



THE BEST OF BOTH WORLDS: School District-Charter Sector Boundary Spanners

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About This Report

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ABOUT THE CENTER ON REINVENTING PUBLIC EDUCATION

Through research and policy analysis, CRPE seeks ways to make public education more effective, especially for America's disadvantaged students. We help redesign governance, oversight, and dynamic education delivery systems to make it possible for great educators to do their best work with students and to create a wide range of high-quality public school options for families. Our work emphasizes evidence over posture and confronts hard truths. We search outside the traditional boundaries of public education to find pragmatic, equitable, and promising approaches to address the complex challenges facing public education. Our goal is to create new possibilities for the parents, educators, and public officials who strive to improve America's schools. CRPE is a nonpartisan, self-sustaining organization affiliated with the University of Washington Bothell. Our work is funded through private philanthropic dollars, federal grants, and contracts.

Introduction

A few years ago, Houston's Spring Branch Independent School District (SBISD) was, by most measures, a typical school district. Superintendent Duncan Klussmann had worked his way up through district ranks, was well liked, and had a supportive school board. Like urban districts in cities across the country, SBISD had its share of persistently struggling schools, but on average, its test scores topped those of several other area school districts. Then, in 2012, Klussmann did something that few superintendents in Houston, in Texas, or even across the country would consider doing: he filled an influential cabinet-level opening with a prominent and long-time charter school leader. Elliott Witney, a popular and lauded principal at a KIPP (Knowledge is Power

Klussmann did something that few superintendents would consider: he filled an influential cabinet-level opening with a prominent charter school leader. The job description read, "Responsible for the strategic direction of the district."

Program) Houston school, was looking for a way to broaden his work in education and was excited by Klussmann's offer to play a critical leadership role in the district. His new job description at SBISD read, "Responsible for the strategic direction of the district."

Klussmann was focused on finding ways to continue to improve the system and serve all children as effectively as possible. He was especially interested in how to support the district's struggling schools; a pair of local high-performing charter school leaders invited him to tour their schools, believing they had

something to share. Klussmann was impressed by what he saw and soon after offered Witney a job in the school district, paving the way for a different perspective. Bucking a nationwide trend of animosity between traditional school districts and charter schools, Klussmann challenged conventional wisdom—as well as himself and the district he led—to reconsider how the central office supports schools, finds and unleashes talent, and unifies under a shared goal, rather than following a prescription for how to get there.

As Executive Director of Strategic Initiatives and Innovation, Witney was responsible for the strategic direction of the district. Klussmann gave Witney both the authority to help shape the work and a promise that he would have the superintendent's ear.

From its inception, the SKY partnership, a unique district collaboration between SBISD, KIPP, and YES Prep Public Schools, was seen as a way to move past entrenched district and charter alliances and to shift the focus toward improving all schools regardless of who ran them. Notably, the goal of doubling the college- and career-ready graduation rate from 36 percent to 72 percent was a citywide goal that its architects believed could only be achieved by a team effort. Soon after Klussmann hired Witney, Witney in turn hired Mandelé Davis, from YES Prep, to provide logistical and project management support for a piece of his work, the SKY Partnership Together. But in distinct ways, the two have worked to bridge the district and charter cultures and to ensure the district makes the most of this attempt at cross-sector fertilization. Witney and Davis are what is known in organizational literature as "boundary spanners."

A growing number of cities are moving away from the idea that charter schools are the enemy and instead are breaking down barriers and openly discussing how to share resources, responsibilities, and knowledge of what works. If, as originally conceived, charter schools are laboratories of innovation and practice, then hiring top administrative talent from the charter sector may be one creative and efficient way to bring innovation into the traditional school districts and to bridge the divide between the two sectors.

OUR STUDY

We set out to learn about the role of boundary spanners in traditional school districts, specifically:

- If and how they have bridged the gap between districts and charter schools.
- How they manage the difficult politics inherent in these relationships, build trust between sectors, and improve communications.
- Which factors impede their work.
- Which factors help them do their work successfully.

A 2010 Bill & Melinda Gates Foundation initiative provided school districts and charter leaders with funding and technical support to sign non-legally binding but very public “Compact” collaboration agreements. These signed agreements map out priorities and goals for the two sectors and include pledges to develop cross-sector professional development, to adopt common enrollment or accountability systems, or to work together to tackle shared challenges, including improving services for special education students or increasing per-pupil funding. To date, education leaders in 21 cities have signed District-Charter Collaboration Compacts and at least five more cities are currently working on drafts of their own.

CRPE researchers contacted administrators in each of the 21 districts that signed a District-Charter Collaboration Compact to determine if any high-level school district administrators fit our definition of a boundary spanner; that is, they had led charter schools or held executive positions within charter management organizations prior to working in the district. We were given the names of six people in four districts: Denver, Spokane (WA), and Spring Branch ISD in Houston. One interviewee who had recently left a position in a large urban compact district asked not to be named, nor have the district identified. We contacted these six individuals and each agreed to participate in the study. During the course of interviews, we learned of two other recently hired boundary spanners working in two districts that had not signed collaboration compacts (Albuquerque and Atlanta). We subsequently contacted these two individuals who also agreed to participate.

CRPE researchers conducted semi-structured interviews with each of the eight identified boundary spanners. Researchers also interviewed three of the six superintendents who hired these leaders, six district staff who worked directly with the boundary spanners, and four former and current charter school colleagues and counterparts. A total of 21 interviews were conducted. To complement and verify some interview data, researchers also gathered documents developed by or relevant to the boundary spanners’ work. Researchers coded and analyzed all collected data for cross-city themes.

What we learned is meant to help districts, mayors, and civic leaders better understand the potential advantage of boundary spanners, and which skills and support are essential for their success. For charter school leaders, these findings should also shed light on the potential challenges and rewards of this career move.

SUMMARY OF FINDINGS

Boundary spanners perform critical functions, especially in cities where mistrust and combativeness between the district and charter worlds have been the norm. Effective boundary spanners focus on overcoming false dichotomies so that sectors can learn from each other, and encourage or facilitate equitable resource exchanges and productive conversations about how charters can play a more integrated role in the district—for example, by taking on more children with special needs. In other words, boundary spanners create an environment of true partnership, not just negotiated truces or deals.

School district leaders who are committed to not only working with high-performing charter organizations, but also to extracting lessons from them, need an edge. Boundary spanners who bridge the charter-district worlds can be that edge.

But traversing the typical “do not cross” line between the school district and the charter sector is a challenge for these boundary spanners, who can become frustrated by bureaucracy and the slow pace of change in a district setting. They must walk the tightrope of overcoming suspicion and resistance from their new district peers, while reassuring their former charter colleagues that they continue to understand their concerns. Some boundary spanners are not given enough authority to broadly influence district practice and their impact is often hindered by leadership

transitions, especially when the new leader does not endorse his or her predecessor’s ethos of cooperation.

Despite these tensions, boundary spanners are proving to be a critical asset in districts that hope to coordinate or partner with charter schools, and especially those that hope to import some of the strongest ideas and energy of the charter sector. The boundary spanners interviewed for this report have managed to breathe fresh air into the relationship between the sectors and catalyze the transfer of knowledge between them. Those who have succeeded bring more to the central office than simply experience in the charter sector. They combine the soft skills of negotiation and creativity with credibility in both sectors to act as translators, help broker historically shaky relationships, and artfully transform traditional thinking.

To be successful, boundary spanners need a unique blend of skills and characteristics, as well as significant authority and support from the superintendent. Citywide, education leaders who may be siloed in one sector or the other must see the potential power of blurring traditional charter-district lines to improve the educational options for all public school children in a city.

Bridging Disparate Worlds

The work through the Bill and Melinda Gates Foundation Compacts initiative and of district-charter collaboration in general is highly contextual. Local factors including politics, leadership commitment, legal constraints, size and performance of the charter sector, and charter authorizing practice all shape how and if the collaboration thrives, survives, or dies. CRPE's 2013 interim report on the progress of compact cities shows that some cities have seen big wins for students, including the adoption of common school enrollment systems across district and charter schools, shared and more robust pipelines for teacher and leadership talent, and a performance framework that allows for easy comparisons between and across school types. However, no one describes the work as being easy. School district leaders who are committed to not only working with high-performing charter organizations, but also to extracting lessons from them, need an edge. Boundary spanners like Elliott Witney, who bridge the charter-district worlds, can be that edge.

Superintendents in four compact cities have filled high-level administrative positions from directly out of the charter sector. Other major urban non-compact school districts have done the same, and this idea is being played out in community organizations and in the offices of city and state government. Several state department of education offices, including those in Maryland and Delaware, have hired talented education leaders with experience across district and charter sectors to help shape and lead state education policies and programs that recognize strengths wherever they emerge.

At the city level, mayors from Sacramento to Philadelphia have claimed their stake in the work of improving the education of their city's children. Some of these mayors responded to the intractable politics between the sectors by creating a position within their office for a highly skilled boundary spanner to work across and between the sectors. Then-Washington, D.C. Mayor Adrian Fenty chose Abigail Smith, who had both district and charter experience, to serve as the city's Deputy Mayor of Education. Known to jokingly tout her "bilingual" credentials, she was instrumental in bringing both sides to the table to develop and implement a new streamlined and common public school enrollment system that allowed parents to rank school choices, district and charter together. Smith knew from her experiences that both charter and district leaders recognized the need to work together on enrollment, but mistrust between sectors created an impasse around certain implementation details that the mayor's office had to bridge. Because both sides trusted Smith, she was able to broker agreement on this and other issues. Smith's successor also brings this dual perspective and same mandate to her role.

In school districts, boundary spanners are tasked with a variety of roles and levels of authority. Witney has been asked to import the DNA from a high-performing local charter and to help all district schools operate with more autonomy and an innovative mindset. In Spokane, Washington, the first district to authorize charter schools in a state that had long been opposed to them, Superintendent Shelley Redinger hired Jeannette Vaughn, who had led a highly successful California charter school for seven years. Among many other responsibilities, Vaughn was asked to work in partnership with the district and help ensure the new independent schools would be supported. In Albuquerque, Katarina Sandoval, who also led a high-performing charter school with a long waiting list, was charged with turning around declining district enrollment. In Atlanta, an incoming superintendent tapped David Jernigan, a local KIPP leader, to be her second in command.

Over time, the role of the boundary spanner can change as leaders prove their worth. Denver Public School's superintendent Tom Boasberg initially hired Alyssa Whitehead-Bust to manage the Office of School Reform and Innovation, but she was recently appointed to a top role in the district as Chief Academic and Innovation Officer.

REVIEW OF LITERATURE ON BOUNDARY SPANNERS

The phenomenon of boundary spanners is not a new one. Organizational sociology has long studied boundary-spanning roles, how they function within organizations, and the conditions under which these roles are created and proliferate. Within the fields of public administration and organizational management, boundary spanners are defined as individuals closely involved in day-to-day relationship-building and management of multi-organizational or multi-sectoral relationships.¹ Researchers have considered what boundary spanners do, the difficulties they face, and the conditions that influence their decision making. Although academic research on boundary spanners in education settings is limited, the general research findings are relevant here. Boundary spanners are most often found in innovative organizations seeking to enhance their practice or the services they provide.

Boundary spanners can play a critical role in communication and information flow across organizations.² They can bridge gaps in social structure and create new connections between previously unconnected people.³ The language and culture of organizations as well as their theories of change often differ, which make the act of translation an important part of the boundary spanner's job. Translation is particularly important when boundary spanners cannot change organizational routines on their own; they must translate information from outside the organization into an accessible form for others to use.⁴ Because boundary spanners selectively filter, summarize, and synthesize incoming and outgoing information, the position is a potentially powerful one, depending on the extent to which an organization relies on their expertise.⁵

Another key function of boundary spanners is to represent each side's perspective.⁶ In an environment rife with misperceptions, such as those that exist between a school district and a charter organization, a boundary spanner's ability to accurately represent the motives and cultural mores of one sector to another can make a large difference in the success or failure of a collaboration. In partnerships characterized by risk and uncertainty, boundary spanners also play an important role in the formation of inter-organizational trust. Boundary spanners provide the direct interpersonal contact that is important in accumulating knowledge and trust about the partner organization and its motives.⁷ Boundary spanners can improve relationships and trust with those organizations, but they can also be perceived as regulatory instead of supportive.⁸

1. Paul Williams, "Special Agents: The Nature and Role of Boundary Spanners." Paper presented at the ESRC Research Seminar Series, Collaborative Futures: New Insights from Intra and Inter-Sectoral Collaboration, University of Birmingham, February 2010; Gary Noble and Robert Jones, "The Role of Boundary-Spanning Managers in the Establishment of Public-Private Partnerships," *Public Administration* 84, no. 40 (Dec. 2006): 891-917; Ranjay Gulati and Maxim Sytch, "Does Familiarity Breed Trust? Revisiting the Antecedents of Trust," *Managerial and Decision Economics*, 29, no. 2-3 (2008): 165-190.

2. Michael L. Tushman, "Special Boundary Roles in the Innovation Process," *Administration and Science Quarterly* 22, no. 4 (Dec. 1977): 587-605.

3. Katherine Stovel and Lynette Shaw, "Brokerage," *Annual Review of Sociology* 38, (2012): 139-158.

4. Meredith I. Honig, "Street-Level Bureaucracy Revisited: Frontline District Central-Office Administrators as Boundary Spanners in Education Policy Implementation," *Educational Evaluation and Policy Analysis* 28, no. 4 (Winter 2006): 357-383; Tushman, "Special Boundary Roles in the Innovation Process;" Michael L. Tushman and Ralph Katz, "External Communication and Project Performance: An Investigation Into the Role of Gatekeepers," *Management Science* 26, no. 11 (Nov. 1980): 1071-1985.

5. Howard Aldrich and Diane Herker, "Boundary Spanning Roles and Organization Structure," *The Academy of Management Review* 2, no. 2 (Apr. 1977): 217-230.

6. *Ibid.*

7. Gulati and Sytch, "Does Familiarity Breed Trust?"

8. Aldrich and Herker, "Boundary Spanning Roles and Organization Structure"

The Benefits of a Boundary Spanner

We observed all of the traditional boundary spanner functions and more at play in the district-charter context. In all six districts included here and at varying levels, boundary spanners brought intangible benefits to their jobs, such as improved relationships and an increased level of trust with the charter sector. Their work also had concrete benefits to district-charter partnerships and district-wide reforms. In Denver, boundary spanner Whitehead-Bust was credited with successfully shepherding the adoption of a common enrollment system for both district and charter schools, easing the school enrollment process for families. Another Denver boundary spanner, Brenna Copeland, helped shepherd both sectors toward the development of a shared accountability tool that enabled city leaders and community members to see how all schools performed relative to one another.

TRANSLATING AND MYTH-BUSTING

Although superintendents did not admit to hiring boundary spanners to dispel charter school myths within the district, this was a role all the boundary spanners in this study assumed. Spokane boundary spanner Vaughn warmly welcomed questions from colleagues about charter schools. She believed that being open and non-judgmental was key to encouraging curiosity and promoting evidence-based perspectives. Similarly, in Spring Branch, Superintendent Klusmann described Witney as a cultural ambassador:

“He is someone who understands the mindset of the charter, so if you’re ever grappling with something, you have someone who could say, ‘Well, this is why they think that way.’”

Witney illustrated his role in managing the expectations that charter school leaders had for the work within the district:

“The volume of stakeholders that are impacted in a system this big is just larger. ...In order to be methodical and thoughtful in your communication strategy, you can’t just pull the trigger, send an email blast to the key stakeholders and say job well done. You need to engage the community. You need to engage the board. So there have been times where I’ve had to say: ‘Guys, just understand we’re working as fast as we can and it’s going to take a month or two months longer to make this particular decision than it might in your organization.’”

TRUST-BUILDING

Boundary spanners aggressively work to figure out ways to build relationships between charter and district teachers, principals, and central office staff. In Spring Branch, Witney redesigned how the district develops leaders that included rolling out “school reviews” that create opportunities for district and charter principals to problem-solve together and receive confidential feedback. This has helped build informal cross-sector networks among principals. Spring Branch’s Davis facilitated connections between charter school leaders at co-located campuses and the central office, easing the schools’ transition to using district systems.

To be effective trust builders, boundary spanners must maintain a reputation as a credible ally of both charter leaders and district colleagues. But they are also willing to push back on charter autonomies that hinder citywide education goals. Their job is to build trust, but they are advocates for principles, not sectors.

To be effective trust builders, boundary spanners must maintain a reputation as a credible ally of both charter leaders and district colleagues. Those we interviewed described this as a careful balancing act. Atlanta’s Jernigan contributed what he knew about charter schools in meetings when helpful but admitted that he was careful to limit these remarks so as not to be viewed as “the charter guy.” Despite these types of limitations on how strongly boundary spanners could advocate for one sector or the other, both central office staff and charter principals expressed to us a belief that

the boundary spanner understood their priorities and circumstances and would faithfully represent their interests. One charter leader in Spokane described Vaughn as a “great advisor and a great person to go bounce ideas off of.” Denver’s Boasberg expressed confidence that Whitehead-Bust was completely committed to the district’s goal “to have the best public schools, district and charter, as possible.”

Boundary spanners also work hard to protect the autonomy of charter schools as well as encourage the practice of reducing central office constraints on district run schools as well. Both Vaughn and Whitehead-Bust described taking a strong stance within the district office when there was a suggestion to curb charter school autonomy. In Spokane, Vaughn worked to ensure that the contract between the district and the charter schools allowed the new schools the freedoms necessary for success. In Denver, school level autonomy coupled with accountability has been a tenant of the reform work there, which resonated with Whitehead-Bust. As she says, “Philosophically I have a deep belief in school-based autonomy, having been the beneficiary. That’s certainly a component of our district-wide reform writ large. We are trying to figure what the right balance of autonomy and flexibility and innovation is with a sense of deep accountability.”

But effective boundary spanners are also willing to push back on charter autonomies that hinder citywide education goals. Their job is to build trust, but they are advocates for principles, not sectors.

BROKERING

Boundary spanners are uniquely positioned to explain district policies to the charter community as well as help charters understand the district’s vision and constraints. Though he was instrumental in writing Spokane’s charter authorization, Chief Academic Officer Stephen Gehring was unfamiliar with the logistics of running a charter school. Vaughn was able to help him better understand how things like food service procurement, bookkeeping, and other nuts and bolts worked in a charter setting.

A good example of the skill and full potential power of a boundary spanner is the work of Whitehead-Bust in Denver. That district’s successful effort to create a citywide common enrollment system required delicate negotiations with both charter and district staff. When Boasberg indicated an inclination to mandate common enrollment for all schools including charters, Whitehead-Bust successfully dissuaded him from taking that stance.

Whitehead-Bust believes that the making participation for charter school voluntary ended up serving everyone better because it illuminated charter school concerns, prompting improvement to the overall system.

“You can imagine [Denver’s] SchoolChoice system becoming so rigid that it trumps the ability for schools to do what they think amounts to best practices for kids...We’ve created a much more flexible, much higher-quality system and still got all the charters to participate.”

This specific example of a successful negotiation highlighted for Whitehead-Bust the advantages her perspective brings:

“I think the role that my team can play is really trying to figure out where a sweet-spot solution is ... to get onto the balcony, think about an issue from both the charter leaders’ perspective and the districts’ perspective, and we’re often able to negotiate the solution in the middle.”

INTERNAL AGITATOR FOR REFORM

Boundary spanners, in some cases, assume the role of agitator and disruptor within the district office, but only if they have the superintendent’s support. They push the district in small or pivotal ways, depending on their roles and responsibilities.

In Spring Branch, Klussmann wanted Witney to be “disruptive” and to bring an innovation mindset. According to Klussmann,

“I wasn’t really looking for someone with charter experience, just someone who could bring a new perspective: I knew I wanted to create a spirit of innovation and I knew that needed to come from someone outside of our system and outside of traditional education ... Elliott’s strength was the way he processed things and thought about things differently and how he worked with our teams.”

A seasoned district administrator in Spring Branch discussed the impact of having Witney and his colleague, Davis, join the district:

“Both of them have worked with groups of kids that are traditionally marginalized and yet have done quite well. That’s the can-do attitude that we need infused in our system ... there’s a whole world of people who are dealing with public education that those of us in traditional systems never hear about.”

In other districts, boundary spanners have pushed for greater budget and instructional autonomy in district schools. They have facilitated co-located charter and district schools that share instructional practices, and have made it possible for district teachers to spend time in, and learn from, other charter schools. After some time of the job, boundary spanners also were able to communicate district challenges to sometimes-impatient charter leaders.

Not surprisingly, a successful boundary spanner needs to bring far more than just the name of a charter school on their resume. When interviewees were asked to isolate what makes a boundary spanner successful, they downplayed the charter experience and instead focused on the soft skills such as humility, the ability to bring people together, strong negotiation skills, and the ability to think outside traditional patterns. The charter sector experience gave boundary spanners instant credibility in the charter sector and got them in the door, but it was these soft skills that interviewees believed made them successful at bridging the divide and getting work done.

CHALLENGING FALSE DICHOTOMIES

Boundary spanners consistently said they worked to blur dividing lines between the district and the charter sector. They upheld good practice wherever it existed, and constantly worked to balance interests. To do that, they had to feel allegiance to a goal greater than either sector. “I’m here physically at [the district] but in my work I’m representing everybody,” one leader told us. Boundary spanners in some cities not only made sure district employees were exposed to charter school practices, but also took charter leaders to see good practices underway in district schools.

Boundary spanners’ allegiance to the greater good motivated these leaders to work in districts and push for stronger practices across both sectors. The boundary spanners we interviewed had successfully led strong charter schools or charter organizations and described their work in the charter sector as highly rewarding. Yet they were all drawn to what they saw as the broader impact of district work. Jernigan in Atlanta accepted the new superintendent’s offer, in part, as a way to continue to be challenged professionally but more importantly to work in a system that touched children in 100 schools instead of 6 schools. Denver’s Whitehead-Bust also saw charters as an important but limited vehicle for change:

“I have never, even when I was in the charter sector, believed that the charter sector was going to be the panacea solution for education reform at scale. So the opportunity to try to create reform from a different seat was enticing to me. I think charters are a necessary, but not sufficient, component of a larger strategic reform movement.”

The motivations of Spring Branch’s Witney follow the same vein. As he puts it:

“I think that if we could figure out how to bring charter and traditional together in a traditional school district setting, then the lessons we learn are applicable in Spokane, in Bloomington, and in most other places in the country. I don’t know if every single school in America needs to be chartered to resolve some of the challenges we face in public education. I just find it hard to believe that that’s the only solution.”

Strangers in a Strange Land

Making the leap from one culture to another is challenging. Though boundary spanners build relationships and provide a fresh perspective, turning their ideas into reality can be more complex than anticipated.

Adjusting to the slow pace of change. One of the first things that boundary spanners noticed in their new jobs was the change of pace in getting things done. One boundary spanner recounted a small example to illustrate a larger problem: When he moved into his new district office he put in a request for a small credenza to store materials. After seven months, with no real explanation from the district office as to what the hold up was, he cancelled the order. He contrasted this with his experience in the charter sector where he would simply check the budget, then purchase whatever was needed. As he said, “There’s a form and a policy and a procedure for everything and so there are times when I wouldn’t say I got my hands slapped exactly but I didn’t know I needed to ask for permission. That’s definitely been a challenge. But in those situations I never fail to say, well you know it can be and it is done a different way elsewhere.” All but one of the boundary spanners we interviewed had been hired within the last three years. As they settle in to districts—as with any position—they may gain perspective on what drives the pace of change in a larger organization.

People coming to districts from fast-paced charter environments, where they are used to working 10 to 12 hours a day and constantly changing and fine-tuning, must adjust to the realities of working in a school district. Change is often resisted, not embraced. Timelines for getting things done may be months, not days. Superintendent Klusmann watched carefully to make sure Witney stayed challenged and engaged: “You have to pay attention to whether Elliott feels like he’s being productive or if he’s getting bored.”

Moving from a schoolwide to a citywide context. For the boundary spanners in this study, the mission and reality of working in a large, diverse district context also took time to adjust to. Spokane’s Vaughn had come from a high-performing charter school with a focused approach and specific curriculum. In conversations with her district colleagues, they were surprised how often she suggested that several struggling schools employ this particular instructional approach. At one point, a district colleague explained to her that while a charter organization could maintain that focus, a district must consider a diversity of needs and interests across a city.

Vaughn described the transition to working in a central office:

“I’ve been thinking about this a lot. What is the role of central office as it relates to the schools and what does that look like? How can I help make the work more efficient and effective? Is it different because of scale? Working with departments that for the most part do their work very well but they do it in silos. Thinking about this has been at the forefront of my mind because it has huge impact on the work I do now.”

In Spring Branch, Witney struggled to find firm footing for his first six to eight months on the job, but Klusmann was patient and allowed him to take his time to settle in and to understand how the district functioned. In Denver, Whitehead-Bust admitted, “I would say that three-and-a half years in, trying to figure out change management in a district still feels new to me.”

Overcoming suspicions and resistance. When charter leaders we interviewed joined their districts, they knew they needed to wade in slowly. The traditional career ladder within a district central office starts in the classroom and works its way up rung by rung. When a charter leader joined the district ranks, some of their new colleagues did not see their experience as relative and believed they had “leap frogged” over others to get the job. For this and other reasons some boundary spanners described initial mistrust and hostility toward them and toward charter schools. An essential function of the job, then, is slowly working to build credibility and trust across sectors.

The tensions can be especially high with boundary spanners whose job it is to try to help shift district thinking. Central office staff and school staff can be threatened by “outsiders,” feel uncomfortable, or simply dislike change. In some cases, the superintendent or another trusted insider has to step in to manage the change.

The unassuming way in which the boundary spanners we interviewed inserted themselves into district conversations was evident in how their colleagues described them. Regarding Spring Branch's Witney, a school principal remarked,

"He never gives you the answer. He always gives you another question for you to come to your own conclusion and not in a guiding or like 'I'm going to get you to the answer I want to get you to.'"

One district colleague described her appreciation of the efforts Witney made to earn trust:

"I think early on it was probably a challenge for him to gain trust that he wasn't just this charter guy coming in to tell us what to do. [He acted like] 'I'm coming in to listen and be a helper and a thought partner and an advisor and help you think about things differently. And I'm just here to help your kids be successful. First and foremost, I'm here about kids.' And I think once everybody realized that, [his charter experience] wasn't an issue."

Albuquerque's Sandoval described her transition this way:

"I worried that people would say, 'Who the hell are you?' So I get that. That's why the first couple of months were all about building trust. People are waiting to see who you are, what you're about. So I did a lot of one-on-ones, a lot of reaching out to people, hearing what they had to say, what their vision was and building trust ... And that provided dividends down the line, it's providing dividends now and interest because now they know who I am, they know what I'm about."

Lacking real authority. Witney and Whitehead-Bust were granted high levels of authority within their districts, but this is not always the case. Superintendents sometimes bring former charter leaders in to the district office to manage the relationship across sector lines. But if the authority of the boundary spanner is limited, it not only limits their ability to broaden district thinking, it can also cripple their collaboration work with the charter sector.

In each of our cases, the superintendent determined the level of influence the boundary spanner had within the district. We saw two ways that authority was granted. When superintendents were open and ready consider new ways of running a school district, they granted high levels of authority to the boundary spanner. Indeed, this was the stated motivation in hiring. In contrast, when superintendents sought only to improve the working relationship with the charter sector, or to tweak district policies at the margins, the power they granted these new hires was limited, as was their access to the superintendent.

Our interviews underscored how even when boundary spanners are hired to facilitate collaboration, they continued to need direct access to authority or they risked losing credibility with the charter sector. When the charter sector senses that the boundary spanner's authority is limited, it can have a debilitating impact on their interest in collaboration. One charter school principal described the "paralysis of conversation and innovation" that sometimes resulted from district bureaucracy. This undermined the boundary spanner's effectiveness and made the charter collaborator reluctant to meet just for the sake of meeting, if she feared no concrete action would result.

Inevitably, tensions are inherent in trying to bridge the district-charter divide. The practice of maintaining central control has evolved over decades, and districts will not be quick to relinquish it. For their part, charter schools would fall on their sword to maintain the thing that separates them from the district—their autonomy. When well-suited leaders from the charter sector are brought in to a school district, are given time to adjust, and the authority to challenge thinking and practice, then their potential as a catalyst for the transfer of knowledge is realized.

WHEN THINGS GO BADLY

Of course, things don't always go well for boundary spanners, or for the districts into which they are hired. If a superintendent places too much of the burden of the cross-sector work or relationship-building on one person and fails to establish a broader context of innovation and open-mindedness within the district, the boundary spanner's ability to bridge the divide is hamstrung at best and impossible at worst. This was the case in one district we looked at and there were early indications in another city that things were beginning to head in this direction as well.

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Since it is superintendents that hire these leaders, and since the average stint of a superintendent is less than four years, boundary spanners can find themselves answering to a new superintendent who does not share his or her predecessor's interest in working across sector lines. Sometimes these leaders plug away and continue to work to engage with the charter sector, but without the support of the leadership in the district, their credibility is undermined and their job satisfaction plummets. In one city, a former charter leader resigned from her district post, feeling deeply disappointed that most of her hard work was being undone and sectors were retrenching in rapid order.

Keys to Success

Despite these challenges, some of these leaders have artfully challenged traditional thinking within the central office. They have successfully pushed for greater levels of school autonomy, the adoption of common enrollment systems, the practice of district and charter school co-location, and increasing the relevance of teacher professional development. In these rare cases, district leaders interested in transforming central office policy and practice have given their boundary spanners high levels of authority and decision-making power, which they have used to shift how the district views its role as a manager of schools.

ESSENTIAL INGREDIENTS

What does it take to succeed in this "dual citizen" role? District and charter interviewees listed the following attributes of successful boundary spanners:

- Humility and respect for district employees and structures
- Strong relationships with the charter community
- Political savvy and tolerance for conflict
- Skilled at change management
- Ability to see "shades of gray" on controversial topics
- Optimism and an eye for possibility

Strong relationships with charter leaders are essential. The charter community must view boundary spanners as credible allies. As Denver's Whitehead-Bust told us,

"Relationships matter tremendously ... people generally have high degrees of trust that my team is going to do what we believe is in people's best interest and is fair and reasonable. These jobs are inherently political and sometimes involve negotiating complex power dynamics. For that reason, relationships in the political sphere are useful and political savvy is essential, but it also seems to help a lot to have a thick skin." She added, "I have a very odd tolerance for conflict."

Boundary spanners relied heavily on their ability to see things from multiple perspectives. When a Denver charter network implemented mandatory summer school, Whitehead-Bust proposed a similar model for all district schools as a means to boost student achievement. District school leaders resisted and many felt that a requirement for summer school was just a way to push students out. Whitehead-Bust saw the opportunity for a “shade of gray in the middle.” In reality, mandatory summer school couldn’t work for every student in the district, but she believed it should be a remedy more schools consider. Whitehead-Bust thinks those opportunities to find middle ground exist “all the time, all over the place. I don’t think you could survive in this kind of work if you see things as right or wrong, black or white.” Boasberg, the superintendent that hired her, put it this way:

“You need to hire people who can work to get over, get around, or break through these ideological and sometimes systemic barriers that separate district-run and charter schools. I believe we in Denver have done this more forcefully and more successfully than most cities. It comes from a real sense that we are a community of public schools and that equity is our stake in the ground around which all of our systems evolve. So when there are questions of opportunity around resources, access to services for kids with disabilities, accountability for all schools, equity must be a stake in the ground around which all the work must orbit. When I hired Alyssa, I wanted someone to be very strong on this point.”

The challenge of working through bureaucracies requires its own particular set of skills which boundary spanners do not always possess. The personality traits that enabled boundary spanners to navigate what many described as frustrating bureaucracies were humility coupled with the ability to listen and respect other views and experiences. Boundary spanners need to be aware that they are coming in as a perceived outsider and that people will likely feel defensive and suspicious about working with them. Getting past that will take time, patience, and sensitivity to those fears. Elliott Witney was well valued for these attributes and for his expertise in the charter realm. Superintendent Klusmann described a conversation with Elliott:

“Elliott came to me and said, ‘I think I’m starting to be known as the ‘charter guy.’ Yet he’d already been there a year and a half. I said, ‘Elliott, you were hired to be the charter guy. Go do it. Go have fun with it. [Laughs] That’s what you’re here for. Don’t let people not know you’re the charter guy.’ So it was funny but he’s very aware of that. He tries to balance it.”

Over time, Witney worked directly with principals and by all accounts, won most of them over. Klusmann was able to quell other central office rumbblings because he knew the principals were happy with Witney and the changes he was making. Many administrators in Spring Branch came to respect what they saw as Witney’s genuine efforts to connect with people and to support both district and charter schools. An especially small but meaningful gesture was the fact that Witney took care to bring charter people to see Spring Branch ISD schools, not just the charters. This made a difference in building credibility and respect within the district. Those efforts, plus an open personality, won over one seasoned administrator who said, “[Elliott] looks at things in a very positive manner. He looks at possibility. He goes after opportunities and makes connections with people. At first, some people were like: ‘Oh my God, who is that young whippersnapper?’ He’s earned incredible respect from the campus leaders and everybody. He’s a mover and shaker and he’s made some people uncomfortable, but I love it. I think it’s great, honestly. There’s that old saying that sometimes the best ideas come from somebody outside the system. So I would say he exemplifies that because he’s brought a lot of new ideas.”

Some district administrators, include Denver’s Boasberg, stressed, however, that direct charter experience is not a requirement in order to succeed as a boundary spanner. Boasberg and others said that there were many skills they prioritized above experience working in the charter field, including the ability to think outside the box, to challenge the status quo, and to be driven by a sense of urgency around the work. Boasberg explained that Whitehead-Bust’s bridge-building and commitment to equity across sectors were far more important hiring criteria than her charter background:

“It’s great that charters are willing to think outside of the box, challenge the status quo and I look for that quality from whomever we hire, whether or not they come from the charter

sector. These skills are not charter sector specific skills. When we look at internal candidates who have been principals, for example, we look for ones who have run schools in a way that challenge the status quo.”

Superintendent Klussmann was aware of and encouraged by how other districts were starting to import charter leaders and blend worlds, yet his interest in Witney was based more on Witney’s skills than his charter experience: “This is a really sharp guy and I think he’d be good in our system and we need someone like that.”

SUPPORT FROM THE TOP

Even the most politically skilled and humble people, however, cannot be successful in this role without help from their bosses and peers. They will struggle to deliver on the basic task of managing relationships with charter partners. They will also certainly fail with more onerous goals, like helping to transform the broader school system. They will become frustrated and leave or will be driven out by hostile peers.

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To ensure that they can accomplish the difficult work of building bridges, brokering change, and contributing to innovation, equity, and excellence, boundary spanners need authority and a direct line to the superintendent. In Spring Branch, there was pressure to have Witney report to the superintendent through a department head. Klussmann resisted, worrying that Witney would be “consumed by the system.”

Boundary spanners need peers and political support within the central office. Klussmann said he tried to be a sounding board for Witney and Davis, but also a sounding board for the rest of the staff, “so that the things that are happening are not underground.” Klussmann also made sure that Witney developed a strong relationship with the district’s board so they would understand and support his role. This was strategic and with an eye toward sustaining the work underway. Klussmann retired after the 2014–2015 school year and believes that a deep connection between Witney and the school board increases the odds that Witney survives the leadership transition.

We also heard from superintendents that it is unrealistic and unwise to expect that one person alone can infuse the central office and the schools with a new approach. They spoke of the importance of creating a critical mass of such people or at least pairing boundary spanners with experienced “insiders” who can help them navigate the system.

Denver’s Boasberg described the necessary steps towards success:

“Most importantly, find the right person, strongest candidate, not someone who has a specific idea of education delivery ... If you hire someone from outside the sector and expect them to carry the weight of being the bridge, that will set them and the district up for failure. They must be placed within a context that ensures success. DPS has a long history now of working with the charter sector and embracing schools with different governance types. Alyssa and others have stepped in to that work. We did not hire her expecting her to be the bridge alone.”

Whitehead-Bust, too, expressed the view that she could not do the work she was doing without a broader commitment to cross-sector solutions in Denver and a shared platform in the city.

“We (charter and district leaders) all share a belief that this is going to be an outside-in, inside-out change endeavor if we’re actually going to make a difference for kids.”

Conclusion

Boundary spanners have the potential to bring together the best ideas from the charter and traditional school worlds. Most urban districts now have significant numbers of charter schools in their midst. Whether the district sees charters as collaborators or competitors, under the right conditions hiring staff with charter experience can help resolve tensions, create meaningful district-charter collaboration, and bring new entrepreneurial mindsets and ideas to the difficult work of school district reform, especially in districts that want to encourage all schools to have the same level of autonomy and accountability.

Boundary spanners play a pivotal role in bridging charter and district interests. In fact, it's hard to imagine cross-sector problem-solving initiatives succeeding without someone playing this role. We found that boundary spanners used their experience in, and connection to, the charter sector to

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act as a translator and conduit of information for the district. Boundary spanners we interviewed all patiently helped both sides see the other's perspective and worked to cultivate trust and shared interests. They possessed humility, were viewed as credible allies by both sides, and held allegiance to principles (like autonomy and urgency) rather than sectors. In many cases, they also acted as internal agitators, negotiators, and advocates within the district.

Most remarkably, some of these leaders have spurred conversations within the central office using an outsider's perspective to contrast a district's modus operandi. They have

successfully pushed for greater levels of school autonomy, the adoption of common enrollment systems, the practice of district and charter school co-location, and increasing the relevance of teacher professional development. In these rare cases, district leaders interested in transforming central office policy and practice have given their boundary spanners high levels of authority and decision-making power which they have used to shift how the district views its role as a manager of schools.

At the same time, the boundary spanner often is a square peg in a round district hole. District staff can be distrustful and even hostile to the outsider. Over time, charter employees can come to see their former colleague as a turncoat. The pace of change can be maddeningly slow for someone used to the fast and nimble charter sector.

For these reasons, districts should take care when hiring and training someone in this role. They should:

- Hire for the right personality and skill set.
- Give them authority and a direct line to the superintendent.
- Prep them for district culture (e.g., how decisions are made, what communication styles are valued, history and appreciation of the previous work).
- Make sure they're not isolated and assign a mentor who is well respected by peers.
- Announce the boundary spanner's role and responsibilities, help provide clear intentions and political cover.

Given the challenges in delivering an excellent education to all students, district-charter collaboration should be a foregone conclusion.

With the right amount of planning, patience, and support, boundary spanners can be successful in bringing new ideas to districts and fostering strong relationships between districts and charters, helping to make education a true citywide endeavor.