, allowed them to show what kind of teacher they were. In a representative quote, a teacher summed up how the demonstration lesson and interview provided her with a sense of match between herself and the school: "I went in and taught, and I left that interview and I remember telling my husband . . . 'They know what kind of teacher I am. They either want me and feel like I'm a good fit [or not].'"

---

13. Gross and DeArmond, "Investing in Selection: Hiring Teachers in Charter Schools;" Stephen Sawchuk, "District More Strategic About Hiring Teachers," *Education Week* 30, no. 33, (June 8, 2011): 1, 11.

14. Gross and DeArmond, "Investing in Selection: Hiring Teachers in Charter Schools."

At the same time, leaders and teachers acknowledged that demonstration lessons and simulations sometimes provided wrong impressions; teachers could do well in the sample lesson but struggle on the job. Nevertheless, these leaders said that sample lessons were generally an important part of their hiring decisions. They provided an opportunity for the school to see how candidates interacted with members of the school community and assess the degree to which their attitude, however defined, matched the organization's; as well, they helped weed out applicants who were unwilling to take a risk and teach a lesson as part of the job application. Survey results reinforced the importance of sample lessons in hiring decisions. Figure 1 shows the types of information that CMO principals considered most important when making job offers; the demonstration lesson is second only to commitment to the school's mission.

Figure 1. Most important factors in making job offer
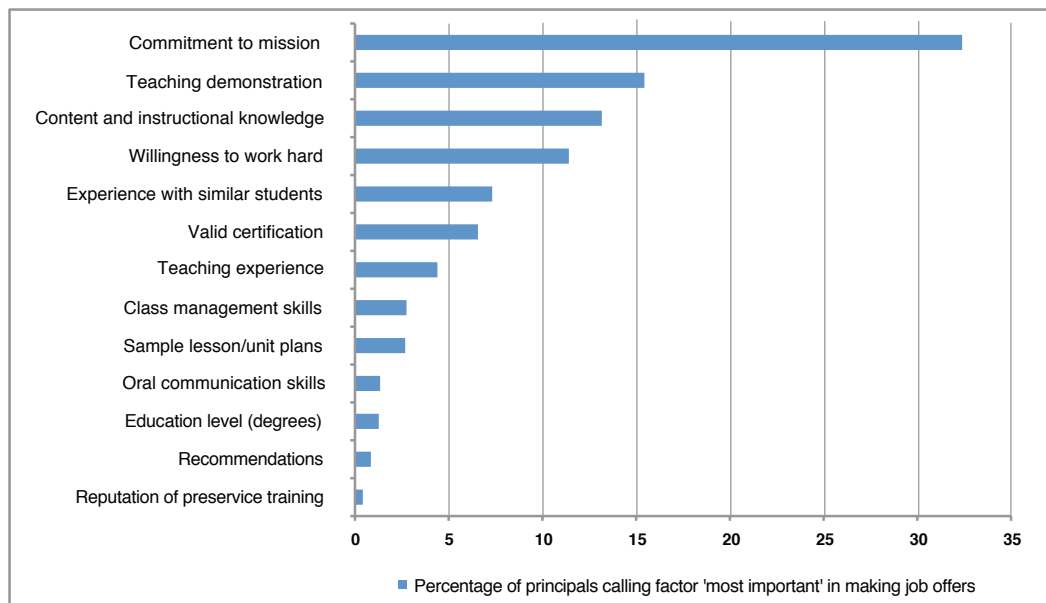
SOURCE: CMO principal survey, 2009.

Meeting the Family: Interviews and Interactions

A second way that several of the case study CMOs promoted the exchange of information during the hiring process was to involve an array of community members in the selection process—an approach also seen in the broader charter school sector.[15] To begin with,

15. Ibid. School-based hiring in traditional public schools typically includes interview teams with multiple stakeholders as well (teachers and parents, for example), but finding people willing to serve on these committees can be a challenge. See Michael DeArmond, Betheny Gross, and Dan Goldhaber, "Is It Better to Be Good or Lucky? Decentralized Teacher Selection in 10 Elementary Schools," *Educational Administration Quarterly* 46, no. 3, (June 29, 2010): 322–362.

CMOs often had current teachers take part in panel interviews with job candidates and observe their demonstration lessons. "It's been a team approach," a CMO principal explained. "If we're looking for a kindergarten teacher, well, guess what? I'm going to have my primary team leader in here. I'm going to have the kindergarten teacher in on the interview. So we get at least three perspectives on the candidate."

Some CMOs involved other members of the school community in the hiring process, too, including students and parents. One CMO teacher said:

> I went through a series of interviews. Having the kids interview me. Their parents interviewed me. . . And while most people would say, "I don't feel like doing this— this is way too much," it really intrigued me that they would spend that much time looking at their candidates.

This teacher's comment that some applicants might not "feel like doing this" makes the point that intense selection practices may weed out applicants who are unlikely to be committed enough to succeed at the school.

Involving a mix of the school community in the hiring process creates an opportunity for both the school and candidate to learn about each other through multiple and sometimes extended interactions. In particular, CMO and school leaders expected these selection processes to help them gauge candidates' soft skills. A leader said he looked for teachers who "were coming here for the right reason, that they really understood what the demands were going to be of the position, that they were okay with that . . . People with good character that really care and inspire kids and influence them the right way."

CMO school personnel recognize that qualities like a good character and the ability to inspire are difficult if not impossible to discern during the hiring process. Nevertheless, by creating selection processes that provided ample opportunities for candidates, school personnel, and students to interact with one another, CMO leaders hoped they were increasing the odds that they would hire teachers whose abilities and dispositions were a good match for the school and position. As we explain in the next section, CMOs also realized that ensuring a good match is not a one-shot event that happens only during recruitment and selection. It's something that needs to be developed and nurtured once teachers start working in the classroom.

An Example of Sending A Clear Recruitment Message from Mastery Charter Schools in Philadelphia, PA*

When applicants click on the "careers" tab on the Mastery Charter Schools home page,+ they get the following message:

The Mastery Difference

What if you could spend every minute of the school day focused on student achievement? Every day in schools across Philadelphia, Mastery teachers and leaders do just that. And they are eager to tell other educators about the difference Mastery has made in their lives. For the second year in a row, our teachers and leaders have spoken and made Mastery one of the top workplaces in the Philadelphia region.

What Makes Mastery a Top Destination for Educators?

Culture of High Expectations

We set the bar high. Student achievement drives every decision we make, and a rigorous learning environment is found in every classroom. Through meaningful use of data and assessments, leaders and teachers are able to pinpoint each student's accomplishments and challenges. That data informs our planning, and steps are outlined so that each student can reach mastery. Our goal is to close the achievement gap, and our staff does whatever it takes to get there.

One-Team Approach

We work together. Collaborative planning time is built into each school's schedule, ensuring time for honest and respectful feedback. Our clear and consistent approach to instruction and classroom management results in more learning time and a positive school culture. Our staff and students are proud to be a part of the Mastery family.

Leadership Development

We encourage growth. Professional development starts with an intensive summer orientation and continues throughout the school year. Every day, teacher growth is supported by school leaders, mentor teachers and instructional coaches. Our Apprentice School Leader Program creates intentional pathways from teaching to school leadership, enabling Mastery teachers to become Mastery administrators. Our teachers and leaders are continuously improving.

Rewards for Success

We value hard work. Teachers' and leaders' efforts are rewarded through merit-based pay and incentive programs. Tiered instructor levels mean constant opportunities for increased responsibilities and compensation, and achievement is acknowledged through annual bonuses tied to school performance. The leaders that drive schools' academic gains are rewarded with competitive incentives. Our students' potential is limitless; our work is rewarding.

---

* This example is not part of the data from the Mathematic/CRPE study; it's included here as a vivid illustration of the phenomenon we identified in the study data.

\+ http://www.masterycharter.org/careers/what-you-need-to-know.html

CREATING COMMON EXPECTATIONS AND PURPOSE ON THE JOB

Once the CMOs we studied recruited and selected teachers they believed would fit their organizations, most invested heavily in socializing staff around the organization's mission and expectations for how they should work to achieve that mission. In this section we illustrate how CMOs did this by insisting that teachers open their classrooms to ongoing observations and feedback from other teachers and administrators.

Showing Your Work: Teaching in Public

With remarkable consistency, the CMOs we visited expected teachers to watch each other work and to exchange feedback about their practice as a regular part of the school week. In a typical comment, one CMO leader said:

> *I would be surprised if you walk around today and see a teacher by themselves in class. . . . [Teachers] get a lot of help from coaches. . . . The literacy coach and math coach will come in and team-teach with you. And I've also have had the opportunity to co-teach, which is a great experience because obviously two people in the classroom are better than one.*

In this and other case study CMOs, teachers and administrators were constantly moving in and out of classrooms, observing each other teaching, providing feedback, and learning from each other. "If you're a carpenter and you really want to do good work, you don't just rely on your mentor," one CMO leader said. "You go around and you look at other people's work, and you say 'I want to learn how to do that. Show me how to do it.'"

This "show-me" ethos was a common theme in many of the schools in the study. In a different CMO, a teacher described how she learned from a master teacher who observed her teaching and met with her during a prep period. "If there are problems, then she is the first one to help out with the support," the teacher said. "For example, with discipline problems she'll say, 'Tell me what's going on. Tell me what steps you've gone through to kind of alleviate the problem,' and then, 'How can I help you with that?'"

In this particular CMO, in addition to visiting classrooms, master teachers met with grade-level teams two to three times a month to discuss student work and teaching strategies. The result was a teaching culture that normalized frequent observation and feedback; having a peer or supervisor walk into the class, either for a scheduled or unscheduled visit, was a typical part of the workday.

Both the principal and central office survey results make clear that in these CMOs teaching is a public endeavor. Principals commonly reported that teachers, whether they were newcomers or veterans, were observed teaching and given feedback during the school year (see Figure 2). Experienced teachers generally appeared to receive fewer observations and less feedback than new teachers did.

Figure 2. Observations and feedback in CMOs

A. Times per year NEW teachers...

B. Times per year EXPERIENCED teachers…
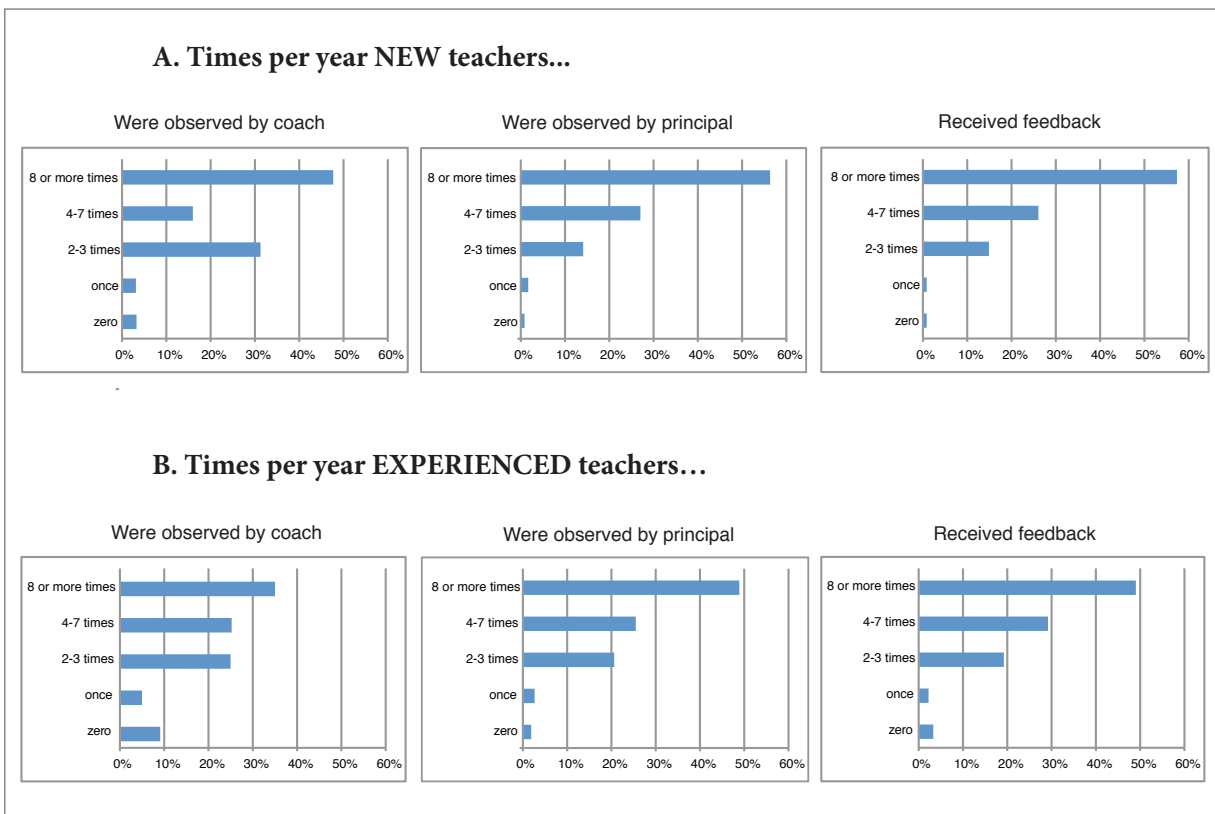
SOURCE: CMO principal survey, 2009.

When asked how much time they spent observing teachers during a typical work week, 55 percent of principals said that they observed between one and four hours, a third said five to eight hours, and just over one in ten said that they spent eight hours or more (Figure 3).

Figure 3. **Hours per week principals observed teachers in the classroom**
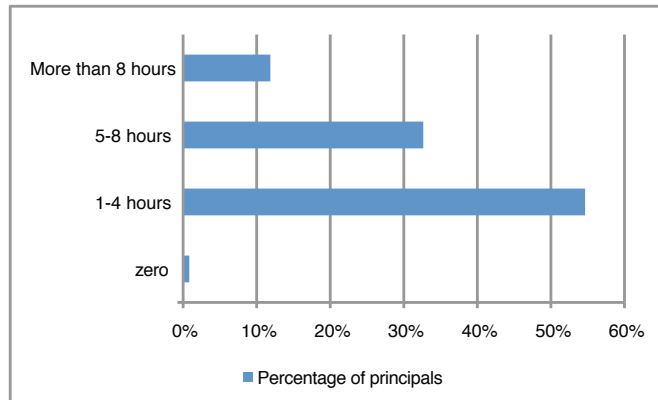
The important point about the public nature of teaching in some CMOs is that it allows people to engage in an ongoing exchange of information about whether teacher performance is contributing to a CMO's goals and strategies for improvement. In the schools we studied, this information exchange happened in a number of ways. In one CMO, school personnel communicated with each other about what they observed in classrooms using the school's computer network. The CEO explained:

> [W]ithin each building, there's a shared drive that teachers can respond to the principal, the principal to the teachers, with protected passwords. A principal might walk through a classroom at 10:30 and say, "I really liked what you were doing with that group, but I don't have a chance to stop and talk to you," or, "I think I would have done that a little bit differently. Let me come in and work with you," and they'll get that before the end of the day on the shared drive, and then they respond to the principal before the day is up. So it's pretty immediate.

In the CMOs we studied, such use of technology was unusual, but it was common for an administrator to gather formative information about teacher performance and

provide immediate feedback. CMO teachers and leaders reported that after observations, they frequently had conversations, both formal and informal, that touched on what in their practice was working and what needed to improve.

In one case, teachers received real-time feedback from coaches who provided advice during the lesson they were observing—for instance, on how to respond to certain student behaviors that popped up. In another CMO, a teacher said that conversations about teaching spilled over to the hours after work:

> It's not uncommon to get a call at night from one of the other teachers, or from an administrator, saying, "I was thinking about what we talked about, and you know what? You're right. I want to make sure that tomorrow I'm really positive with this particular student." It's just the idea that we as teachers, it's our responsibility, and whatever we want this school to look like, it's that it looks like that on a period-to-period basis.

That comment sums up how making teaching public helps organizational coherence: It creates a space where teachers are supported in executing the school community's shared vision, and held accountable for it. In the best cases, coaches, teachers, and leaders were literally looking to see if what was going on in classrooms was aligned with their organizations' goals and strategies, and made sure the work was adjusted as needed. The point is not just to calibrate what a teacher wants his or her classroom to look like, but what all of the adults in the building want their school to look like.[16]

As with the selection practices described earlier, the public nature of teaching was connected to more than instructional strategies. In many cases, it was also connected to the CMOs' overarching norms and expectations about the way adults worked together. A CMO teacher said:

> I think what I really like here that I never saw anywhere else was that if something's broken, we try to fix it. . . . We really discuss issues. We discuss ideas. We discuss how we're doing. . . . And what I really like is we don't really hide secrets. If something's not going well, it's right here, and we can see it in front of everybody. And while sometimes that might hurt people's feelings, when they see that their class isn't performing or something's not going right, we're there as a team to try to fix it.

---

16. Recent quantitative research suggests that frequent coaching and monitoring, particularly of new teachers, is associated with higher student achievement impacts. CMOs in which principals and coaches frequently observe new teachers and offer feedback and in which new teachers submit lesson plans for review by supervisors tend to have significantly positive student outcomes in both reading and math. Furgeson et al., *Charter School Management Organizations.*

"No secrets." "As a team we try to fix it." These phrases sum up the connection in this particular CMO between the visibility of the work and the CMO's expectation that adults be engaged problem solvers. "You have to be able to work with others and share ideas and take criticism to make [teaching] better in the classroom," another teacher at that CMO said, making the connection between the open door policy and a norm of collaborative improvement efforts. "You do whatever it takes to help those kids succeed."

Although less common among the case study CMOs, about two in five of surveyed CMOs said they explicitly laid out their expectations for teaching using a particular instructional framework. In one case study CMO that did require a particular instructional framework, an administrator explained that the framework was "non-negotiable"—all coaches and teachers were expected to teach in a particular way. Another case study CMO codified its key instructional concepts and strategies in a "taxonomy" of teaching. Leaders in this organization believed that this explicit approach was the backbone of the organization, one that sent unambiguous messages about what it meant to teach in the CMO. By expressing key principles straightforwardly and classifying practices in an organized fashion, the CMO gave teachers a common language with which to talk about their practice and provided leaders with a clear framework for observations and feedback (studies have found this to be the case in traditional public schools as well[17]). This same CMO had also developed a video database featuring thousands of clips of teachers demonstrating various techniques— literally showing teachers what it meant to teach to the CMO's expectations.

Formal Assessment: Teacher Evaluation in CMOs

In addition to collecting formative information about teacher performance, CMOs used formal evaluation systems that assessed how well teachers were contributing to the organizations' goals and strategies. If they were not fitting in, the CMOs provided teachers with improvement plans and dismissed them if needed.

The majority of CMOs reported in the central office survey that they used at least two different measures of teacher performance in evaluation systems, and about a third reported using three or more measures. Eighty percent of the CMOs incorporated principal observations, the most common measure, into their evaluation systems. About half indicated that they used student proficiency outcomes, and nearly 70 percent of those used some form of student growth calculation, such as value-added or other measures.

---

17. For example, see Newmann, King, and Rigdon, "Accountability and School Performance."

As with the job-embedded training described in the prior section, formal evaluations in the case study CMOs emphasized two-way communication about expectations and performance. For example, a principal described formal evaluations as "an opportunity to really go over all of their strengths and areas of growth" and to provide teachers an opportunity to do a self-appraisal, "so they let us know what they think is going right and what they need to work on."

The evaluation systems in the case study CMOs also incorporated a process to dismiss people who were not meeting expectations. In the school-based interviews, several CMO leaders said they preferred to minimize teacher dismissals, because they wanted to avoid the disruptions they caused for students and staff. Some leaders talked about going to great lengths to support and remediate struggling teachers, via coaching and feedback. But these same leaders also said that their students' needs were far too urgent to keep teachers who were ineffective. As one leader said, "Our philosophy is, you try to help people when they have potential, and that includes teachers. But if they don't respond to that help, we get rid of them."

Other CMO leaders said similar things about not hesitating to dismiss. "If somebody is not working out, we say, 'You've got to go' . . . I don't believe you keep incompetent administrators or teachers in the classroom," one leader said. A master teacher in the same CMO said something similar:

> If you can't get the job done, we try to remove you, because the child is the one who suffers. So we put kids first. . . . That's the model: kids first here and adults later. It's not based around being the best place for a teacher. It's the best place for a child.

It is difficult to get good information about dismissals from survey data, especially when those data are reported only from the employer. Nevertheless, the CMO central office survey provides some clues that dismissals are not uncommon. CMOs were asked in the central office survey the reasons any teachers left during the prior year. The CMOs reported that about half of the teachers left voluntarily. After that, the most common reason, at 37 percent, was dismissal for poor performance. These numbers do not allow us to understand how much of a CMO's teaching staff is actually dismissed each year, but they suggest that at the typical CMO surveyed, dismissals were nearly as common as voluntary departures.

Whether through in-person observations, feedback, or other mechanisms, the case study CMOs organized themselves to share information about their expectations for how adults interacted with students and each other and about how performance was measuring up to those expectations. As well, they built supports to help people meet those expectations and contribute toward a common purpose.

OPPORTUNITIES FOR CAREER ADVANCEMENT

CMOs further reinforced their coherence by offering career advancement opportunities and other rewards for teachers who exemplified the types of behavior and participation in the school community that were aligned with their goals and strategies for improvement.

Career Opportunities: Elevating Exemplars

As explained earlier, the staffs at CMO schools often include team leaders, coaches, or other types of mentors and leaders who help with the ongoing development of teachers. These positions are critical for developing common expectations and gathering formative information about teacher performance. In many of the case study CMOs, master teachers worked as stewards of the school's development process—leading weekly cluster meetings with teachers, for example, or field-testing new strategies for improving student achievement and analyzing their impact using assessment data.

Master teacher and coach positions offered opportunities for advancement for exemplar teachers. According to leaders in the case study CMOs, these spots were nearly always staffed with internal candidates—teachers who higher-ups in the CMO or school thought had the right skills and attitudes to support and develop their colleagues. A CMO leader described how the master teacher position works at that organization:

> They have no teaching schedule. They don't have any classes. Their job is to work every single day with their team. . . . The K-4 leader, she'll be in those classrooms every day mentoring, modeling lessons, gathering materials they need, helping them with assessments, sitting down planning with them. That's all they do all day long. They are not administrators. They are not assistant principals. They are academic people whose job is to work with teachers to enhance the academic growth of kids through their experience and their background.

The CMO central office survey suggests that career ladders within CMOs were commonly used to reward and challenge high-performing teachers. Most CMOs in the survey, 86 percent, reported that they used promotion to positions such as mentor teacher or department head as an incentive to retain teachers. The survey also suggests that CMOs looked to internal candidates when they opened a new campus, another way to reward good matches. In the central office survey, 53 percent of CMOs reported that they

seeded new schools with existing teachers, and 56 percent said they did so with existing principals. This strategy may help not only by providing new challenges to promising employees, but it also allows the CMO to transfer the culture and practices of successful schools to startup schools.

These opportunities matter to teachers. "When you take your career seriously and you decide this is going to be my career, you always want to see that you have the opportunity for advancement," one teacher said. "I want to be able to move up to the next level, should that be what I aspire to do." Another teacher at the same school said she was unsure about leaving her classroom to become a coach, but was glad she did. "They said I could go back to my classroom if I didn't like it," she said. "So I got in here, and I liked it." In the position, she said, "you have a lot of voice." As these and other teachers reported, the career opportunities in these CMOs were often open to teachers of all experience levels. Ultimately, these opportunities were about supporting the goals of the organization, not just improving individual teachers' practice.

Flexible Pay: Compensation Based on Judgment

The case study CMOs used a range of compensation systems to reward teachers. Some were traditional, mirroring local districts, and others included performance pay and other incentives. Figure 4 shows the percentage of CMOs on the survey who reported using various pay incentives. The most common incentives are similar to those found in traditional school districts: money for providing extracurricular activities or for performing extra duties. Just under half reported using extra pay for individual performance; a similar share said they offered schoolwide performance bonuses.[18]

The case studies suggest that these various incentives are not mutually exclusive. Instead, teacher pay appears to depend on a mix of factors. Although some CMOs may reward teachers for test scores, the pay systems described in the case study CMOs were not mechanical. Instead, they depended on leaders' judgments about how well teachers were performing across a host of criteria. One CMO, for instance, built a point system for teacher pay that is based partly on student scores, but also on factors like committee participation and adherence to the CMO's philosophy and instructional model. "We have no salary scale here—none," the CMO leader said. "I sit down with the principal and the team leaders and we go through every single teacher in every school, with the pros and cons."

---

18. By way of comparison, the US Department of Education's 2007-08 Schools and Staffing Survey suggests that around 10% of public school districts offer teachers pay incentives for "excellence in teaching."

**Figure 4. Share of CMOs offering different pay incentives**
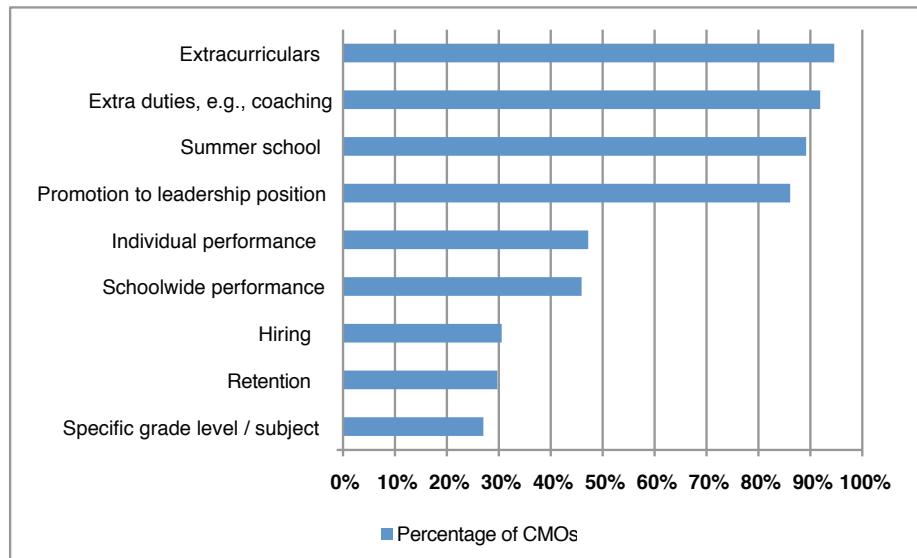
The CMO principal survey asked principals to indicate how important a range of factors were in determining teacher pay (Figure 5). A majority of principals said that administrators' assessments of teachers based on observations was "very important" or "somewhat important" in determining teacher pay. By contrast, most principals said that teacher seniority was either "not too important" or "not at all important" in determining teacher pay.

The emphasis on teachers' education level in pay is similar to what we might expect in traditional public schools. The low priority of seniority, as well as the importance placed on principals' classroom observations, are a departure from traditional schools, however. Principals surveyed reported that collaborative effort was not an important factor in determining teacher pay, a finding that runs somewhat counter to the impression from the case study CMOs that principals value teacher collaboration and interaction.

Figure 5. Factors that determine teacher pay
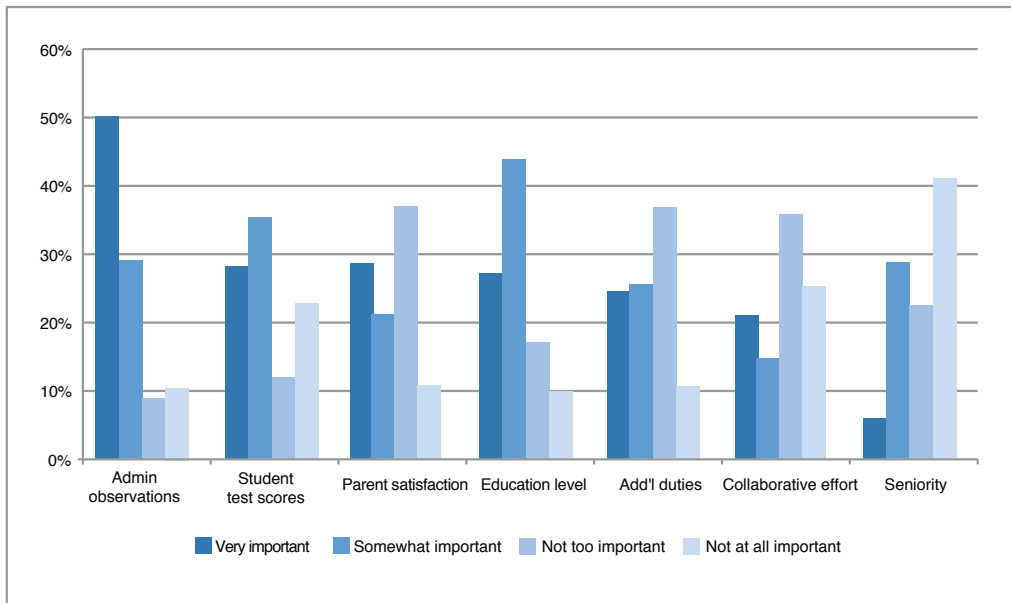
SOURCE: CMO principal survey, 2009.

Although compensation in some CMOs looks different than compensation in traditional public schools, several teachers in the interviews downplayed the monetary rewards of their work. As one teacher said:

> *A lot of my friends go, "I can't believe you're working as long as you're working." You know, at the extended school year. Or that I don't get home at a reasonable time. And while a lot of them laugh at that, when I'm able to tell them what we're able to do with these kids that come from a not-so-nice area compared to where we grew up, and our fifth graders right now are beating my [old] elementary school on standardized test scores . . . to me that's reward enough.*

CMOs may take somewhat different approaches to compensation and career advancement, but what they often share is an effort to align career incentives to their organizations' missions and create work environments that emphasize social interactions and relationships as much as, and often more than, formal management tools.

CONCLUSIONS AND IMPLICATIONS

Public education policymakers have embarked on a potentially game-changing wave of reforms to ensure that all students have effective teachers. From the introduction of new sources of talent and training to the fundamental reform of evaluation and compensation systems, leaders are looking for ways to transform the way they manage teachers to focus more on performance than ever before.

The great majority of policy attention around these reforms has focused on technical questions of how to create evaluation systems that are fair and reliable and include individual markers of teacher effectiveness, such as value-added measures. But effective teaching also depends on the match between a teacher and a teaching position and the coherence of the organization in which he or she works. As education analyst Andrew Rotherham recently wrote, "Teachers, just like other professionals in all walks of life, might be 'good' in one setting but not in another. They might thrive in one sort of leadership structure and not another, one type of school and not another, or one group of students and not another."[19]

In this report, we have suggested that school systems can manage talent in ways that take this point seriously. CMOs do so by identifying, developing, and retaining teachers who are not only good, but who are also a good match. We highlighted several ways in which CMOs manage talent for coherence: by implementing targeted recruitment and selection practices, organizing their work to build coherence, and creating opportunities and rewards that are aligned with and reinforce the person's match to the organization. These practices echo much of what we know happens in effective traditional school districts.[20]

What is striking about the CMO cases is that these systems did not just focus on professional development, as can sometimes be the case in traditional school districts. They also leveraged recruitment and selection practices, evaluations, and rewards to attract teachers and then further shape their matches with schools in ways that helped build organizational coherence. As a result, they cultivated an environment in which teachers knew what to do in order to advance the organizations' goals. Joined together as a system, these strategies reflect the fact that the match between a teacher and a school is not a status that is achieved and then automatically persists, but instead something that

19. http://www.eduwonk.com/2012/02/bruce-boudreus-lesson-for-education.html (Accessed April 20,2011).

20. See for example, Mary Kay Stein and Laura D'Amico, "The District as a Professional Learning Laboratory," in *School Districts and Instructional Renewal,* ed. Amy Hightower, Michael S. Knapp, Julie Marsh, and Milbrey McLaughlin (New York, NY: Teachers College Press, 2002): 61-75.

needs to be nurtured and developed in an ongoing way. Collectively, these broad practices send messages to teachers about what is unique about these organizations, socialize them to that uniqueness, and reward those who exemplify it.

The human resources practices used by the CMOs sent distinct messages about the demands and purpose of the work. These messages said, "We are a unique organization. Don't bother applying if you don't agree with our approach." These messages were evident not only during teacher recruitment, but also in selection practices, on-the-job development, and reward systems. They communicated clear signals about the organizations' priorities and expectations: They are visible and—importantly—relevant to the organization's ultimate goal of improving student achievement. By owning these practices, top leaders reinforced a strong climate in which individual effort was continuously framed in light of a common purpose.

At the same time, it is clear that managing talent for coherence is not easy. Even when CMOs are able to develop systems that do the things described in this report, they create a new set of problems. As CMOs begin emphasizing fit as well as quality, they can quickly face a shortage of desirable candidates. Although some CMOs were able to find subsets of candidates that met their needs among traditional sources of teachers, more CMOs said that they had trouble finding the types of teachers they wanted. This supply problem has led some well-known CMOs, including KIPP and Uncommon Schools, to begin developing their own teacher training programs, first with Teacher U at Hunter College and now Relay Graduate School of Education. In the future, as CMOs and school districts become more careful recruiters of talent, they will likely need to forge new partnerships with traditional and nontraditional preparation programs to ensure that they have a pipeline of talent that is not just good but also a good match for their schools.

Teachers in typical charter schools already have a full course load and long days. As CMOs place more and more demands on teachers—intensifying both the scrutiny and accountability involved in the work—they can create an unsustainable job and, in turn, increase teacher burnout. With an annual teacher turnover rate in some places of about 30 percent, some CMOs have responded by redoubling their efforts to provide intensive coaching and enculturation for new teachers.[21] Although there are CMO leaders who view teacher turnover as an opportunity for new energy and growth, others worried

---

21. Robin Lake et al., *Learning From Charter School Management Organizations: Strategies for Student Behavior and Teacher Coaching* (Seattle, WA: Center on Reinventing Public Education and Mathematica Policy Research Inc., 2012).

about the costs of turnover and believed they need to develop systems that give teachers more time and support so they can both reflect and have a healthy personal life despite their high-pressure work environment.

Finally, efforts to develop organizational coherence through talent management need to be mindful that coherence and culture are ultimately useful to the extent that they focus on improvements in teaching and learning. If schools have a strong culture that emphasizes good adult-to-adult relationships without focusing on improving teaching practice or student learning, for example, the culture might become a barrier to school improvement. Coherence is important, but so is its orientation. These three considerations—supply, turnover, and the orientation of coherence—notwithstanding, the CMOs in the study believed the types of practices described in this report were key levers for finding and developing the kinds of teachers who would allow the organization to pursue their missions successfully.

Traditional school districts can learn from the way that CMOs manage talent for coherence. To start, districts must understand what kinds of teachers their schools need to be successful and make a plan for how much talent management should be done centrally and how much can be left up to individual schools. None of the practices in this report are worth pursuing for their own sake. They only make sense in the context of schools that have clear goals and strategies for getting there. So before thinking about the types of personnel practices that can help schools manage for coherence, a district needs to consider, more broadly, the systems, freedoms, and supports that schools and school leaders need in order to develop both a coherent purpose and a plan for achieving it.

Once that theory of action is in place, the experience of CMOs raises several key points for how districts might think about managing talent for coherence. These include:

- The importance of having central office recruiters who have relationships with a variety of sources of teachers (the best traditional preparation programs, but also alternative programs) and understand what each source has to offer.
- The importance of helping principals or networks of school leaders craft recruitment messages targeted to their schools' mission and work culture. Districts might assign this task to specific personnel, sometimes called case managers, who work with subsets of schools that they know well.[22]

---

22. Meredith I. Honig, Michael Copland, Lydia Rainey, Juli Anna Lorton, and Morena Newton, *Central Office Transformation for District-Wide Teaching and Learning Improvement* (Seattle, WA: Center for the Study of Teaching and Policy, University of Washington, 2010).

- The importance of selection practices that go beyond just interviewing. If selection happens primarily at the school level, principals need to be given autonomy to assess candidates in new ways, training in how to do so—for example, in how to arrange and evaluate demonstration lessons—and sufficient time to administer these more extensive selection practices.
- The importance of providing or brokering differentiated supports for schools that are aligned with school-based improvement efforts (for example, by providing coaching and other job-embedded professional development).

State budgeting timelines, labor contracts, and other regulatory and political realities complicate the ability of school districts to do many of these things. At the same time, the scores of new teacher evaluation systems going into effect around the country offer an opportunity to broaden the conversation surrounding teacher effectiveness and its relationship to school coherence. Schools and school systems around the country—both charter and traditional—should seize this opportunity to ask themselves how they might take a more integrated and intentional approach to attracting, training, and managing high-quality teachers. As change brews, they should look at teacher effectiveness not in isolation but as part of a broader set of factors related to schools and the organizations that oversee them.

APPENDIX: METHODS

This report relies on data from the National Study of Charter Management Organization Effectiveness, a study jointly conducted by Mathematica Policy Research and the Center on Reinventing Public Education (CRPE). The study examined 43 CMOs that meet the following criteria:

- They operated four or more charter schools in the fall of 2007.
- They were nonprofit since their inception.
- They had operational control over schools (e.g., they could remove principals).
- They had brick-and-mortar schools, not online or distance learning models.
- They served a general student body, rather than a special population.

All 43 CMO central offices were surveyed on a range of topics, including teacher recruitment and retention. The response rate for the CMO survey was 86 percent. Within these CMOs, 292 principals were also surveyed about a range of topics, including teacher hiring and support. The response rate for the principal survey was 76 percent. In addition, teams of researchers conducted field visits to 10 CMOs and 20 associated schools. Fieldwork in these 10 CMO case studies included semi-structured interviews with CMO-level leaders, as well as principals and teachers. In addition to interviews, researchers conducted school walkthroughs and classroom observations at each school site. Although all of these data sources were valuable for this report, our analysis relies more heavily on the interview data than on the survey data. Table A1 shows the number of interviews by respondent type across the 10 case study CMOs. More details on sample selection can be found in reports from the larger project.[23]

---

23. Lake et al., *The National Study of Charter Management Organization (CMO) Effectiveness*; Furgeson et al., *Charter-School Management Organizations*.

Table A1. Interviews by case study CMO and position

CMO	CMO-level Leaders	Principals/Admin	Teachers	Total
A	7	3	8	18
B	9	2	3	14
C	4	2	6	12
D	5	2	5	12
E	6	4	10	20
F	3	5	7	15
G	4	3	5	12
H	6	2	6	14
I	5	2	6	13
J	4	2	6	12
TOTAL	53	27	62	142

Together these data offer a rich array of evidence about CMOs, including in-depth accounts in the 10 CMO case studies as well as evidence of broader patterns in the surveys. For this report, we reanalyzed the case study and survey data with the following questions in mind:

- How do CMOs recruit and hire teachers?
- How do they develop them on the job?
- How do they manage performance?

To answer these questions, we reviewed interview transcripts, case study summary memos, survey data, and documents (e.g., school handbooks, job postings, evaluation rubrics). Our main analytical tools were a series of cross-case matrices that arrayed the interview data across our main research questions (and a series of sub-questions) and a series of analytical memos that looked at each case study CMO separately as well as cross-case memos. The principal survey results presented in the paper were weighted for principal nonresponse within each CMO.[24]

---

24. For more detail on the weighting procedure, see pp 91-91 in Furgeson et al., *Charter-School Management Organizations*.

center on **reinventing** public education

UNIVERSITY OF
WASHINGTON
BOTHELL

Center on Reinventing Public Education
University of Washington Bothell
425 Pontius, Suite 410
Seattle, Washington 98109
T: 206.685.2214
F: 206.221.7402

www.crpe.org

The Center on Reinventing Public Education at the University of Washington Bothell engages in research and analysis aimed at developing focused, effective, and accountable schools and the systems that support them. The Center, established in 1993, seeks to inform community leaders, policymakers, school and school system leaders, and the research community.