Bringing Coherence to Multistate Charter Leadership: A Collective Case Study

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Abstract

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Multistate networks are arguably the purest expression of the charter sector's original promise as an engine of innovation within the public school system. On its face, this contention may appear somewhat counterintuitive; the proliferation of schools affiliated with charter management organizations (CMOs) that have siphoned market share away from standalone, community-based operators is often faulted for bringing homogeneity to a corner of the education landscape that once valorized pluralism. Replicating networks that expand their proven models into more than one state, however, are subject to divergent policy landscapes, operational conditions, and community expectations. Accordingly, in order to comport with the dictates of discrete sets of external demands, the leaders of multistate networks necessarily preside over a rolling set of limited experiments through which they are able to assess the relative efficacy of varying approaches to educating students. With the public policy and private philanthropic incentive structures continuing to tilt in favor of replication, and with multistate operators generally struggling to match the success of their more geographically compact peers, it is imperative that leaders of these unique organizations understand how to meet the needs of their communities while simultaneously cultivating the sense of collective mission that promotes effective operation.

This collective case study explores how the leaders of five multistate networks attempt to create coherence within their organizations notwithstanding these materially different environmental conditions. Data from interviews, observations, and artifacts were triangulated,

and the resulting analysis revealed commonalities, distinctions, and trends that illuminate how these leaders navigate the barriers that imperil the creation of coherence within the multistate construct. This study assesses the leadership moves that the chief executives of multistate networks make when attempting to create coherence and proposes a novel categorization scheme that classifies these strategies as either ideological, structural, or interpersonal in nature. This study also provides a composite picture of the successful multistate charter leader by synthesizing the key attributes possessed by the study participants, explaining how they exercise humility and finesse while using the serial experimentation compelled by the multistate framework to seek out opportunities to drive continuous improvement throughout their networks.

Examined through a conceptual framework that ties together the literature on coherence in educational organizations and charter school replication, these findings demonstrate how multistate leaders engage stakeholders based in their satellite regions in a dynamic process of calibrating the appropriate fit between network model and local conditions. Implications from this study are relevant to the policymakers and funders who have continued to provide regulatory and financial support to operators undertaking interstate expansion efforts, to the current and prospective leaders of multistate CMOs who are being entrusted to create high-quality learning environments for students in far-flung communities, and to the superintendents of traditional public school districts who can draw lessons from the manner in which this study's participants are consistently experimenting, evaluating, and adapting.

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Dedication

To Nicole and Norah —

For your bottomless good humor, energetic daily companionship,

and full-throated encouragement to pursue any taxing, multi-year endeavor

that could conceivably result in a decent family photo.

Chapter 1: Introduction

In their initial conception, public charter schools were framed as laboratories of innovation that would use their heightened autonomies to pilot novel practices that could be disseminated to the traditional public school system (Carpenter, 2008). Charter school proponents initially envisioned local leaders and educators availing themselves of curricular, operational, and budgetary autonomies to craft educational models responsive to the needs of their communities (Farrell et al., 2014). Beset by significant operational and financial challenges, however, standalone, community-based schools struggled to effect change on a systemic level (Farrell et al., 2014; Wohlstetter et al., 2011). Accordingly, policymakers, funders, and market forces have conspired to catalyze the growth of nonprofit charter school management organizations (CMOs) that provide instructional and operational support services to networks of schools that share common missions and models (Farrell et al., 2012).

As of 2016–2017, over one-third of America's charter schools were affiliated with either a CMO or an educational management organization (EMO) (David, 2019; Woodworth et al., 2017). Whereas EMOs, which are structured as for-profit vehicles, may find the needs of their educational programs to be in tension with the demands of their investors, CMOs are mission-driven organizations whose revenues must be used to support their charitable purposes (Roch & Sai, 2015). Over the past several years, as the fractious educational policy coalition within the Democratic Party has coalesced in opposition to for-profit charter operators, these EMO-affiliated schools have fallen out of favor (Barnum, 2017a). CMOs, however, have continued to expand apace as a growing body of research suggests that prioritizing the growth of "proven" charter operators may be an effective strategy for accelerating the creation of high-quality public

school options (Cohodes et al., 2021; Wohlstetter et al., 2011). A 2015 survey of CMO leaders administered by the National Alliance for Public Charter Schools indicated that nearly half had "existing plans to expand to a new state," while nearly 80% of respondents evinced a willingness to expand to a new state within a 10-year timeframe (National Alliance for Public Charter Schools, 2016a).

For charter replication to be a viable strategy for enhancing the caliber of a community's public education landscape, expanding networks must maintain their quality when operating in new settings and when working with different stakeholder groups (Cohodes et al., 2021; Walters, 2018). With that in mind, CMO leaders attempt to maintain quality while scaling by (1) developing and sustaining the internal capacity to support high-quality growth (Higgins & Hess, 2009; Horsford et al., 2018; Torres, 2016a, 2016b; Wilder & Jacobsen, 2010); and (2) striking an appropriate balance between standardization and responsiveness to local policy landscapes, operational conditions, and community expectations (Feit et al., 2020; Glazer et al., 2019; Peurach & Glazer, 2012; Wilson, 2016).

Despite congenial policy frameworks and supplemental funding streams earmarked for growing networks, however, CMOs routinely struggle to match their initial successes when transplanting their models into new settings. New campuses may fail to approximate the quality of their progenitors; Peltason and Raymond (2013) found that roughly two-thirds of CMOs "start new schools that are of the same or slightly better quality as the existing portfolio" (p. 6). Critically, CMO central offices responsible for providing the shared instructional and operational services that make replication and its attendant economies of scale attractive in the first place often lack "the capacity necessary to keep pace with their organizational needs" as the network scales up (Farrell et al., 2014, p. 87; Gleason, 2017).

The challenges inherent in maintaining quality while growing are felt more acutely within

multistate CMOs. Within traditional school systems, geographic proximity ensures that both

"hub" and "outlet" are largely subject to the same set of policy considerations, operational

requirements, and community norms. Within the CMO paradigm, however, individual schools

may encounter materially different environmental challenges (Peurach & Glazer, 2012). As a

central office executive at a multistate CMO explained,

> If you think about one of the assets to a network is that you are able to build systems,
> you're able to create consistency and outcomes, our folks get trained and compensated in
> the same way, we assess our kids the same way, we have curriculum that's standardized
> across the network. If there are lots of individual requirements from the authorizers and
> other regulatory agencies, that can complicate the assets of a national network. (Prothero,
> 2014)

Thus, the leaders of multistate networks must deal with added layers of complexity when

attempting to negotiate the tension between operational efficiency and dynamic adaptation to

external conditions that invariably tests the leaders of charter networks (Bulkley, 2005; Honig &

Hatch, 2004; Wohlstetter et al., 2015). As a result, CMOs that are "successful with one particular

population or in one location ... may become overextended and underprepared for the challenges

that arise with new schools in new locations" (Wohlstetter et al., 2015, p. 126). Ominously,

Wohlstetter et al. (2011) cautioned that CMOs expanding too quickly are "train wrecks waiting

to happen" (p. 173).

Reconciling the need for common systems, terminology, and philosophy with the discrete

political environments, operational requirements, and stakeholder needs in the communities in

which a network operates poses significant challenges for the leaders of multistate CMOs. This

study addresses a gap in the literature by exploring how these leaders attempt to focus direction

and cultivate collaborative cultures within their organizations notwithstanding the materially

different conditions that characterize the communities in which their schools are located.

Statement of the Problem

A powerful combination of internal forces and environmental factors has catalyzed the growth of charter management organizations that provide instructional and operational support services to networks of schools that share common missions and models. Multistate networks are acutely susceptible to the challenges inherent in replication, and they frequently struggle to sustain quality as they expand (Woodworth & Raymond, 2013). Faced with geographical barriers, divergent policy regimes, and idiosyncratic community expectations, the leaders of multistate CMOs may struggle to develop the shared mindsets and collaborative cultures necessary to effect sustained change.

The stakes are high. When these leaders succeed, they are able to offer families—overwhelmingly those concentrated in communities whose educational outcomes have historically lagged behind those in more affluent neighborhoods—access to high-quality public schools. Conversely, when successful networks cross state lines to open new schools that do not rival the quality of their existing portfolios, the results redound to the detriment of students and families as research suggests that these schools may produce academic outcomes inferior to the ones on which they are modeled, crowd out operators that might be more sensitive to local needs, and compromise the quality of existing network schools by diluting resources that were previously dedicated to their successful operation (Peltason & Raymond, 2013; Wohlstetter et al., 2015; Woodworth & Raymond, 2013).

Purpose of the Study

The purpose of this study is to explore the manner in which leaders of multistate charter networks navigate the disparate policy landscapes, operational conditions, and stakeholder expectations that characterize the communities in which their schools are located.

Research Questions

(1) How do the leaders of multistate charter networks navigate the disparate policy landscapes, operational conditions, and stakeholder expectations that characterize the communities in which their schools are located?

(2) How do the leaders of multistate charter networks attempt to create coherence within their organizations?

Significance of the Study

This study presents an opportunity to explore a topic that receives short shrift in both the academic literature and the public consciousness relative to its importance in today's public education landscape. Leaders of multistate charter networks occupy unique terrain within America's public education system. With the first charter-enabling statute having been enacted less than 30 years ago, the charter sector remains in its relative infancy. Nonetheless, as the sector has matured and intra-sector distinctions have become more pronounced, scholars have explored the differential approaches adopted by the leaders of standalone schools, network-affiliated campuses, and CMO headquarters in a number of key areas including the roles and responsibilities of teachers (Roch & Sai, 2017; Torres, 2014, 2016a, 2016b, 2016c); control over campus-level decision-making (Bulkley, 2005; Bulkley & Hicks, 2005; Roch & Sai, 2015); and the manner in which leaders are sourced and prepared (Higgins & Hess, 2009; Torres et al., 2018). According to a 2016–2017 census published by National Alliance for Public Charter Schools, 30 CMOs operated campuses in more than one state (David, 2019). Nearly 320,000 students—or 11% of the roughly 3 million students enrolled in charters nationwide—attended a school affiliated with a multistate network (David, 2019).

The body of research on CMO leadership in the context of multistate networks remains scant. Notably, however, the literature does suggest that CMO leaders systematically underestimate the impact of geographical dispersion on their operations; in a 2015 survey, respondents ranked "proximity to other schools in network" as a less important consideration than all other options (including regional donor support, inadequate educational options, and large student populations) when assessing the importance of various regional factors in their expansion decisions (National Alliance for Public Charter Schools, 2016a). Relatedly, evidence suggests that CMO leaders have historically neglected to prioritize parent and community engagement, with survey data from a 2010 study indicating that "providing community outreach training" was ranked as a "very important" CMO central office function by the lowest percentage of respondents (Lake et al., 2010). With the public policy and private philanthropic incentive structures continuing to tilt in favor of replication, and with multistate operators generally struggling to match the success of their more geographically compact peers, it is imperative that leaders of these unique educational organizations understand how to meet the needs of their communities while simultaneously cultivating the sense of collective mission that promotes effective operation. Accordingly, this exploratory case study contributes to our understanding of how educational leaders confronted with the daunting challenge of running multistate charter networks can improve their practice.

Moreover, the manner in which the leaders of multistate networks are compelled to view each directly operated region as a functional lab of experimentation can offer lessons in running learning organizations to leaders of traditional school systems. By virtue of having to adapt certain elements of their program—whether the courses they offer, the manner in which they support students with disabilities, the manner in which their governing bodies are constructed, or

even the extent to which they adopt stringent health and safety protocols in response to public health crises—to suit different operational environments, the leaders of multistate networks are routinely and systematically afforded opportunities to evaluate the relative benefits and drawbacks of different programs. To the extent that some novel design element initially compelled by regional circumstances is seen as having a positive impact on students, it can be used to inform programming at other sites. While the leaders of traditional school systems are seldom placed in the position of having to run pilots based on one or more of their schools being subject to a different set of laws and regulations, they can draw lessons from the manner in which this study's participants are consistently experimenting, evaluating, and adapting.

Personal Interest

During the 2016–2017 school year, I worked simultaneously as the Chief of Staff for a multistate charter management organization and as the interim executive director of a network-affiliated school in a satellite region. The principal reason for our growth as a network was the fulfillment of our mission. We had data—including quasi-experimental studies from third-party researchers—that showed our model to be effective in driving educational outcomes for low-income students of color, and we strove to increase the number of high-quality seats available to families looking for options beyond their zoned schools.

As a network leader, I understood that an incidental benefit to growth was the achievement of economies of scale. To the extent that each new site required an entirely new set of policies, systems, and instructional materials, however, those economies of scale were elusive. As a result, administrative ease often clashed with questions of equity like, "What does this specific community actually need in order to operate the best possible school?"

As a school leader, however, I became increasingly aware of the gap between the network's model as conceived and the extent to which its adaptation to a new setting was perceived to be successful by educators, families, and students in that region. Curricular materials were imperfectly aligned with state standards and exam formats. Cultural expectations based on experiences with students and families in one community were ill-suited to the stakeholders in another. And the institutional rigidity that occasionally characterized the central office's response to proposed adaptations seemed—to those on the ground—to signify the ultimate triumph of standardization over nimbleness. The upshot was intense and often unyielding local resistance among both educators and families who largely considered the central office to be incapable of implementing a program that would truly and authentically address their needs.

Having experienced this phenomenon from both the central office and the regional perspective, I was drawn to explore how other leaders grappling with this thorny array of challenges were attempting to fashion coherent school systems. As both a practitioner and a researcher, I was eager to study how these educational leaders were thinking through some of the situations I had found particularly vexing. Moreover, the realities of pandemic-era school administration seemed to present a paradigmatic example of the challenges inherent in operating a multistate school system, as leaders strained to preserve institutional coherence while adapting to each constituent state's policies, politics, and community norms around reopening, masking, and vaccine mandates. Conducting this study after having been both the bearer and the recipient of fraught interstate policy communications afforded me an opportunity to better understand how leaders in this unique position conceive of their roles, structure their decision-making processes, and message their choices.

Conceptual Framework

Effective educational organizations are characterized by coherence. Leaders strive to cultivate institutional alignment, shared mindsets, and commonality of purpose to drive the pursuit of their system's overarching goals. For leaders of geographically non-contiguous school systems, however, efforts to cultivate a distinct system-wide identity may come into conflict with regional exceptionalism as expressed through formal policies and informal norms. Fullan and Quinn's (2016) Coherence Framework offers a lens through which to observe the actions of educational leaders who guide their organizations through successful change efforts. Accordingly, it has particular salience within the context of multistate CMOs that have frequently struggled to maintain quality while replicating.

Fullan and Quinn (2016) argue that educational leaders bring coherence to their organizations by seizing on four "drivers" of sustained systemic improvement: (1) focusing direction; (2) cultivating collaborative cultures; (3) securing accountability; and (4) deepening learning. To focus direction, a leader must be purpose-driven, articulate impactful goals, adopt a clear strategy, and engage in change leadership (Fullan & Quinn, 2016). Avoiding fragmentation and the specter of "initiativitis" that often foments resistance to change efforts requires leaders to set a small number of ambitious goals and to create a clear strategy for pursuing them (Fullan & Quinn, 2016). To create collaborative cultures, a leader must foster a sense of shared purpose and cultivate trust through deep relationships, authentic engagement, shared leadership, and a commitment to collaborative inquiry (Fullan & Quinn, 2016).

This study focuses primarily on the first two drivers instantiated in Fullan and Quinn's (2016) Coherence Framework (i.e., focusing direction and cultivating collaborative cultures), as the literature suggests that those features of coherent educational organizations are particularly

challenging to achieve in the multistate context. Focusing direction becomes exceedingly difficult when external policy demands differ across campuses. Creating collaborative cultures poses challenges when physical separation and unbridged ideological divides impede the development of shared mindsets and erode trust.

State actors and private funders have made significant bets on "proven" charter operators replicating their models in some of America's most historically underserved and disenfranchised communities. Students and families are relying on these schools to furnish high-quality, responsive educational opportunities. Educators are counting on these networks to make their individual efforts more purposeful. Accordingly, the ramifications of these networks struggling to maintain coherence in their operations are particularly troubling.

Summary of the Methodology

Because this study was designed to investigate and critically analyze the experiences of multistate charter network leaders as they attempted to focus direction and cultivate collaborative cultures, I elected to conduct a qualitative case study with the level of analysis being the multistate charter network. The collective case study methodology centered the perspectives of the stakeholders charged with navigating the assorted challenges that can impair an organization's efforts to operate effectively in more than one state. Soliciting the perspective of multiple leaders of multistate charter networks enriched the study by illuminating the similarities and dissimilarities of both the challenges these leaders have faced when attempting to bring coherence to their organizations and the approaches they have taken to focus direction and create collaborative cultures. The sample for this study was the universe of multistate charter networks (i.e., networks that directly operate schools in more than one state). Non-random selection of five study participants who represented a range of characteristics (e.g., geography, network age and

size, tenure as CEO) within the target population ensured inclusion of a range of perspectives and permitted comparison of findings across settings and contexts.

Data for this study were collected from a host of sources. Semi-structured elite interviews were conducted with both the chief executives of the five multistate networks that participated in the study and with administrators based in each of those networks' satellite regions (i.e., regions in states other than the one in which the network nerve centers are located). These interviews elicited information about the leaders' backgrounds, their experiences operating schools in multiple states, and their efforts to bring coherence to their respective organizations. The majority of these interviews were conducted in-person and took place within the CMO leaders' expansion regions. One of the five networks did not permit visitor access during the study period; accordingly, interviews with that network's national and regional leaders occurred over the phone. Meeting the CMO leaders in their satellite regions allowed me to observe how they interacted with teachers during morning huddles, principals during classroom walkthroughs, and board members during retreats. I also observed multiple virtual board meetings in which the national leader addressed the governing body of a regional school.

In addition to the interviews and observations, I reviewed documents including charter applications; network policy manuals; expansion greenlighting criteria; board retreat presentations; management agreements (i.e., contracts for CMO support services); and observation protocols used by central office personnel during campus visits. Triangulating data from the literature review, observations, artifacts, and interviews strengthened the validity of the classification system used for coding purposes in this study and enhances the credibility of the study's findings (Fraenkel & Wallen, 2006; Schreiber & Asner-Self, 2011).

Limitations

This study focuses exclusively on the challenges confronting the leaders of multistate charter networks, a comparatively small (though influential and growing) subset of all educational leaders. Accordingly, this study is delimited to a specific sample population whose perspectives have historically not been centered within the academic literature. Moreover, the limited nature of the observation windows as well as the restrictions on in-person access imposed by Covid-19 health and safety protocols may have resulted in collected data that were not representative of how the CMO leader ordinarily engages when visiting an expansion region.

Definition of Terms

Case study: A case study is an in-depth exploration of an organization or individual (Schreiber & Asner-Self, 2011).

Charter authorizer: A charter authorizer is an entity "charged by law to approve new schools, monitor their compliance with applicable laws and regulations, and evaluate their performance to make decisions about charter renewal and closure" (U.S. Department of Education, 2007).

Charter management organization (CMO): A CMO is a nonprofit organization that operates or manages a network of charter schools by providing centralized support, operations, and oversight (20 U.S.C. § 7221i(3)).

Charter school: A charter school is a publicly funded, tuition-free, independently operated school of choice that receives exemption from certain state and local regulations in exchange for its adherence to the terms of a written performance contract with its authorizer.

Charter school network: A charter school network is a collection of CMO-affiliated charter schools that share a common mission, model, and central office infrastructure. Within this dissertation, the terms "CMO" and "charter school network" have identical meanings.

Charter operator: A charter operator is the entity (i.e., either a CMO or the board of a standalone charter school) responsible for managing a charter school.

Coherence: In this dissertation, coherence refers to the extent to which a system is characterized by organizational alignment, shared mindsets, and commonality of purpose.

CMO chief executive / network leader: The chief executive of a CMO is the leader of that organization's central office administration. Within this dissertation, "CMO chief executive" and "network leader" are used synonymously.

Educational management organization (EMO): An EMO is a for-profit entity that operates or manages a network of charter schools (Woodworth et al., 2017).

Flagship region: A CMO's flagship region is the one in which its model originated and its nerve center is located.

Multistate charter school network: A multistate charter network is a network that directly operates schools in more than one state.

Proven provider: A proven provider is a charter operator deemed by an authorizer to qualify for preferential regulatory treatment or designated supplemental funding streams on the basis of having a demonstrated track record of academic, operational, and fiscal success at its existing campus(es).

Regional administrator: In this dissertation, the term regional administrator refers to the lead person based in a multistate network's satellite region.

Replication: Replication occurs when an existing charter operator opens a new campus based on its existing model (20 U.S.C. § 7221i(9)).

Satellite region: A satellite region for a CMO is a campus (or collection of campuses) in a state other than the one in which the network's nerve center is located. Within this dissertation, the terms "satellite region" and "expansion region" share similar meanings.

Standalone charter school: Colloquially referred to as "mom-and-pop" charter schools, standalone charter schools are independent and autonomous charter schools that are not affiliated with either a CMO or an EMO.

Chapter 2: Literature Review

Introduction

In a national study that included 167 CMOs operating 1,372 schools, Woodworth and Raymond (2013) found that "CMOs that operate in multiple states had much weaker student growth than those CMOs that had more geographically concentrated networks" (p. 23). When the study's authors speculated as to why the multistate operators tended to struggle relative to their less geographically disparate peers, they proffered two possible explanations: either (a) multistate networks require "more complex administration to deal with inconsistent regulatory environments"; or (b) "the sheer impact of distance might introduce greater challenges for interaction, staff development, quality assurance or other network-wide practices" (p. 22). Put another way, multistate networks struggle to maintain the coherence necessary to operate effective school systems with consistency and reliability.

Operational complexity has profound implications for students and families. Nevertheless, a powerful combination of internal forces and environmental factors has driven CMOs to scale up their operations. With demand for seats at popular schools often exceeding the enrollment ceilings enshrined in operators' charter agreements, mission imperatives may compel a network to launch additional campuses in order to satisfy unmet parental demand for access (David & Hesla, 2018). Moreover, from an operational standpoint, the resource constraints that prevent standalone schools from pursuing their missions sustainably have led to the centralization of back-office services that afford greater economies of scale (Torres et al., 2018; Wohlstetter et al., 2011).

Exogenous considerations that have contributed to the growth of CMOs encompass those promoted by both governmental bodies and private actors. From a public policy standpoint, federal, state, and local governments have offered financial inducements, created streamlined administrative processes, and provided regulatory relief to encourage experienced charter school operators to replicate their models at new campuses (Cohodes et al., 2021; Farrell et al., 2012). And from a philanthropic standpoint, funders intent on maximizing the perceived social returns on their investments and mitigating the risks associated with supporting unproven models have shifted their grantmaking priorities away from new entrants into the educational marketplace and toward established organizations pursuing growth (Farrell et al., 2014; Wohlstetter et al., 2011).

The process of creating coherence within educational organizations requires "continuous participation" by central office and campus-based leaders in a collaborative and ongoing effort to calibrate goals and strategies that respond to a complex web of external demands (Honig & Hatch, 2004, p. 19). In the multistate context, central office leaders are often confronted with having to reconcile the standardization that ordinarily permits efficient operation with the dynamic adaptation to external conditions that coherence demands (Honig & Hatch, 2004; Wohlstetter et al., 2015). This literature review explores the internal forces and environmental factors that have driven CMOs to scale up their operations.

Research suggests that prioritizing the growth of "proven" charter operators may be an effective strategy for accelerating the creation of high-quality public school options (Cohodes et al., 2021; Wohlstetter et al., 2011). The viability of this strategy hinges on growing networks maintaining their success in new settings (Cohodes et al., 2021; Walters, 2018). Notably, Cohodes et al. (2021) find that strict adherence to a network's model increases the likelihood of successful replication. Taking heed, state officials attempting to lure charter networks to open

schools in their communities occasionally require assurances that such networks "will largely be replicating the program established at the existing school(s) in other states, including the curriculum, with slight modifications" (DC Public Charter School Board, 2018, p. 9).

Alongside these external considerations that militate in favor of faithful model replication in expansion campuses, charter networks have compelling internal organizational justifications for prioritizing uniformity. Standardization allows CMOs to scale effectively and efficiently (Cohodes et al., 2021; Torres, 2014). Networks attempt to control for potential volatility in school quality by institutionalizing policies and practices and by building out structured leadership development programs that ensure all campuses share a common instructional, cultural, and operational orientation (Gleason, 2017; Torres et al., 2018; Wohlstetter et al., 2015). Whereas the leaders of standalone schools are frequently put in a position of having to fashion their own self-directed professional learning programs, CMOs view intentionally designed pre-service and ongoing support to school leaders as investments in network quality and sustainability (Gawlik, 2015; Torres et al., 2018).

The remainder of this chapter is structured as follows. First, I review the internal considerations and environmental factors that incentivize charter school networks to expand. Next, I examine the challenges that CMOs face when attempting to scale their models, paying particularly close attention to the difficulties encountered by multistate operators. Then, I explain how effective educational leaders attempt to create coherence in their operations and why creating coherence in multistate organizations poses a unique leadership challenge. Finally, I explore the ramifications of multistate charter operators struggling to repeat their initial successes when expanding into new settings.

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The Rise of Charter Networks

The convergence of charter school models and the proliferation of charter networks has not been an accident of history. These trends can be attributed to a host of factors including parental demand for seats at established schools, operational efficiencies attendant to scale, public policy frameworks that facilitate replication, and the predilections of funders whose philanthropic support often determines the viability of a school's financial model. In this section, I first explore the internal considerations that prompt charter school operators to consider expanding their models before turning to the environmental factors (both public and private) that increase the feasibility of such expansion efforts.

Internal Considerations

Charter operators commonly invoke mission imperatives when articulating a rationale for expansion. Operators that maintain lengthy waitlists frequently express a moral obligation to grow in order to redress the disparity between demand for access to their educational offerings and the extant enrollment caps imposed by their oversight bodies (Pondiscio, 2019). From an administrative standpoint, standalone schools that lack access to central office infrastructure are acutely susceptible to existential financial and organizational hardships that may ultimately lead to a charter being non-renewed or revoked (Wilkens, 2013). As a result, schools may attempt to generate economies of scale "by attracting progressively larger student bodies" (Holyoke, 2008, p. 305). Teresa and Good (2018) have argued that the "need to secure capital financing to grow shapes the behavior of charter schools and charter management organizations (CMOs) in ways that are obscured by simple stories of parent demand" (pp. 1108–1109).

Farrell et al. (2014) have proposed a useful tripartite typology that categorizes charter operators by their approaches to growth. CMOs whose growth is "premeditated" use well-

defined planning and management activities to pursue clearly articulated, long-range objectives (Farrell et al., 2014). CMOs that grow "organically" refine their expansion plans in response to changing pressures, demands, and circumstances (Farrell et al., 2014). And networks that grow "opportunistically" base their expansion plans exclusively on the availability of key resources including funding, facilities, talent pipelines, and community support (Farrell et al., 2014). Thus, while some scholars have attempted to classify charter schools along a two-dimensional continuum that ranges from "mission-oriented" to "market-oriented" (Holyoke, 2008), it is important to note that operators' motivations for growth frequently confound this clean dichotomy. CMOs motivated principally by the need to satisfy unmet parental demand may have ancillary operational motivations while those animated chiefly by the need to attain administrative efficiencies may too have legitimate mission-related reasons to grow.

Environmental Factors

Policy considerations at the federal, state, and local levels also help explain both why charter operators attempt to transplant their models into new states and why they often struggle to replicate the successes they had in their communities of origin. Successful charter school operators confront pressure from both policymakers and private actors to replicate their models with a measure of urgency (Farrell et al., 2014; Wohlstetter et al., 2015). Policymakers create the conditions under which charter operators are incentivized to grow by pulling an assortment of statutory and regulatory levers and by making supplemental revenue streams accessible to cash-strapped organizations. Philanthropists and "intermediate organizations" have the potential to act as "quasi-policymakers" by aligning stakeholders and resources in support of their preferred reform strategies (DeBray et al., 2014, p. 202). The manner in which public and private actors promote charter replication is explored below.

Public Policy—Statutory and Regulatory Landscapes

Federal Policy. Although charter schools are principally creatures of state law, federal policy plays a key role in shaping the composition of the country's charter school landscape. On the statutory side, policies that address the manner in which schools will be held accountable for student outcomes and the qualifications of educators teaching in schools that receive federal entitlement grants influence the manner in which charter networks approach replication (Farrell et al., 2012). For example, before No Child Left Behind (NCLB) was superseded by the Every Student Succeeds Act (ESSA), federal law superimposed an additional educator credentialing requirement in the form of the "highly qualified teacher" (HQT) provision. For charter operators that may have been exempt from a state's licensure system at the time of NCLB's enactment, HQT created a layer of bureaucracy that constrained a key component of their autonomy (Driscoll, 2003). Consequently, federal law compelled operators contemplating interstate expansion efforts to consider whether their staffing models would translate into new regulatory environments that placed more stringent restrictions on their hiring practices.

In 2022, the Biden Administration published a Notice of Proposed Priorities (NPP) in connection with an impending round of the Charter Schools Program (CSP) grant competitions (U.S. Department of Education, 2022a). The NPP included provisions that would have required grant-seeking entities (including charter operators seeking to add new seats and state entities supporting new, expanding, and replicating charter schools) to furnish evidence of community need and to provide assurances regarding the demographic diversity of their likely student populations (U.S. Department of Education, 2022a). The publication of the NPP precipitated sustained and forceful pushback from charter supporters who argued not only that the proposed requirements were unwarranted and overly burdensome but that they would invariably lead state

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policymakers to modify their regulatory frameworks to comport with the new federal landscape

as shaped through the rulemaking process (Wolfe, 2022; Zimmerman & Moore, 2022). The

Notice of Final Priorities (NFP) addressed some of these concerns but largely left the new

requirements intact (U.S. Department of Education, 2022b). The NFP also formalized a series of

new requirements on grant recipients proposing to contract with a for-profit management

organization (i.e., an EMO) (U.S. Department of Education, 2022b).

State Policy. A multitude of state-level policies have contributed to the expansion of

existing charter models in lieu of untested alternatives. The National Association of Charter

School Authorizers (NACSA) (2009) has propounded a series of recommendations to state

policymakers geared toward "creating a climate where successful replication can thrive" (p. 4).

NACSA's recommendations include the elimination or modification of charter caps, the creation

of a streamlined authorization process for schools seeking to replicate, and the provision of

financial incentives for replicating networks (Field et al., 2014; NACSA, 2009). Over the past

decade, states have heeded these recommendations and—through the enactment of statutes and

the promulgation of regulations—have created the conditions under which interstate charter

replication can flourish.

As a threshold matter, the National Alliance for Public Charter Schools (2016b) critiqued

state laws for "fail[ing] to adequately capture the role of high-performing charter schools that are

replicating in their states" (p. 17) and encouraged authorizers to "ensure that only effective

governance models and high performing programs are rewarded with replication" (p. 31). Some

states in which charter growth is capped have created special carve-outs that allow schools with a

demonstrated "track record of improving student achievement" to expand notwithstanding

otherwise applicable enrollment ceilings (Dillon, 2010). In Connecticut, operators determined

"to have a demonstrated record of achievement" are permitted to apply for a waiver from otherwise generally applicable enrollment restrictions (Conn. Gen. Stat. § 10-66bb, 2018). In Michigan, however, a 2009 proposal to institute a formal "smart cap" failed to earn passage after charter supporters—ostensibly aligned in their belief that weak accountability would create a murky operational landscape in which a proliferation of bad actors would sully the reputation of credible operators—"could not agree on what success should look like" (Dillon, 2010; Zernike, 2016).

Massachusetts, which served as the setting for the charter replication study undertaken by Cohodes et al. (2021), precludes new operators from applying to open schools in academically underperforming, financially strapped districts (603 Code Mass. Regs. 1.04(4), 2022). In the Commonwealth, applications to operate "in school districts performing in the lowest 10% statewide and in which the 9% net school spending cap is or would be exceeded" may only be submitted by "proven providers" (603 Code Mass. Regs. 1.04(4), 2022; Angrist et al., 2013). To attain "proven provider" status, an applicant must demonstrate a multi-year track record of academic and operational success that includes absolute and comparative measures of proficiency and growth on state assessments; attendance, retention, attrition, suspension, graduation, and dropout data; and evidence of "effective" governance and financial management (603 Code Mass. Regs. 104(4)(b)-(c), 2022). Critically, an operator seeking a "proven provider" designation must also provide an assurance that "the program to be offered at the proposed charter is similar to, or represents a reasonable modification of the successful school" (603 Code Mass. Regs. 104(4)(d), 2022).

Moreover, a number of states have created streamlined application processes that are available exclusively to experienced operators seeking to open new schools or to expand

enrollment (Cohodes et al., 2021; Schwenkenberg & Vanderhoff, 2015). Given the existence of hard charter caps in many jurisdictions, these differentiated processes enable experienced operators to capture finite market share from standalone competitors who lack such preferred access. States adopting such policies signal to putative charter school founders that they should consider subsuming their unique visions under the larger umbrella of established networks looking to open new campuses.

In 2006, Arizona established a separate track for experienced operators in order "to streamline the application process for existing charters that consistently demonstrated quality academic and operational performance and financial viability" (Arizona State Board for Charter Schools, 2017). When issued, replication charters allow charter holders "to implement [their] existing educational program, corporate and governance structure, and financial and operational processes at a new charter school" (Ariz. Admin. Code R7-5-208(A), 2022). North Carolina's legislature has required its State Board of Education to adopt a "fast-track replication" process for "high-quality charter schools currently operating in the State" (N.C. Gen. Stat. Ann. § 115C-218.3, 2020). Missouri affords "high-quality" schools "expedited opportunities to replicate and expand into unaccredited districts, a metropolitan district, or [in Kansas City]" (Mo. Ann. Stat. § 160.408, 2018). And in Idaho, state statute directs charter authorizers to "establish policies regarding the criteria that will be considered when evaluating a petition for replication" (Idaho Code Ann. § 33-5205C(7), 2022). Intriguingly, and in contradistinction to comparable policies that prioritize fidelity of implementation over adaptation to new circumstances, Idaho requires operators replicating outside of their home district of origin to specify how they intend to "incorporate representation and input in the school operations from the local area where the

replication public charter school [will be] physically located" (Idaho Code Ann. § 33-5205C(7)(c), 2019).

A few states have gone further, crafting policies designed not only to facilitate replication of endogenous charter models but to induce outside operators to open schools within their territorial boundaries. Florida's "Schools of Hope" program (Fla. Stat. § 1002.333, 2022) exemplifies this approach (see also Wohlstetter et al., 2015). Under this policy, national charter operators that satisfy certain eligibility criteria are incentivized to open new schools in the immediate vicinity of "persistently low-performing schools" (Fla. Stat. § 1002.333, 2022). Notably, any organization that has recently received a grant through the United States Department of Education's Charter Schools Program (CSP) CMO competition automatically qualifies to serve as a "hope operator" (Fla. Stat. § 1002.333, 2022).

Similarly, Delaware permits only those "highly successful charter school operators" that have demonstrated "sustained high levels of student growth and achievement and sustained fiscal stewardship" to seek authorization to open a school in the instructional year immediately following the application cycle (Del. Code Ann. tit. 14, § 511, 2020). Critically, the plain language of the Delaware statute expresses agnosticism as to whether those predicate "highly successful" schools "are located or organized in Delaware" (Del. Code Ann. tit. 14, § 511(p), 2020). These policies are alluring to multistate charter operators who often base their "decision of where to grow ... on their estimation of a state law's friendliness" (Farrell et al., 2012, p. 513).

In 2012, the District of Columbia Public Charter School Board (PCSB) created a separate application track for "experienced and successful operators" (DC Public Charter School Board, 2012). The press release announcing the issuance of these new application guidelines included quotes from PCSB's board chair and executive director confirming that the chief rationale for the

adoption of this policy was to entice outside operators into the District. The PCSB's executive director stated at the time that the guidelines "streamline and accelerate the application process for charter operators who have successful track records in other cities across the country," and he explicitly encouraged "charter school organizations everywhere" to consider expanding into the District on account of its favorable operating climate (DC Public Charter School Board, 2012). Notably, in the body of the application itself, PCSB made clear its expectation "that experienced operators will largely be replicating the program established at the existing school(s) in other states, including the curriculum, with slight modifications for DC" (DC Public Charter School Board, 2018, p. 9). The upshot is that outside operators considering the DC market have historically been dissuaded from making material changes to their programs because state-level officials have determined that their safest bet is to import models conceived elsewhere and transplanted into the District without meaningful adulteration.

NACSA has called on legislators to "evaluate existing statutory provisions that influence the effectiveness and efficiency of cross-state governance" in order to create "a policy environment that facilitates expansion of high-quality networks across states" (Field et al., 2014, p. 11). Specifically, NACSA identified open meeting laws and local board membership requirements as policies that hinder effective multistate operation and praised Tennessee for amending its charter law in order to allow an out-of-state operator to satisfy its parent board member requirement by establishing local "advisory school councils" rather than a formal local governing body with fiduciary responsibilities (Field et al., 2014).

Local Policy. Municipal leaders of communities whose school systems are experiencing significant upheaval frequently prefer established operators over unproven commodities on account of the certainty they theoretically provide. The Providence Public School District in

Rhode Island was taken over by the Rhode Island Department of Education on November 1, 2019 (McGowan, 2019b). Consideration of how the district might be restructured while under state receivership inevitably inspired questions about whether charter operators would be invited to expand their presence in the city in order to furnish alternatives for students attending persistently underperforming schools. In anticipation of the state assuming control of city schools, Mayor Jorge Elorza went on record to endorse the expansion of one specific operator—Achievement First, which was founded in Connecticut but which has operated in Rhode Island since 2013—while lobbying the state to curtail the launch of new schools. Elorza told the Boston Globe that he was "concerned" that too many "new proposals for schools with no track record for success have been approved in recent years" (McGowan, 2019a). Elorza was quoted as saying he had exhorted state officials to "prioritize the expansion of proven charter schools" (McGowan, 2019a). In this fashion, local officials are positioned to place their proverbial thumbs on the scale in favor of established operators, even those whose model originated in another state.

Public Policy—Public Funding Models

From a financial standpoint, the federal government has incentivized charter replication by providing significant supplemental funding through the CSP program. Through the CSP program, the U.S. Department of Education makes competitive grant opportunities available both to state-level organizations (including State Education Agencies (SEAs) and nonprofit charter support organizations) attempting to catalyze the growth of high-quality charter sectors and to individual charter networks interested in replicating their existing models in new settings (National Association of Charter School Authorizers, 2019). Critically, these funding programs privilege known commodities over new models that might theoretically be more responsive to a

community's needs. During the 2019 CSP Replication and Expansion of High-Quality Charter Schools (CMO) competition, the Department of Education funded multiple applications from operators—including IDEA Public Schools, the Building the Future Education Collaborative, and the KIPP Foundation—that explicitly proposed opening grant-funded schools in multiple states (U.S. Department of Education, 2019).

Notably, upon ESSA's enactment, the CSP program underwent a meaningful shift as the federal government instantiated in law its preference for proven models over novice applicants. Prior to ESSA's authorization, CMO leaders seeking startup funding for new campuses opening under existing charters lamented a statutory prohibition on states issuing pass-through CSP subgrants to fund such replication (Farrell et al., 2012). National membership organizations picked up on this complaint and issued specific policy recommendations concerning this "one school, one charter" grant requirement that hamstrung efficient replication (Field et al., 2014, p. 13). Some observers noted a burgeoning schism within the charter sector as CMOs attempted to "use evidence of their quality to lobby federal policymakers to allocate money directly to CMOs, rather than individual charter schools" (Scott & Jabbar, 2014, p. 243). The shift toward prioritization of replication was among the biggest adjustments to the CSP program made under ESSA and was trumpeted by both Democratic politicians and center-right policy shops (Committee on Education & the Workforce Democrats, 2018; O'Leary, 2016). ESSA permits state entities to use CSP funding not only to facilitate the opening of "start-up" charter school campuses but also the replication and expansion of "high-quality" charter schools within their jurisdictions (20 U.S.C. § 7221b(b)(1)). Accordingly, states such as Texas have conditioned access to pass-through CSP replication funding on satisfaction of academic, operational, and financial quality standards (Texas Education Agency, 2019).

Private Interests

State funding formulas for public education have traditionally financed public charter schools at lower per-pupil reimbursement rates than the traditional public schools within their territorial boundaries (Arsen & Ni, 2012). Accordingly, charter schools have historically relied on philanthropic support, particularly in the pre-opening period when start-up costs have been incurred but per-pupil revenues have yet to be received (Merrifield, 2006; Wohlstetter et al., 2011). This "heavy dependency" on private sources of funding has left charters susceptible to the demands of foundations, which have increasingly sought to "catalyze systemic reform by bringing charters to scale" and investing "in charter operators who intend[ ] to replicate their educational models" (Farrell et al., 2014, pp. 78, 80; Wohlstetter et al., 2011).

In a number of major American urban centers, well-funded "intermediary" organizations (also known informally as "harbormasters" or "quarterbacks") have worked to attract outside operators into their communities and to provide an emulsifying presence that ensures "cohesion and coordination" among reform constituencies within an educational ecosystem (Hassel et al., 2017). Intermediaries have worked in concert with federal policymakers to advance their preferred flavors of education reform, both by aligning funding priorities and by administering federally funded initiatives in their communities (DeBray et al., 2014; Ferrare & Setari, 2017). These organizations have leveraged philanthropic support from the Arnold, Broad, Dell, Gates, and Walton Foundations as well as from the Hastings Fund to entice operators with established track records elsewhere to commit to interstate expansion efforts (Barnum, 2017b, 2018; Lake, 2007). Lake (2007) bluntly characterized this practice as "import[ing] clones of charter schools founded in other cities" (p. 2). In Louisiana, for example, the funding strategy promoted by intermediary organizations "reflected a consensus ... that the best space to innovate and grow

was not simply in local charter schools, but rather in networks with potential for scale"

notwithstanding concern that this approach would discount "local preferences for independent,

autonomous charter schools" (Scott & Jabbar, 2014, p. 247).

Until 2018, when a $200 million infusion from Arnold and Hastings into a new venture

called the City Fund prompted a restructuring of the national education reform funding

landscape, individual city-based quarterback organizations such as the Boston Schools Fund,

New Schools for Baton Rouge, and the Philadelphia School Partnership were affiliated with a

membership organization known as Education Cities (Barnum, 2017b, 2018). The existence of a

national network supported by common funding sources dramatically increased the likelihood

that scattered municipalities would adopt similar approaches to transforming their public

educational landscapes. As such, this pattern of "convergence" within the philanthropic

community has facilitated the rise of "jurisdictional challengers" to traditional school systems,

teacher training programs, and research institutions that "work on a national scale to develop

their model of school reform" (Reckhow & Snyder, 2014, pp. 187, 190).

If proximity to like-minded individuals and consumption of internally vetted "best

practices" lead naturally to a kind of ideological convergence, the unambiguous expectations of

funders can achieve the same result through a more heavy-handed tack. The example of New

Schools for Baton Rouge (NSBR) is instructive. Founded in 2011 "to attract and foster high-

quality charter school management organizations," NSBR sought to create 12,000 new seats for

low-income students of color by seeking "to identify groups with track records willing to run

schools to supercharge the education of predominantly poor, predominantly black children who

live in north Baton Rouge" (Lussier, 2015). With NSBR's founding executive director a former

colleague of Louisiana's state chief, himself a highly esteemed figure within the education

reform community, funders could be confident that NSBR's approach would "hew closely to" their preferred model (Lussier, 2015). Accordingly, NSBR pledged to "offer limited ongoing support to the home-grown charters" while betting big on national operators they deemed to be "'the IBMs of the charter school space'" (Lussier, 2015).

In Baton Rouge, those wagers on national operators have had mixed results. At one extreme, NSBR has recruited networks whose subsequent immolations have brought disrepute to the charter sector. First, NSBR funded the expansion of Family Urban Schools of Excellence (FUSE) from Connecticut into north Baton Rouge. With NSBR's backing, FUSE received authorization to open a Baton Rouge campus in 2014–2015 (Broussard, 2014). After revelations that FUSE's CEO had falsified his résumé and failed to disclose a prior felony conviction for embezzlement led to the network's unraveling, NSBR pivoted to the other coast and secured a commitment from California-based Celerity to operate the school that had originally been earmarked for FUSE (Lussier, 2015). Celerity soon found itself embroiled in similar turmoil after federal agents raided the network's Los Angeles headquarters as part of an investigation into allegations of financial malfeasance (Phillips et al., 2017). The network's CEO ultimately received a 30-month prison sentence for misappropriation of public funds, and Celerity Louisiana opted to sever its ties with the national organization and rebrand (Lussier, 2019).

Undaunted, NSBR continued to pursue some of the country's most well-known networks to assume operation of local campuses. After luring Democracy Prep from New York in 2015, NSBR celebrated the launch of campuses operated by Arizona-based BASIS and Texas-based IDEA in the 2018–2019 school year (Meyer, 2018). Since 2010, IDEA has received six separate CSP grants totaling nearly $300 million to replicate and expand its model (U.S. Department of Education, 2019). Although IDEA admittedly struggled with its initial attempts to expand within

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Texas, officials expressed confidence that it has done a better job of cultivating local supporters

in both Baton Rouge and Florida, where it agreed to become one of the initial Schools of Hope

operators (Vara-Orta, 2018). The network's approach reflects its belief that strict adherence to a

network's original model increases the likelihood of successful replication. As the network's

proverbial "tip of the spear" with respect to expansion told Chalkbeat, "'I have been hired to

bake an IDEA cake. There are things that always go in the cake, whether I bake it in Baton

Rouge or Fort Worth: the sugar, the eggs, the flour'" (Vara-Orta, 2018). In 2018-2019, IDEA

Innovation received a "C," and IDEA Bridge a "D" on their Louisiana state report cards

(Louisiana Department of Education, 2019). Both schools, however, received an "A" on their

Student Progress measure, indicating that students who may have entered the school behind

grade level were making comparatively rapid strides toward proficiency while enrolled. And in

January 2023, Democracy Prep announced that it would be surrendering its Baton Rouge charter

and initiating closure proceedings after years of declining academic performance (Lussier, 2023).

Challenges Inherent in Growth

Despite these congenial policy frameworks and supplemental funding streams, CMOs

routinely struggle to replicate their initial successes when transplanting their models into new

settings. Wohlstetter et al. (2011) have cautioned that CMOs expanding too quickly are "train

wrecks waiting to happen" (p. 173). New campuses may fail to approximate the quality of their

progenitors; Peltason and Raymond (2013) have found that roughly two-thirds of CMOs "start

new schools that are of the same or slightly better quality as the existing portfolio" (p. 6).

Alternatively, CMOs that attempt to infuse new campuses with the DNA of their existing schools

by seeding expansion sites with experienced staff familiar with their network model may

"struggle to maintain quality in the older schools that lose staff" (Lake et al., 2010, p. 55). And

the CMO central offices responsible for providing the shared instructional and operational services that make replication and its attendant economies of scale attractive in the first place often lack "the capacity necessary to keep pace with their organizational needs" as the network scales up (Farrell et al., 2014, p. 87; Gleason, 2017).

These challenges are felt most acutely by geographically dispersed networks; CMOs that are "successful with one particular population or in one location . . . may become overextended and underprepared for the challenges that arise with new schools in new locations" (Wohlstetter et al., 2015, p. 126). A 2020 study of schools that received pass-through CSP grant funding from the Texas Education Agency to replicate their proven models revealed that networks "encountered challenges when they attempted to open replication campuses whose demographics, grade configurations, geographical settings, and governance constructs differed from those in place when they earned 'high-quality' designations" (Feit et al., 2020, p. 79). One network, which admittedly "underestimated the challenges associated with opening a school in a community with different needs than the ones they were accustomed to addressing at their other campuses," saw its grant-funded campus earn an overall "F" rating during its founding year on the state's academic accountability system while every other preexisting school in the network's portfolio earned an "A" (Feit et al., 2020, p. 17).

This section provides an overview of the issues that CMOs face when attempting to replicate their models and focuses on two discrete challenges: (1) developing and sustaining the internal capacity to support high-quality growth; and (2) striking an appropriate balance between standardization and responsiveness to local policy landscapes, operational conditions, and community expectations. These challenges directly bear on leaders' ability to bring coherence to their organizations.

Internal Capacity

A principal impediment to the effective charter replication is a shortage of the teachers and school leaders needed to execute proven models with high degrees of fidelity. The basic theory underpinning this line of research is that charter school models that "burn through teachers and leaders will struggle over time, within themselves and in expansion efforts" (Wilkens, 2013, p. 235). Research has focused primarily on the difficulty inherent in attracting and retaining sufficient quantities of administrators and teachers who tend to attrit at unsustainably rapid rates on account of the burnout associated with their job demands (Farrell et al., 2014; Torres, 2016c). Wilder and Jacobsen (2010) have dubbed this phenomenon "the short supply of saints." After examining high rates of turnover among teachers at "odds-beating" charter schools whose expectations for adults "[eat] people alive," they concluded that "large-scale replication efforts may not be possible because the teachers who carry out this important work are, for the most part, unable to keep up with the pace of the job" (Wilder & Jacobsen, 2010, pp. 244, 257).

School Leadership

Cohodes et al. (2021) observed that the Boston charter networks that maintained quality while growing had stable leadership throughout their scaling up processes. As Hays (2013) noted, "replicating a laundry list of programmatic characteristics may only lead to limited success without strong underlying values and site-based leadership passionately developing and implementing those characteristics" (p. 76). Ni et al. (2015) stressed that the difficulty of "finding a good 'fit' between the school and the principal" heightens the difficulties associated with leadership turnover in the charter sector (p. 414). Accordingly, charter networks frequently attempt to mitigate the replication challenges attributable to ineffectual leadership by fashioning

internal pipelines that attempt to ensure a steady supply of mission-aligned administrators (Torres et al., 2018).

The manner in which CMOs groom their aspiring leaders reflects the differential responsibilities that administrators of network-affiliated schools have relative both to traditional public school principals and to the leaders of standalone charter schools. Scholars have focused primarily on how charter leadership requires a different set of competencies than does traditional school leadership. Carpenter and Peak (2013) have reported that charter leadership often encompasses not only the full panoply of duties discharged by traditional public school principals but also board management, student recruitment, financial oversight, external affairs, and governmental relations. The authors thus concluded that "charter school success depends significantly on the expertise of its leaders—perhaps more so than does a typical school principal" (p. 151; Ni et al., 2015).

The studies conducted by both Carpenter and Peak (2013) and Ni et al. (2015) took place in jurisdictions in which the preponderance of charter schools were standalones. Accordingly, the resource scarcity, lack of back-office support, and absence of centralized expertise that increase the difficulty level of charter leadership in the ecosystems they analyzed do not necessarily pose the same challenges for the leaders of CMO-affiliated campuses. Because CMOs are designed to provide operational support services that free school leaders to focus on instruction and culture, network-affiliated principals tend to need materially different preparation than do their peers at independent charter schools whose responsibilities are more all-encompassing (Torres et al., 2018). Torres et al. (2018) studied the manner in which charter leaders are trained and supported, paying particularly close attention to the distinct preparation programs deployed by standalone and CMO-affiliated schools. The authors found that leaders at CMO-affiliated schools are

considerably more likely to participate in formally designed pre-service and in-service training programs while leaders in standalone charters are typically responsible for directing their own learning. Critically, the authors noted that CMOs both deprive individual school leaders of some measure of autonomy and provide them with supports and resources that standalone leaders generally lack (Torres et al., 2018).

Torres et al. (2018) concluded that the structured training approaches employed by CMOs (e.g., site-based mentorship, executive coaching, networking and professional development, and observing leaders) provide a more solid foundation on which to build than do the reactive, self-directed approaches on which the emerging leaders of standalone schools are forced to rely. Nevertheless, Higgins and Hess (2009) cautioned that certain "career imprinting" practices associated with effective charter replication—including the provision of "stretch assignments" such as the creation of entirely new school communities—are unlikely to work at scale insofar as they lead to burnout and paradoxically prepare leaders to seek out opportunities to run their own organizations. The upshot is that CMOs must assiduously cultivate leadership pipelines in order to replicate effectively and to sustain their success in new locations but that the tactics they employ toward that end might ultimately lead to the very brain drain they're hoping to avoid.

Teachers

A multitude of researchers have noted that the success of charter school models typically selected for replication is premised on a steady supply of high-capacity, mission-aligned teachers willing to work long hours in demanding environments (Higgins & Hess, 2009; Horsford et al., 2018; Torres, 2016a, 2016b, 2016c; Wilder & Jacobsen, 2010). Torres (2016b) described teacher burnout as a "major obstacle" to the sustainability and functional expansion of CMOs. In order to

grow sustainably, CMOs must either increase the supply of mission-aligned teachers willing to subscribe to their educational visions or increase their average retention rates (Torres, 2016a). Tightly circumscribing the characteristics of a teacher presumed to be a suitable fit only "exacerbates a situation where teacher supply is low and demand is high" (Torres, 2014, p. 16). Even then, the perception remains that the educators willing and able to work with the evangelical zeal and monomaniacal focus that many replicating CMOs demand will inevitably "burn out and move on to more lucrative careers" (Horsford et al., 2018, p. 147).

As is the case with school leadership, teaching in network-affiliated schools poses different challenges for longevity than does teaching in standalone schools. Teachers in standalone schools, much like their leaders, often take on a range of "roles and responsibilities" beyond those expected of classroom educators in traditional public schools (Torres, 2016c). By contrast, teachers in network-affiliated schools may be more likely to lack the autonomy and trust they crave (Torres, 2016b, 2016c). Charters tend to hire high-performing teachers who expect professional autonomy, and limits on such autonomy "that result from highly prescriptive educational models is a factor contributing to high turnover in CMOs" (Torres, 2014, p. 3). Torres (2016b) studied the impact that being required to execute a school-wide behavioral management system had on teacher retention in CMO-affiliated schools and concluded that perceptions of CMO disciplinary systems were associated with turnover even after controlling for teacher characteristics and workload. Specifically, Torres found that enforcing the common behavioral expectations that theoretically facilitate model replication results in a "general climate of unhappiness and negativity" and leads to "exhaustion, cynicism, and inefficacy" (p. 191). While teachers generally believe in the importance of clear and consistent systems, the need to be constantly correcting minor misbehaviors "can influence CMO teachers' decisions to leave

when expectations are perceived as detrimental to students, and when teachers are not given the professional autonomy or input into deciding what works best for socializing students" (Torres, 2016b, p. 177).

Relatedly, teachers at CMO-affiliated schools—particularly those whose network model features high expectations for teachers and students—may lack trust in their campus leaders (Torres, 2016c). Torres (2016c) posited that "relational trust" is developed when individuals extend themselves beyond what their role might formally require and that, consequently, such trust is difficult to develop in situations where "extraordinary efforts constitute the minimum expectation" (p. 70). Torres (2016c) described a situation in which an individual who assumed an intermediate leadership role at a CMO-affiliated campus elected to leave in the middle of the school year after determining that she could no longer trust her principal to make changes to the network model that she felt would serve the interests of teachers and students. This finding echoes those put forward by Lawson et al. (2017), who have concluded that trust suffers when teachers are treated "like implementation puppets" as central office and campus leaders dictate the manner in which initiatives are executed (p. 54).

While autonomy encroachments and trust vacuums may be the proximate causes of significant teacher turnover in CMO-affiliated schools, their effects on the teachers who do remain are equally important in considering the networks' ability to scale with quality. High-capacity educators in network-affiliated replication campuses who find their autonomy subordinated to top-down mandates may become disillusioned if they view their school leaders as impotent pawns of a distant establishment unwilling to modulate its approach to suit local norms (Torres, 2014). Network-affiliated teachers understand that uniform policies are not always executed with the same degree of skill on all campuses. In particular, school-wide

behavior management policies that can lead to the creation of positive learning environments on some campuses may, in the hands of less-skilled leaders, lend to draconian implementation that contributes to teachers' feelings of frustration (Torres, 2016b).

Balancing Standardization and Customization

Another persistent barrier to effective charter replication is the tension inherent in CMO efforts to strike an appropriate balance between network-level standardization and school-level customization. On the one hand, Lake (2007) faulted growing CMOs for failing "to insist on faithful replication" and attributed the "uneven quality" of network-affiliated campuses to uncertainty around "how much to allow sites to adapt the model to fit local desires" (p. 2). On the other hand, over-commitment to model fidelity can lead to "resistance" and "blind compliance" if those on the ground are "locked in a pattern of rote, mechanistic implementation" rather than actively engaged in the process of shaping a model to reflect local circumstances (Peurach & Glazer, 2012, p. 176). Insistence on faithful adaptation "presumes that organizations can and should keep doing what they have done before and that clones will prove similarly effective in new locales" (Higgins & Hess, 2009, p. 10). By contrast, Weick (1976) has argued that the durability of "loosely coupled" educational organizations (i.e., systems in which key variables are "somehow attached" but where each element preserves its own "identity, uniqueness, and separateness") is enhanced by the ability of one appendage to "adjust to and modify a local unique contingency without affecting the whole system" (pp. 3, 7).

Reconciling the need for common systems, terminology, and philosophy with the discrete political environments, operational requirements, and stakeholder needs in the communities in which a network operates poses significant challenges. As explored above, within the CMO construct, autonomy frequently rests with the central office rather than with the individual

campus (Torres et al., 2018). Thus, researchers who emphasize the importance of charter autonomy while simultaneously arguing that "the more responsive an environment can be, the more likely needs are to be met" (Hughes & Silva, 2013, p. 177) elide a central tension within the CMO paradigm. That is, vesting autonomy with a network office as opposed to a replication "hub" may lead to deprivations of the very local control and situation-specific model adaptation that would allow for core routines to be adapted to "address local exigencies and environments" (Peurach & Glazer, 2012, p. 167).

Inattentiveness to local considerations can hamstring a CMO's efforts to transplant its model into a new community with the consequences redounding to the detriment of students and families. Wilson (2016) explored the experiences of parents at a Minnesota charter school organized around the experiences of the Somali immigrant community and explicitly designed to create a safe and empowering space for a traditionally marginalized population. The author assessed the extent to which a school with a narrow and exclusive appeal comports with traditional conceptions of "public" institutions and grappled with the idea that this particular school provides a culturally affirming setting for parents who failed to find similarly welcoming environments in the traditional public school system. Wilson expressed concern that the growth of CMOs—which often feature white governance and leadership teams, and which receive the backing of white foundation executives—has crowded out community-based charter schools led by individuals and organizations hyper-attuned to the needs of a specific locality.

Notably, Wilson (2016) questioned whether network-affiliated schools expanding into new neighborhoods will exhibit the authentic commitment to parent engagement and shared decision-making that she considers key evidence that democratic practices continue to exist within potentially "counterpublic" institutions. Research appears to lend credence to these

concerns. In a longitudinal study on the growth of KIPP, America's largest CMO, researchers at Mathematica surveyed regional executives about the characteristics correlated with successful leadership of KIPP schools (Knechtel et al., 2015). The KIPP model is somewhat inapposite in that the network does not directly operate schools from a national nerve center; research suggests that KIPP's franchise format creates a dynamic akin to that in place at standalone schools where entrepreneurial principals and teams of campus-based educators are afforded greater autonomy (Roch & Sai, 2017). Nevertheless, it is telling that less than five percent of regional executive directors ranked "experience with the school/community/region" among the three most important characteristics that a founding network principal should possess, and precisely zero percent ranked such experience as among the three most important characteristics possessed by successor principals (Knechtel et al., 2015). A 2010 report found that surveyed CMO leaders "consistently rank parent/community involvement lower than almost every other barrier to growth or success factor" (Lake et al., 2010, p. 42). Moreover, Carpenter and Peak (2013) surveyed 78 Colorado charter leaders to assess how they define their roles, how much influence they are able to exert in critical operational and instructional areas, and how confident they feel when discharging their duties. The authors found that leaders viewed creating internal cohesion, managing staff, and ensuring school safety as their primary responsibilities. By contrast, they assigned less importance to cultivating support with external stakeholders including parents and oversight agencies.

This seeming indifference to community norms may engender forceful pushback from the beneficiaries of a charter organization's services. Farrell et al. (2012) have noted that antagonistic relationships with local stakeholders may serve as an impediment to CMO growth. A high-profile recent example of this incompatibility between national operators and local

stakeholders came in Tennessee. Glazer et al. (2019) analyzed the challenges confronted by CMOs undertaking school turnaround projects within Tennessee's Achievement School District (ASD), a state-run district empowered to intervene in Tennessee's lowest-performing schools, remove them from the jurisdiction of their local school boards, and match them with high-performing charter operators. Glazer et al. noted that operators within the ASD struggled to reconcile market imperatives, public accountability requirements, and community priorities when structuring their turnaround efforts. The authors explained that "the fact that the leaders of most operator organizations were white and from out of state further contributed to the perception of the ASD as a hostile state takeover siphoning off students and dollars from an underresourced and neglected African American-led district" (p. 18). The Tennessee example dramatizes the competing pressures facing charter leaders who are simultaneously responsible for tailoring a network's model to comport with shifting operational requirements and community expectations and for thriving under rigorous oversight regimes.

Conceptual Framework: Creating Coherence

Effective educational organizations are characterized by institutional coherence. Whereas incoherent organizations are rife with widespread confusion, initiative fatigue, and the prioritization of seemingly arbitrary and *ad hoc* projects, coherent organizations are defined by clarity, consistency, collaboration, and collective efficacy (DuFour & Fullan, 2012; Fullan & Quinn, 2016). Educational leaders play a central role in creating coherence by fostering a spirit of "connectedness" or "systemness" (Buchmann & Floden, 1992; DuFour & Fullan, 2012). Buchmann and Floden (1992) have contrasted "coherence" with "consistency" and contended that the latter implies "logical relations and the absence of contradictions" while the former permits a richer form of affiliation that also incorporates "associations of ideas and feelings" (p.

4). For their part, DuFour and Fullan (2012) contrasted "coherence" with "alignment," with the latter concept being predicated on organizational structure and the former being grounded in shared mindsets. Campbell and Fullan (2019) stressed that coherence is essentially a subjective phenomenon, arguing that a "shared depth of understanding" and a "moral imperative" held in common by campus-based personnel, central office administrators, and board members are its defining features (pp. 9, 91). Alignment, therefore, is better viewed as an enabling condition that permits coherence to take root rather than as a synonymous phenomenon.

For the purposes of this study, coherence refers to the extent to which a system is characterized by organizational alignment, shared mindsets, and commonality of purpose. The principal theoretical lens through which data collected for this study were analyzed is the Coherence Framework propounded by Fullan and Quinn (2016). Fullan and Quinn (2016) have argued that educational leaders bring coherence to their organizations by seizing on four "drivers" of sustained systemic improvement: (1) focusing direction; (2) cultivating collaborative cultures; (3) securing accountability; and (4) deepening learning. Fullan and Quinn have recommended that leaders address the four components of the Coherence Framework presented in Figure 1 "simultaneously and continuously" (p. 11).

Figure 1. *Fullan and Quinn's Coherence Framework*

Source: Fullan & Quinn (2016), p. 129.

This study focuses primarily on the first two drivers instantiated in Fullan and Quinn's (2016) Coherence Framework (i.e., focusing direction and cultivating collaborative cultures) as the literature suggests that those features of coherent educational organizations are particularly challenging to achieve in the multistate context. As Fullan and Quinn's (2016) Coherence Framework offers a lens through which to observe the actions of educational leaders who guide their organizations through successful change efforts, it has particular salience within the context of multistate CMOs that have frequently struggled to maintain quality while replicating.

Focusing Direction

Focusing direction represents one way that leaders attempt to bring coherence to their organizations. Fullan and Quinn (2016) have explained that focusing direction is "not just a matter of having uplifting goals" but instead "a process involving initial and continuous engagement" (p. 46). Being purpose-driven, articulating impactful goals, adopting a clear strategy, and engaging in change leadership are the essential steps a leader can take to focus direction within their organization (Fullan & Quinn, 2016). To avoid fragmentation and the

specter of "initiativitis" that often foments resistance to change efforts, leaders should set a small number of ambitious goals and create a clear strategy for pursuing them (Fullan & Quinn, 2016).

Classically, central offices have attempted to create coherence by engaging in "brokering" efforts that consist of "bridging" siloed individuals to other individuals and resources that can make their work more purposeful and "buffering" campus-based personnel from "potentially unproductive external influences" (Honig et al., 2010, p. 42). Coherent organizations instantiate practices that advance institutional objectives, design structures that promote key policies, and ensure that actions undertaken within one department or at one site are not inconsistent with those being undertaken elsewhere (DuFour & Fullan, 2012; Grossman et al., 2008; Johnson et al., 2014).

System leaders play an essential role in creating coherence by helping campus-based personnel "negotiate external messages as they work to craft coherence" (Rigby et al., 2018, p. 35) and by "working with schools to collect information about schools' goals and strategies and using that information to guide their provision of supports" (Honig & Hatch, 2004, p. 27). Effective central office leaders undertake collaborative goal-setting processes and ensure that campus administrators are intimately involved in the establishment of system-wide objectives (Marzano & Waters, 2008). District leaders create organizational coherence by converting external policy demands into system-specific initiatives that "represent an amalgam of external policy and internal goals and strategies" (Rorrer et al., 2008, p. 323). Intermediaries who provide connective tissue between central offices and campuses can serve as "agents of coherence" by reframing system-wide expectations in language likely to resonate with school personnel and by delivering bottom-up feedback from schools to the central office (Johnson et al., 2014, p. 67). Indeed, this two-way feedback loop in which the central office monitors school-level efforts to

achieve system-wide goals, identifies effective adaptations, and then feeds those learnings back out to other schools is a hallmark of organizations that replicate successfully (Peurach & Glazer, 2012). Leaders of coherent organizations do not regard the process of focusing direction as a series of "sequential, discrete stages" that can be navigated in a linear fashion (Fullan & Quinn, 2016). Rather, they understand that coherence is the residue of a clear vision and a commitment to continuous learning and improvement (Fullan & Quinn, 2016).

These measures generally fit within the "structural" frame of the quadripartite framework propounded by Bolman and Deal (2017), which consists of two key elements: the allocation of responsibilities and the coordination of efforts. Underperforming entities often attempt to remedy their internal issues through structural fixes such as revisions to the organizational chart and clarification of roles and duties. Slotting people into the correct roles ensures that they are maximizing their contributions while aligning their individual efforts to accomplish collective goals allows organizations to generate efficiencies and to avoid inequity, confusion, and frustration (Bolman & Deal, 2017). Echoing Fullan and Quinn (2016), Bolman and Deal (2017) have contended that leaders must chart an "intentional course of action" to ensure structure is in the service of these objectives (p. 50). Accordingly, operation through the structural frame allows organizations and their leaders to streamline workflow and to enhance communication.

Bolman and Deal's (2017) political frame is also apropos. The political frame presupposes an environment of scarcity within which individuals and coalitions jockey for influence and attempt to wield power either through formal hierarchical structures or through situational mobilization of manpower, money, and might (Bolman & Deal, 2017). Before embarking on a new initiative, particularly one likely to spark impassioned pushback, leaders must survey the political map to determine where such opposition might arise, how such

resistance might manifest, and what anticipatory countermeasures can be undertaken to neutralize such threats (Bolman & Deal, 2017). Thus, leaders must be clear-eyed and unsentimental when attempting to focus direction. Because organizational coherence requires leaders to select a limited number of goals, they inevitably will end up disappointing key stakeholders whose priorities were not adopted. Understanding how to negotiate potentially treacherous waters in order to prevent a clear organizational direction from becoming muddied requires political savvy.

Cultivating Collaborative Cultures

Leaders develop the shared mindsets that lie at the heart of coherence through their efforts to cultivate collaborative cultures. In order to bring coherence to their organizations, leaders must generate internal alignment and foster a sense of shared purpose. Fullan and Quinn (2016) have contended that coherence lives "in the minds and actions of people individually and ... collectively" (p. 2), while Campbell and Fullan (2019) have elaborated that organizational coherence exists in "hearts and minds" and requires "*shared* understanding among large numbers of people" (p. 94). Leaders must shape their organizational cultures in a way that fosters trust through deep relationships, authentic engagement, shared leadership, and a commitment to collaborative inquiry (Fullan & Quinn, 2016).

It is widely accepted that building and sustaining trust between stakeholders at all levels of an organization is key to creating coherence (Canrinus et al., 2019; Johnson et al., 2014). This trust is painstakingly earned and easily squandered (Johnson et al., 2014). Structural alignment absent buy-in from the campus-based stakeholders whose willingness to implement central office priorities determines the success of a systemic initiative results in a "contrived coherence" that seldom leads to meaningfully improved outcomes for students, educators, or families (DuFour &

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Fullan, 2012, p. 31). DuFour and Fullan have explained that the "building blocks of coherence across the system involve leaders interacting widely in purposeful ways so that greater mutual allegiance and collective capacity are continuously fostered" and that these connections are formed daily in "highly interactive systems" (p. 24). Fullan and Quinn (2016) described the "consistent, collective shaping and reshaping of ideas and solutions" as the bedrock of "deep coherence" (p. 47).

Critically, the bridging and buffering efforts described above not only generate alignment in practice but build ineffable trust by demonstrating to campus-based actors that central office actors are committed to making their day-to-day lives less complicated (Durand et al., 2016). These actions roughly align with the "human resources" and "symbolic" frames enshrined in Bolman and Deal's (2017) framework. The former encourages leaders to craft a system that benefits the needs of both the organization and the individuals who compose it while the latter underscores the ineffable value of an organizational culture whose stories, rituals, and traditions "create meaning and generate emotional attachment" (Bolman & Deal, 2017, p. 378).

Coherence in the Multistate Context

I elected to focus on the first two drivers embedded in Fullan and Quinn's (2016) Coherence Framework on account of the challenges they pose within the context of multistate charter leadership. Focusing direction requires adoption of a select number of specific, mission-critical goals supported by a clear strategy for achieving them. Within the multistate context, however, leaders often face divergent regulatory and political realities that transform a goal that appears reasonable in one setting into one that appears unattainable in another. Take, for example, a leader who has determined that their organization should shift beyond a "college for all" focus and must consider creating pathways for students who signal a preference for a career

and technical track. This objective may be readily attainable in one state where the legislative and executive branches have decided to afford schools flexibility in how they structure their high school programs but incompatible with another state's model that requires high schoolers to earn a set number of credits within predetermined distributional requirements in order to graduate. Focusing direction on a specific goal, in this instance, would presumably require a leader to waver from the clarity and specificity that Fullan and Quinn (2016) recommend.

The use of intermediaries who engage in essential "brokering" efforts is also complicated in the multistate context. An individual sent as an emissary from the central office must take pains not to betray a lack of understanding of the unique linguistic conventions, reporting systems, accountability measures, and cultural considerations that characterize the community into which they are venturing. An ostensibly benign slip of the tongue can be misconstrued as a wholesale ignorance of the conditions on the ground. Should campus-based stakeholders view these intermediaries as patently unhelpful, they may be less inclined to engage with the central office in a way that permits a network leader to maintain a directional focus. Marzano and Waters (2008) have stressed the importance of campus-based leaders refraining from subverting district objectives by "subtly communicating" to staff that they are inappropriate or unattainable (p. 7). The proverbial school that "goes rogue" and decides that it knows what is best for its own students is far more difficult to rein in when (a) it in fact has deeper and more authentic connections with local stakeholders than does a remote central office, and (b) the early warning signs of potential deviation from the organization's purportedly shared direction are missed on account of the infrequent touchpoints between hub and outlet.

Similar challenges exist for leaders of multistate networks attempting to create collaborative cultures. For multistate CMOs, generating the "mutual allegiance" and "social

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glue" that underpin this sense of "systemness" (DuFour & Fullan, 2012, p. 31) is particularly challenging. Traditional public school systems are circumscribed by clearly defined (and jealously guarded) geographic boundaries. As such, Fullan and Quinn's (2016) Coherence Framework and the related literature concerning central office leadership efforts to bring coherence to their organizations presuppose geographical contiguity. The sheer physical distance between a CMO headquarters in one state and an affiliated campus in another, however, complicates efforts to engage in these coherence-building exercises.

Johnson et al. (2014) examined how five districts managed the relationship between their central office and their schools and observed that districts frequently err toward either "rigorous centralization" or "radical decentralization" (p. 39). The authors concluded that while rigorously centralized approaches risk downplaying the "expertise and ingenuity of principals and teachers" and radically decentralized approaches court inefficiency and inequity, either approach can theoretically lead to the creation of system-wide coherence provided that the selected theory of change is developed and implemented effectively (p. 157). The authors explained that "establishing mutually supportive relationships and trust" between central office and schools is key to the coherence-building process and contend that district leaders must cultivate trust assiduously "over a long period of time" (p. 21). With physical distance preventing central office leaders from routinely interacting with campus-based stakeholders in a manner that slowly and imperceptibly results in the steady accumulation of trust and thus inhibiting the creation of a sense of "systemness," CMOs may struggle to develop the shared mindsets necessary to effect sustained change.

Ramifications of Multistate Charter Networks Struggling to Create Coherence

Largely missing from the literature on charter replication is an exploration of how multistate networks attempt to bring coherence to their organizations. Given the constellation of factors described in this chapter that have contributed to the explosive growth of CMOs, this topic warrants further study. State actors and private funders have made significant bets on "proven" charter operators replicating their models in some of America's most historically underserved and disenfranchised communities. Students and families are relying on these schools to furnish high-quality, responsive educational opportunities. Educators are counting on these networks to make their individual efforts more purposeful. Accordingly, the ramifications of these networks struggling to create coherence in their operations are particularly troubling.

For a program to replicate effectively, it must be "robust under many circumstances" and "must demonstrate its effectiveness in new sites that are not under the day-to-day control of the program developers" (Slavin et al., 1994, p. 639). Oftentimes, networks crossing state lines prove to be "over-extended and under-prepared" for the challenges inherent in transplanting a model from one state to another (Farrell et al., 2014, p. 81). As a result, multistate CMOs produce weaker student growth than do CMOs with more geographically concentrated networks (Woodworth & Raymond, 2013). Perhaps contributing to these middling academic results is the educator turnover in network-affiliated schools occasioned by overly centralized systems. While Torres (2014) recognized that "strong instructional and disciplinary support systems to promote consistency and help struggling teachers develop are a key feature of academically successful CMOs," he cautioned that networks run the risk of losing educators who expect professional autonomy when those systems are insufficiently flexible and responsive to campus-specific needs (pp. 16–17). This finding echoes Johnson et al.'s (2014) "paradoxical" observation that "a

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high degree of alignment and coherence in the strategic priorities that make up [a school system's] strategy ... may constrain professional judgment" (p. 78). When the high-capacity educators on whom a multistate network relies to scale its proven model exit prematurely on account of the perceived lack of trust they sense from central office administrators, the already-short supply of saints dwindles even further.

With charter caps, limited pipelines of educators and students, and finite facilities options serving as environmental constraints, schools operated by multistate CMOs necessarily crowd out those that might be opened by other operators. As CMOs have increased in prominence and eroded the market share of standalone charter operators, the potential for charters "to create spaces for differentiation" has faded as their models have become progressively "more uniform" (Wilson, 2016, p. 926). Consequently, pluralism has yielded to isomorphism, and homogeneity has come to characterize a sector whose promise as an engine of experimentation was once viewed as a necessary corrective to ossified district bureaucracies (Carpenter, 2008; Kingsbury et al., 2020; Lefebvre & Thomas, 2017).

Horsford et al. (2018) have contended that the "need to keep models distinct and intact can preclude local preferences for addressing the particular educational needs of students and communities" (p. 128). These "more corporate CMOs may crowd out the market for community-based schools, limit the ability of school leaders to develop new school models, or contribute to a growing privatization of education" (Wohlstetter et al., 2015, p. 126). Indeed, upon codification of these "proven provider" clauses, scholars who had once heralded Massachusetts's charter law as striking an appropriate balance between autonomy and accountability began to lament the fact that such restrictions, though designed to ensure that "new schools are likely to be effective," would simultaneously "[cap] opportunities for further innovation" (Candal, 2010).

The ASD example in Tennessee offers an object lesson in damned-if-you-do-damned-if-you-don't. When self-aware multistate operators attempt to expand their missions in order to achieve greater congruence with community norms, their efforts to provide wraparound social services and to layer comprehensive neighborhood support on top of their standard educational offerings can easily strain their capabilities and stretch their already scarce resources "across a wider, more diffuse array of purposes" (Glazer et al., 2019, p. 25). To avoid this mission creep, a coherent organization must determine how to adapt its existing programming to suit local needs rather than commit to scattershot projects in each successive community.

Peurach and Glazer (2012), however, have argued that the value in replication is not in the certainty that it purportedly portends but in the possibility that local stakeholders and central office personnel will engage in an ongoing dialogue that builds their "collective dynamic capabilities" (p. 181). In this respect, multistate networks are uniquely well-positioned to serve as "learning organizations," i.e., places "where people are continually discovering how they create their reality" and are "continually expanding [their] capacity to create [their] future" (Senge, 2013, pp. 12–13). Indeed, Weick (1976) has argued that "loosely coupled" organizations—which are often characterized by decentralization, delegation of authority, and limited observational capabilities—permit "mutations and novel solutions" that would be suppressed within more conventionally structured systems (p. 7). Because these leaders are compelled to adapt certain elements of their programs to suit the jurisdictional realities of different operating environments, they are routinely and systematically being put in a position to assess the relative efficacy of varying approaches. To the extent that these leaders are adept at identifying what is working well in one location and spreading that practice to other settings, the multistate construct can serve as an accelerant for internal continuous improvement efforts.

Conclusion

This study addresses a gap in the current body of research by contributing to our understanding of how educational leaders confronted with the daunting challenge of running multistate school systems attempt to create coherence within their organizations, a precondition to maintaining quality at existing sites while launching new ones that approximate the caliber of those more mature campuses. These learnings should have broader ramifications within the field of educational leadership, as administrators within traditionally structured systems stand to benefit from examining how their peers in more atypical environments locate potential within their myriad constraints.

Chapter 3: Research Design and Methodology

This study is designed to investigate and to critically analyze the experiences of multistate charter network leaders as they attempt to focus direction and cultivate collaborative cultures. Accordingly, it is important to capture the perspectives of participants as they explain the singular challenges inherent in leading geographically non-contiguous school systems and describe some of the steps they have taken to bring coherence to their organizations notwithstanding the material legal, operational, and cultural differences that define the communities in which their schools are located.

To guide my research, I developed the following research questions:

(1) How do the leaders of multistate charter networks navigate the disparate policy landscapes, operational conditions, and stakeholder expectations that characterize the communities in which their schools are located?

(2) How do the leaders of multistate charter networks attempt to create coherence within their organizations?

This chapter is structured so as to track the criteria for Chapter 3 set forth in Roberts and Hyatt (2018) and proceeds as follows. First, I explain why conducting a qualitative case study is a suitable methodological approach to address this study's research questions. Second, I explain how the study's participants were identified. Third, I explain the types of data that were collected for this study and how I collected them. Fourth, I describe the methods I used to analyze the data and to heighten the validity of my findings. Fifth, I explore the role of the researcher in conducting this study. And finally, I consider the limitations of this study.

Research Design: A Qualitative Case Study

According to Schreiber and Asner-Self (2011), qualitative methodologies are designed to illuminate "the whys and hows of human behavior" (p. 194). Situated within the qualitative research tradition, case studies are in-depth explorations of organizations or individuals (Schreiber & Asner-Self, 2011). Yin (1993) has opined that case studies have historically been an "underappreciated and underutilized research tool" among educators and explains that one major rationale for employing a case study method is when a study must explore "both a particular phenomenon and the context within which the phenomenon is occurring" (pp. 31, 40). Effective case studies are circumscribed by time and place and occur within a discrete level of analysis that fixes the study's parameters (Creswell, 2007; Schreiber & Asner-Self, 2011; Yin, 1993).

Exploratory case studies help "develop or further refine research questions and hypotheses" and enable a reader to develop a "holistic picture" of the context being studied in order to facilitate deeper understanding (Schreiber & Asner-Self, 2011, p. 205). Collective case studies, which consist of several cases, are ideal for examining the contours of a phenomenon in detail as they permit the researcher to analyze that phenomenon both within and across a range of distinct settings (Baxter & Jack, 2008; Scheib, 2003). Collective case studies allow individual cases to be compared and contrasted, providing multiple perspectives and engendering a more robust understanding of the phenomenon under exploration (Arghode & Wang, 2015; Au & Blake, 2003; Yin, 2009).

The level of analysis for this case study was the multistate charter network. Given both the unique challenges that the leaders of multistate charter networks face and the likelihood that powerful financial and regulatory currents will drag a progressively larger number of leaders into

these precarious positions over the coming years, it is vitally important for practitioners, policymakers, and funders to understand how these leaders attempt to bring coherence to their organizations. A collective case study methodology centers the perspectives of the stakeholders charged with navigating the assorted challenges that can impair an organization's efforts to operate effectively in more than one state. Soliciting the perspective of multiple multistate charter network leaders enriched the study by illuminating the similarities and dissimilarities of both the challenges they have faced when attempting to bring coherence to their organizations and the approaches they have taken to focus direction and create collaborative cultures.

Participant Selection

This section describes how study participants were identified. Vaughn (2014) has outlined a four-step process for fashioning a qualitative research sample. As a threshold matter, prior to embarking on a qualitative study, a researcher must define the sample universe by establishing inclusion and exclusion criteria that determine participant eligibility (Vaughn, 2014). Subsequently, the researcher must identify an appropriate sample size, devise a sample strategy, and recruit participants from the target population (Vaughn, 2014). Purposive sampling entails the identification of individuals who are "especially knowledgeable about or experienced with a phenomenon of interest" (Palinkas et al., 2015). The "essence" of purposive sampling is the selection of "information-rich cases for the most effective use of limited resources" (Duan et al., 2015, p. 525). Heterogeneous purposive sampling is a technique that allows for a researcher to recruit study participants who meet the defined eligibility criteria while simultaneously representing a range of characteristics within the target population (Lupinacci, 2021; Stuart et al., 2015). Heterogeneous sampling bolsters the validity of a study's findings by highlighting

commonalities that appear generally applicable across a range of settings and contexts as opposed to being confined to a specific population (Robinson, 2014; Vaughn, 2014).

The sample universe for this study was the chief executives of multistate charter networks (i.e., networks that directly operate schools in more than one state). I identified those eligible to participate in the study by generating an initial list of potential targets based on my personal familiarity with the national CMO landscape and by cross-referencing that list with the dataset included in the National Alliance for Public Charter School's "National Charter School Management Overview" (David, 2019). Non-random selection of five study participants, who were recruited via direct outreach and who represented a range of characteristics (e.g., geography, network age and size, tenure as CEO) within the target population, ensured inclusion of a range of perspectives and permitted comparison of findings across settings and contexts.

The study sample included five chief executives of multistate charter networks. Given the relative paucity of CMOs that directly operate campuses in multiple states, this sample represents roughly 15–20% of the total universe of educational leaders employed in this capacity (David, 2019). A visual review of information provided on CMO websites and accessible through other publicly available data sources revealed that approximately 65% of the individuals serving as the chief executives of multistate networks at the start of the 2022-23 instructional year were white, while roughly 75% were male. Relative to the target population, the study sample consists of slightly higher percentages of white leaders and males. The comparative scarcity of networks operating in this fashion necessitated taking precautions in order to encourage participants to speak candidly about their experiences. Accordingly, in an effort to preserve confidentiality, I am using pseudonyms and they/them singular pronouns, and I am obscuring the identities of the

organizations with which these leaders are affiliated by referring in general terms to "flagship" and "satellite" regions rather than to the specific states in which these networks operate.

Gilbert

> *I think of myself as a charter true believer. I've been drinking the Kool-Aid for 25 years.*

Gilbert is the founder and chief executive of Playstead Prep. Gilbert's initial foray into charter school operation was as a board member. With a background in public policy and a full-time role in state government, Gilbert leveraged their experience working with budgeting, public accountability, and intricate regulatory schema to be a high-value partner for the school's leader. Gilbert's affinity for the work was such that they transitioned into education full-time, taking jobs as a charter leader and charter authorizer before launching Playstead Prep.

Holt

> *That experience in a district school led me on a path to where I am today. I couldn't do any of this without having been a classroom teacher.*

Holt is the chief executive of Reservoir Academy. Holt started as a high school teacher in a traditional public school before completing a master's program that was "hugely helpful" to the extent that it provided "a sense for what's been tried, what works, what doesn't work, why something was tried, and why it didn't work." Holt then founded a charter school, an experience that allowed them to learn how to hire and develop teachers, work with boards, and secure facilities. When that school became affiliated with a network of schools, Holt moved into a central office leadership capacity before ultimately acceding to the role of CMO chief executive.

Winslow

> *The new superintendent drew a rectangle. He said, 'I hear you're a maverick. That's a corral, and you're gonna get in it.'*

Winslow is the founder and chief executive of Perennial Public Schools ("Perennial"). After completing a two-year stint as a Teach for America corps member, Winslow quickly became "disenchanted with the district." Winslow founded a small autonomous school, but a change in district leadership shortly after the school's launch resulted in the school being rebranded as a "small school" (implicitly curtailing the school's autonomy) and forced Winslow to play "hide-and-seek" to avoid unwanted scrutiny. Seeing the writing on the wall within the district but wanting to remain in education, Winslow got to work on launching Perennial.

Channing

Lived experience is certainly tantamount to formal training.

Channing is the chief executive of Cadence Collegiate. A lawyer by training, Channing worked in a governmental capacity, as an in-house attorney for an educational organization, and as the leader of a career- and college-readiness program before ultimately joining Cadence Collegiate as its chief executive. Channing has also served on the board of several educational organizations (including a charter network) and had a "brief stint" as a charter leader prior to joining Cadence Collegiate, experiences that Channing believes prepared them to succeed in their current capacity despite having never participated in a formal management training or executive leadership program.

Lovell

> *I thought TFA was cultural tourism. I didn't agree with the premise that it was the Peace Corps of domestic education. No, you're not going to come in and be our saviors. My mom was a public school teacher for 30 years. It's not a noble pursuit like, "Look how nice I am, I went to Yale and now I'm going to deign to spend two years in an inner-city school." Like, fuck you, you're either in it or you're not. As a 22-year-old, I was so offended by the concept. I'd like to think I have a more nuanced view now.*

Lovell is the chief executive of Eclipse Charter Schools ("Eclipse"). Having earned undergraduate and master's degrees in education, Lovell began their career in public education

as a reform skeptic. After expressing "anti-charter" sentiments to a peer while acknowledging they had never actually been to a charter school, Lovell accepted an invitation to spend a week visiting a charter school and soon began teaching there. Before becoming the chief executive of Eclipse, Lovell worked for a district, a CMO, and an educational funder. In each role, Lovell saw "smart people trying to reform the systems that already exist," and they felt an obligation to take what they had seen at a systems level and apply it in an operational capacity.

Select demographic information about the study participants is provided in Table 1.

Table 1. *Demographic Profile of Study Participants*

Name	Network	Founder / Successor	Internal Promotion / External Hire	Started Career as Teacher?
Gilbert	Playstead Prep	Founder	N/A [Founder]	N
Channing	Cadence Collegiate	Successor	External Hire	N
Lovell	Eclipse	Successor	External Hire	Y
Winslow	Perennial	Founder	N/A [Founder]	Y
Holt	Reservoir Academy	Successor	Internal Promotion	Y

Data Collection

Data for this study were collected through interviews, nonparticipant observations, and document analysis.

Interviews

Qualitative researchers conduct interviews to ascertain what is on a subject's mind, i.e., "what they think or how they feel about something" (Fraenkel & Wallen, 2006, p. 455). In contradistinction with quantitative interviews that are "based on highly structured questionnaires," effective qualitative interviewers attempt to be flexible and interactive in order to meet the interview subject where they are, to probe beneath the surface, and to "uncover new

areas or ideas that were not anticipated at the outset of the research" (Britten, 1995, p. 252).

Semi-structured interviews facilitate comparability among respondents while informal interviews

permit the researcher to explore areas of inquiry illuminated during observation sessions

(Fraenkel & Wallen, 2006). According to Aberbach and Rockman (2002), the benefits of

conversational flow and depth of response yielded by the semi-structured format can outweigh

the methodological issues raised by deviation from a scripted battery of questions.

      The semi-structured interview format is particularly well-suited to qualitative studies in

which the participants are at the pinnacle of their respective professions (Aberbach & Rockman,

2002). The validity of these "elite interviews," a term that implicates potential power

asymmetries and privilege disparities between the interviewer and subject, can be strengthened

by allowing respondents to articulate their responses in full and to furnish answers within their

own frameworks and schema rather than being shoehorned into narrow analytical boxes

(Aberbach & Rockman, 2002; Empson, 2017). Challenges attendant to conducting elite

interviews can include those related to gaining access to participants, establishing authority, and

building rapport (Empson, 2017). Milkecz (2012) and Empson (2017) suggest that interviewers

can mitigate these challenges by demonstrating knowledge of the interviewees' backgrounds;

exhibiting familiarity with their culture, language, and norms; and anticipating their potential

motivations for agreeing to participate.

      The validity of interview data collected by skilled researchers transcribing notes in real-

time may, somewhat counterintuitively, be enhanced by the absence of an audio recorder.

Rutakumwa et al. (2020) have found that interview scripts produced from notes taken during a

conversation are comparable in the degree of detail captured to audio-recorded transcripts.

Moreover, these unrecorded interviews may produce more accurate representations of the

subjects' true sentiments given that "the effect of the presence of the audio recorder, whether turned on or off, is such that the participant's circumspection means that something might not get said at all" (Rutakumwa et al., 2020, p. 578).

Interviews were conducted between March and June of 2022. When conducting each interview, I used a semi-structured guide outlining the topics I intended to cover and including a set of sample questions to be used or adapted in the service of exploring those topics. These guides were tailored to the role of the interview subject (i.e., different guides were used for network leaders and regional administrators). While interviews with each set of stakeholders covered the same range of topics, the precise phrasing and sequence of the questions varied in order to preserve flexibility and to allow for subjects to explain, elaborate, and digress as they articulated their thoughts.

A total of 11 interviews were conducted during the study period. For each of the five multistate networks included in the study sample, I conducted an interview with the central office's chief executive. These interviews ranged in length from 60 to 90 minutes. The principal purposes of these interviews were to elicit information about the leaders' backgrounds, their experiences operating schools in multiple states, and their efforts to bring coherence to their respective organizations.

Interviews with Gilbert, Winslow, and Lovell were conducted in person while those network leaders were visiting campuses in satellite regions. As Cadence Collegiate's Covid protocols did not permit in-person data collection, I interviewed Channing over the phone. Similarly, while I had an opportunity to conduct a co-observation of a Reservoir Academy school in a satellite region with Holt, we did not have enough time for a formal interview during their visit. Accordingly, that interview also took place over the phone slightly less than two

weeks after our initial in-person conversation. The interview consent form signed by each participant explicitly held open the possibility that I would send email after the initial interview with a written list of follow-up questions. In the course of reviewing my transcript notes, I identified a section in one interview with a network executive leader where additional probing would have been warranted. Accordingly, I sent an email requesting clarification and elaboration, and the subject replied with a written response.

Six interviews were conducted with administrators based in these networks' satellite regions. These interviews ranged in length from 65 to 75 minutes. The primary purpose of these interviews was to ascertain how the central office leaders' attempts to create coherence were being perceived on the ground and whether those actions were leading to the development of a unified institutional direction and to the cultivation of collaborative cultures. Burke (2014) has argued that data collection efforts within "loosely coupled" systems must take into account the existence of "multiple stories" by soliciting the perspectives of key stakeholders on topics implicating organizational clarity and culture (p. 438). Accordingly, these interviews were designed to allow me to assess the extent to which central offices and expansion regions appeared to share similar priorities, utilize common terminology, and possess a similar understanding of how they could work together to promote their organizations' missions.

To account for the possibility that network executives might hand-select a regionally based interview subject predisposed to speak sympathetically about the CMO's efforts, I requested to speak with the network's titular 'executive director' within a given region. For four of the five networks (Playstead Prep, Cadence Collegiate, Perennial, and Reservoir Academy), I interviewed the lead (or co-lead) administrator for one of their satellite regions. Three of those interviews took place in person; as all Cadence Collegiate data collection activities had to be

conducted virtually in order to comply with the network's Covid restrictions, the interview with

its regional administrator was conducted over the phone. Eclipse did not have a designated

executive lead in its satellite region, and Lovell shared that they believed my study's aims would

best be served by interviewing two members of the network's regional team. Those interviews

took place in person.

Table 2. *Interview Subjects, Durations, and Formats*

Role	Name	Network	Duration (Appx.)	Format
CMO Chief Executive	Gilbert	Playstead Prep	70 minutes	In-Person
CMO Chief Executive	Channing	Cadence Collegiate	70 minutes	Telephone
CMO Chief Executive	Lovell	Eclipse	90 minutes	In-Person
CMO Chief Executive	Winslow	Perennial	70 minutes	In-Person
CMO Chief Executive	Holt	Reservoir Academy	60 minutes	Telephone
Regional Administrator	Patrick	Playstead Prep	70 minutes	In-Person
Regional Administrator	Rogers	Cadence Collegiate	70 minutes	Telephone
Regional Administrator	Collins	Eclipse	70 minutes	In-Person
Regional Administrator	Potter	Eclipse	65 minutes	In-Person
Regional Administrator	Vaughn	Perennial	70 minutes	In-Person
Regional Administrator	Cutler	Reservoir Academy	75 minutes	In-Person

Nonparticipant Observations

An indispensable analytical method in qualitative research, observations consist of the

"systematic noting and recording of events, behaviors, and artifacts . . . in the social setting

chosen for the study" (Marshall & Rossman, 1994, p. 79). Contrasted with self-reported data

gleaned through interviews, observations allow a researcher to obtain "a more accurate

indication" of a phenomenon in action (Fraenkel & Wallen, 2006, p. 450), and are designed "to

discover complex interactions in natural social settings" (Marshall & Rossman, 1994, p. 80). An individual who functions as an "observer-as-participant" discloses his or her research purpose to those being observed and makes no meaningful attempt to engage in the activities being chronicled (Fraenkel & Wallen, 2006). The mere presence of a researcher who divulges his or her identity and objective is likely to affect the behavior of those being observed (Fraenkel & Wallen, 2006). To mitigate this "observer effect," researchers must be cognizant of the impressions they are making and remain both unobtrusive and sensitive to their surroundings (Creswell & Poth, 2018).

For this study, I sought to conduct in-person interviews within the CMO leaders' expansion regions in order to allow for observations in a milieu that would add color to their self-reported descriptions of how they attempt to focus direction and cultivate collaborative cultures across geographical and cultural gulfs. Consistent with the Covid-19 health and safety protocols they had implemented, four of the five networks participating in this study (Cadence Collegiate being the exception) allowed me to conduct in-person observations. Accordingly, I traveled to a satellite region affiliated with each of those four networks on a day that coincided with a visit from their respective CEOs. In each region, I spent time at a network-affiliated campus observing instruction, classroom setup and school signage, and student-staff interactions. I conducted joint walkthroughs of Reservoir Academy and Eclipse campuses in satellite regions with Holt and Lovell respectively, carrying on informal conversations as we worked through the buildings and debriefing at the end of my visits. I also observed an off-site board retreat in a Perennial region. Although I did not accompany Winslow on a walkthrough of a Perennial campus, I had an opportunity to debrief my campus visit with the network's regional leader (who later sat for a formal interview) as well as two other members of the regional team.

Cadence Collegiate's Covid protocols precluded in-person observations. Accordingly, I attended a virtual meeting of a regional school board (i.e., the governing body of a network-affiliated school in a satellite region) at which the network's CEO was an active participant. I similarly attended a virtual meeting of a Playstead Prep regional school board. During both meetings, which were publicly noticed and subject to open meeting requirements, I remained largely off-camera and with my microphone muted so as to limit my presence and minimize any potential impact my presence may have had on the board's conduct.

Document Analysis

As a research method that provides empirical evidence about the nature and sources of complex issues, document analysis has particular salience within the qualitative tradition and is uniquely well-suited to case studies in the education leadership field (Bowen, 2009; Cardno, 2018). Documents such as manuals, meeting agendas and minutes, and correspondence provide critical information about the context and culture of the institutions in which study participants operate (Fitzgerald, 2012). Analysis of documents allows a researcher to track change and development, to suggest questions that should be posed and situations that would warrant observation, and to probe beneath the surface-level information that may be provided by cautious interview subjects (Bowen, 2009; Fitzgerald, 2012).

To facilitate the transmission of documents for review, I created and shared a restricted Google Drive with each charter network executive as well as any members of their respective teams identified as likely to be able to locate and supply pertinent materials. I also created and shared a document review request form that outlined a representative list of materials I was hoping to receive. Among the pertinent documents reviewed for this study were charter applications, network policy manuals, expansion greenlighting criteria, board retreat

presentations, management agreements (i.e., contracts for CMO support services), and observation protocols used by central office personnel during campus visits. To the extent possible, I attempted to review documents prior to conducting interviews and observations on the theory that the documents themselves would illuminate potentially fruitful lines of inquiry and highlight areas that would benefit from more searching exploration. However, the timing of the document transmission did not always permit pre-interview reviews.

Data Analysis

Data analysis refers to the process of deriving "order, structure, and meaning" from the collected data (Marshall & Rossman, 1994, p. 111). According to Marshall and Rossman, the data analysis unfolds in five phases: (1) organizing data; (2) generating categories, themes, and patterns; (3) testing hypotheses; (4) searching for alternative explanations; and (5) writing the report. The category generation phase requires the researcher to uncover patterns, themes, and categories by identifying recurring language, motifs, and beliefs (Marshall & Rossman, 1994). The coding process consists of a researcher examining a piece of recorded data and labeling it with a word or short phrase that summarizes its content (Linnenberg & Korsgaard, 2019). An effective coding scheme is based on the story a researcher is attempting to convey (Stuckey, 2015). Researchers may use deductive coding schemes that make use of an *ex ante* framework rooted in the relevant literature, inductive coding schemes whose categories are dictated by the words and themes that appear in the data, or a "blended approach" that fuses the two (Linnenberg & Korsgaard, 2019).

Inductive coding schemes are typically utilized when researchers conduct conventional content analyses (Hsieh & Shannon, 2005; Kondracki et al., 2002). Qualitative content analysis is an analytical method that allows researchers to systematically classify textual data into "an

efficient number of categories that represent similar meanings," thereby allowing for the identification of themes or patterns (Hsieh & Shannon, 2005, p. 1277). The conventional approach to content analysis is suitable for exploratory studies, where the process of attempting to describe a phenomenon lends itself to a coding scheme driven by the data as collected (Hsieh & Shannon, 2005). Researchers using this method examine the texts "without imposing preconceived notions or categories," allowing the participants' perspectives to drive the categorization and coding processes organically (Hseih & Shannon, 2005, p. 1279; Kondracki et al., 2002).

The validity of a study hinges on the reliability of the inferences drawn from the data it produces (Fraenkel & Wallen, 2006; Schreiber and Asner-Self, 2011). Triangulation (i.e., collecting data using a variety of methods and instruments) strengthens the validity of a study by mitigating the limitations of each data collection method in isolation (Fraenkel & Wallen, 2006; Schreiber & Asner-Self, 2011). The "self-reports of attitudes and behaviors" generated from interviews, for example, are "of limited value in explaining what people actually do because they are overly psychological and abstracted from lived experience" (Jerolmack & Khan, 2014. p. 181). Researchers whose presence is viewed as suspicious, unwelcome, or simply unfamiliar may alter the interpersonal dynamics of the activities being observed (Fraenkel & Wallen, 2006). And documents created independent of a research agenda may be incomplete, subjective, and biased (Bowen, 2009; Cardno, 2018; Fitzgerald, 2012). Triangulation helps correct for these limitations by allowing a researcher to examine each individual piece of evidence to be examined in the context of other sources and to seek convergence and corroboration through analysis of complementary data (Bowen, 2009; Fitzgerald, 2012).

For this study, I transcribed my interview notes in real time and cleaned them up while memory of the conversations remained fresh. Similarly, I utilized an observation log to collect real-time data during all in-person and virtual observations. Subsequently, I read through the interview transcripts, observation logs, and extant documents to identify pertinent information and to generate a coding scheme. Although I initially considered using a computer program to assist with the coding process, I ultimately decided that coding the data by hand—an approach with which I have greater comfort and expertise—would generate a more accurate categorization. As this study aimed to explore and describe a specific phenomenon, I conducted a conventional content analysis using an inductive approach to coding the data. That is, after reading through and annotating print-outs of the interview transcripts and observation notes multiple times, I created a categorization scheme based on the themes and patterns that emerged from the data themselves. By triangulating data from the literature review, observations, artifacts, and interviews, I sought to strengthen the validity of the classification system used for coding purposes and to enhance the credibility of the study's findings.

Role of the Researcher

Having seen firsthand the manner in which federal- and state-level funding and policy mechanisms incentivize the expansion of multistate operators, and having been part of countless conversations about the potential benefits (and drawbacks) of interstate replication, I understand the dynamics that lead operators to contemplate such an undertaking. My experience as a CMO executive allowed me to recruit participants for this study and has afforded me opportunities to work in a support capacity across the charter sector; I have provided consulting services to two of the five networks that participated in this study, and I partnered with representatives from a third on the implementation of a grant project. This personal familiarity brings the research on

charter replication and organizational coherence to life and affords me unique insight into the nexus between theory and practice.

The greatest potential challenge of studying a topic with which I have a great deal of familiarity was the risk of susceptibility to confirmation bias. I had to guard against the notion that my experiences were broadly generalizable or in any way universal when conducting a case study of other multistate operators. While it would certainly would have been surprising to speak with a CMO leader who had not encountered any hardships when attempting to create coherence within their organization, I needed to accept the possibility that such a finding was at least theoretically plausible. Similarly, while I would have been intrigued by a consensus among regional leaders that their respective CMO headquarters had been perfectly responsive to the unique needs of their communities, I needed to create valid data collection instruments and to allow whatever information they yielded to stand on its own.

My main hope for this study is to contribute to the growing understanding of how educational leaders confronted with the daunting challenges inherent in running multistate charter networks can improve their practice. I have a deep and abiding respect for the professionals—both within network central offices and within the satellite regions of multistate CMOs—who are grinding through these challenges on a daily basis and working tirelessly to provide children with opportunities to maximize their potential. Rather than set out to demonstrate the futility of educational leadership within this surpassingly difficult paradigm, I hoped to draw attention to the discrete challenges faced by educational leaders whose organizations have been incentivized to expand in certain ways, to point out some of the more common pitfalls to which they are vulnerable, and to highlight some of the ways in which these leaders are crafting coherence, building trust, and creating sustainable organizations.

Limitations

This study focuses exclusively on the challenges confronting the leaders of multistate charter networks, a comparatively small (though influential and growing) subset of all educational leaders. Accordingly, this study is delimited to a specific sample population whose perspectives have historically not been centered within the academic literature. Moreover, the limited nature of the observation windows as well as the restrictions on in-person access imposed by Covid-19 health and safety protocols may have resulted in collected data that were not representative of how the CMO leader ordinarily engages when visiting an expansion region.

Summary

The purpose of this study is to explore the manner in which leaders of multistate charter networks navigate the disparate policy landscapes, operational conditions, and stakeholder expectations that characterize the communities in which their schools are located. To address the study's research questions, I conducted a collective case study with five multistate charter leaders serving as participants. Semi-structured interview guides were used to collect data from 11 participants—the 5 charter network executives and 6 administrators based in one of their respective networks' satellite regions. Additional data were collected from in-person and virtual observations (including campus walkthroughs, off-site board retreats, and board meetings) as well as from document review. Data were triangulated and analyzed using a conventional content analysis. The study design centered the perspectives of the stakeholders charged with navigating the assorted challenges that can impair an organization's efforts to operate effectively in more than one state, highlighting some of the ways in which they are crafting coherence, building trust, and creating sustainable organizations.

Chapter 4: Findings

Introduction

This study explores the manner in which leaders of multistate charter networks navigate the disparate policy landscapes, operational conditions, and stakeholder expectations that characterize the communities in which their schools are located. Its design was guided by the following two research questions:

(1) How do the leaders of multistate charter networks navigate the disparate policy landscapes, operational conditions, and stakeholder expectations that characterize the communities in which their schools are located?

(2) How do the leaders of multistate charter networks attempt to create coherence within their organizations?

The collective case study methodology permits the exploration of a phenomenon within and across a range of settings, providing multiple perspectives and engendering a more robust understanding of the phenomenon under exploration (Arghode & Wang, 2015; Au & Blake, 2003; Baxter & Jack, 2008; Scheib, 2003; Yin, 2009). Accordingly, analysis of the data collected through interviews, observations, and document review revealed areas of both commonality and dissonance and resulted in the emergence of discernible trends. Examining the participants' lived experiences in this fashion produced findings that offer robust insight into how the occupants of a unique position within the field of education leadership conceptualize and execute their roles.

The key findings in this chapter are presented as follows. First, I explain why the leaders of these unique school systems elect to embark on multistate expansion efforts. Second, I explore

the range of leadership challenges presented within the multistate paradigm. Next, I describe the strategies these leaders have adopted in an effort to create organizational coherence within the multistate construct. Then, I create a composite picture of the successful multistate charter leader by synthesizing the key attributes possessed by the study participants. And finally, I use pandemic-era schooling as a case study through which to examine both the challenges inherent in multistate leadership and the strategies for creating organizational coherence developed and deployed by these leaders.

Impetus for Multistate Expansion

Given the multitude of discrete operational, political, and financial challenges presented within the multistate context, the threshold question for the leaders of these organizations is why they elect to structure their school systems in this fashion. In addressing this line of inquiry, leaders invoked both intrinsic organizational considerations (e.g., how operating in a multistate manner promotes fulfillment of the organization's mission and contribution to broader societal change) and extrinsic environmental considerations (e.g., community receptiveness, political tailwinds, and financial support). In this section, I explore the rationales for multistate expansion proffered by study participants, starting with the "push" factors that inspire leaders to consider interstate growth before proceeding to the "pull" factors that compel leaders to consider siting replication schools within specific communities.

Intrinsic Organizational Considerations

Each of the five network leaders participating in this study cited growth as central to the pursuit of their organizations' respective missions. For some of these organizations, operating in a range of different settings was described as the natural way to self-actualize. For others, the overriding impulse to grow ultimately resulted in the development of an interstate model when

market realities (e.g., charter caps, finite enrollment demand, facilities scarcity, etc.) curtailed growth within a given community. Regardless of whether interstate expansion was part of the organization's original vision or simply a byproduct of the operational landscape, these leaders were clear that they always envisioned their organizations making an impact beyond a single school site.

The leaders of Playstead Prep and Cadence Collegiate described their networks as having growth-oriented models more conducive to breadth than to penetration within a single community. Gilbert described the Playstead Prep model as having a "critical distinctive component" that makes it compatible with operation in a multitude of settings:

> From the beginning, rather than concentrating in a single [geographic] area, the idea was to be in a variety of regions and to be very conscious of the idea that we were not only helping to support the academic achievement of the students we served through the model but secondarily providing a pipeline of talent to that school and the community around it.

Channing characterized the Cadence Collegiate model as "artisanal." The network's mission revolves around building a "movement of schools," but its niche appeal places a ceiling on the number of schools it can realistically open and operate within a given community. Accordingly, the network determined that fulfilling its mission would require it to launch directly operated schools in satellite regions.

Holt paraphrased the educator and psychologist Anna Gillingham in relating that Reservoir Academy grows "as fast as we can but as slow as we must." As Farrell et al. (2014) and Wohlstetter et al. (2011) have explained, philanthropic partners within the charter sector have helped catalyze the growth of CMOs by providing financial support for the growth of networks whose size and scale allow them to drive systemic change. As the chief executive of a network that has benefited from such support, Holt acknowledged that "being large and having heft helps ... especially when you're looking for philanthropy." Holt shared that being a large

network helps attract support from institutions looking to make a "larger impact" with their grantmaking. That size, in turn, allows Reservoir Academy to exert a "disproportionate impact" on the communities in which it operates.

Winslow and Lovell situated their organizations within the broader educational firmament and sketched a vision for how their schools could play a role in effecting broader societal change. Winslow described Perennial's role as responsive to a dire educational *status quo*: "You're low-income, you're Black or brown— you probably go to a shitty public school. I've seen it. We talk about a pandemic. We have an epidemic in this country." According to publicly available data, the school districts in which the networks participating in this study operate satellite region campuses are overwhelmingly composed of students of color. The population of white students attending schools in these districts ranges from 24% on the high end to 1% on the low end. The networks participating in this study enroll comparatively more students of color in their satellite region campuses than do the school districts in which they are located, with enrollment of white students at these network-affiliated schools topping out at 10%.

Perennial's growth was framed as a moral corrective to an unacceptable state of affairs. Winslow said those founding Perennial

> had a vision of there being a massive need in this country and a real belief and commitment that we could scale rapidly and do something about it. It was super inspirational. There was also a lot of hubris and arrogance there. We were naïve about what it would take, but it was really invigorating and exciting. There's a ton of need. How do you rapidly try to fill that gap, be disruptive, and help a lot of kids?

Perennial's internal documents indicate that the network deliberately attempts to "scale and concentrate in regions" so as to "create competitive pressure on existing schools to improve" and thereby to accelerate the creation of higher quality educational ecosystems. This national vision is reinforced at the regional level, where Perennial articulates a vision for impact that transcends

the traditional schoolhouse walls. As elucidated in the materials circulated at a regional board retreat, the network's vision within its satellite regions is to "catalyz[e] transformative change ... in partnership and friendship with like-minded organizations, influencers, and philanthropists." This vision statement supports Winslow's contention that the network operates in a manner consistent with its "current understanding of the value we bring to the charter movement." Accordingly, both at the network level and within its constituent regions, Perennial's self-conception as an agent of systemic improvement informs the way it carries out its operations.

In a similar vein, Lovell shared that Eclipse is animated by a belief that charter schools "have an obligation to contribute to the public good." Although Lovell is a successor leader at Eclipse who was brought into the chief executive role as an external hire, Lovell's own personal educational philosophy is consistent with the network's ethos. Lovell's initial skepticism of charters was rooted in the belief that they may solve for the needs of individual school communities without contributing to broader systemic improvements. Lovell views the public education system as inextricably intertwined with the other systems with which students and families interact; this perceived interdependence affects both how the network's schools operate and how the network itself has grown and evolved. Lovell stated that their undergraduate and graduate school focus on education made them "curious about the broader system." Lovell lamented that some

> practical, residency-based training programs miss the forest for the trees. They think it's about poor little Black babies, and I think it's about systems. [My training] centered my consciousness not just on *why doesn't Susie have a pencil?* and *why doesn't Bobby know how to read*? but on *why do Susies not have pencils?* and *why can't Bobbys read?* I didn't know whether there was a systemic solution to what I saw in my classroom. Healthcare, the justice system ... to ignore what's happening outside the schoolhouse is to your peril. The hubris that we thought we [education reformers] could be the complete solution just by controlling the schoolhouse ... I think it's a good management technique, but what we can't deny as leaders is that what happens does affect our kids. It doesn't absolve us, but it's connected.

For Lovell and the other study participants, network growth is a mission imperative. Whether their networks are expanding horizontally (i.e., across communities), vertically (i.e., within communities), or both, these leaders articulated visions of organizational impact in which growth is an essential ingredient. While the "pull" factors explored in the sections that follow play a role in determining where expansion occurs, these leaders and their organizations are motivated by personal conviction and institutional theories of change to pursue growth.

Extrinsic Environmental Factors

Network leaders whose organizations are committed to growth reckon with a panoply of factors when deciding where to situate their campuses. Three of the study participants explicitly referenced a set of internal greenlighting criteria that formalize the process of determining whether to pursue growth in a new or existing region. Reservoir Academy's greenlighting criteria include 17 total indicators within five domains: Demand, School Budget & Financial/Facility Resources, Implementation, Political and Community Environment, and Approvals & Ongoing School Compliance. The "Implementation" domain encompasses both the availability of talent within the region and the central office's capacity to support additional campuses. Perennial's greenlighting criteria consist of 10 indicators within three domains: Mission Alignment, Scale of Impact, and Catalytic Potential. The "Mission Alignment" domain encompasses market need and demand as well as student achievement data from existing network schools that demonstrate an academic health warranting further growth; the "Scale of Impact" domain encompasses access to facilities and talent; and the "Catalytic Potential" domain encompasses community support and the community's funding landscape. Cadence Collegiate's chief executive provided a checklist of six greenlighting criteria that included funding adequacy; a favorable authorizing climate; and student, staff, leadership, and board pipelines.

Based on their salience within these greenlighting criteria and in the interviews with the study participants, three of these "pull" factors that entice operators to consider expanding into a new market stand out: community receptiveness, political tailwinds, and financial support.

Table 3. *Expansion Greenlighting Criteria by Network*

Criterion	Cadence Collegiate	Perennial	Reservoir Academy
Community Support	✓	✓	✓
Enrollment Pipelines	✓	✓	✓
Facilities	✓	✓	✓
Funding (Public + Private)	✓	✓	✓
Home Office Capacity			✓
Political Climate	✓	✓	✓
Programmatic Feasibility	✓		✓
Talent Pipelines — Governance	✓	✓	
Talent Pipelines — Leadership	✓	✓	✓
Talent Pipelines — Teachers	✓	✓	✓

Community Receptiveness

All five study participants cited community receptiveness as an essential precondition to their entry into a new jurisdiction. To the extent that charters are schools of choice into which parents must affirmatively opt to enroll their children, this is unsurprising; without sufficient evidence of demand among families within the target demographic, charters dependent on per-pupil revenues to support their budgets may be leery of committing resources to a venture seen as operationally risky. The leaders in this study described looking for opportunities to marry their organizational missions with the extant conditions in a given community. Gilbert described Playstead Prep's growth as "very driven by where there was perceived to be a need." According to Channing, the satellite region into which Cadence Collegiate expanded when it crossed state

lines was characterized by "a paucity of good school choices for families." Channing added that the network has not struggled to recruit students in its satellite region.

A particularly warm community embrace might supersede other considerations and prompt a network to expand into a state whose operating environment is otherwise not overly hospitable to charter operation. Lovell recalled a "chorus cry" of supporters within the network's satellite region imploring Eclipse to consider being a part of the solution to their community's educational needs. Collins offered a similar recollection, sharing that "the community was receptive in that way like, 'Please take my child.' ... We were committed in a way they hadn't seen from other educators who had become complacent. People were loving our new energy vibe." Lovell alluded to a hypothetical set of greenlighting factors and surmised that the state into which the network expanded would "rank last." Nevertheless, Eclipse was "happy to be a part of" the solution sought by the community's residents, so the network expanded into a state with a "lower per-pupil and a horrible charter law."

Political Tailwinds

The essential bargain that underpins charter schools as a reform vehicle is increased autonomy in exchange for heightened accountability. However, the extent to which state and local policymakers afford charter operators the autonomies they seek is highly variable. Accordingly, study participants emphasized the importance of expanding into jurisdictions with favorable political climates that allow them to execute their models as envisioned. Holt, for example, alluded to the "danger" of authorizers worrying "more about regulating than about what [they] can do to help you succeed" and expressed a hope that "authorizers continue to see themselves as biased toward success and not biased toward bureaucracy."

Furthermore, the acrimony that routinely accompanies the proposed arrival of a new charter operator into a community has conditioned leaders to seek political cover from elected officials and system leaders. Channing shared that Cadence Collegiate had to "really fight tooth and nail to get approved" within a satellite region where its school is authorized not by a state-level agency or an independent chartering entity but by the public school district, a dynamic described as "complex and at times hostile." Gilbert recalled being recruited into potential satellite regions by their states' respective governors and said that a "strong political current," "good support from elected officials," and "the political will to get a charter enacted and authorized" has helped Playstead Prep overcome organized opposition to its expansion efforts. Holt evinced a similar weariness and mused that "it's always going to be a fight, but how tough a fight will it be in terms of the political ecosystem, the superintendent, the mayor, the city council, local community organizations, the state?"

The vicissitudes of political power are such that operators who commit to an interstate expansion effort based on the prevailing conditions at a specific moment may find themselves bereft of influential allies once their schools are operational. Holt noted that a Reservoir Academy satellite region that had once been characterized by an "alignment around the governor, the state legislature, and the state department of education" and a "real willingness to allow charters to flourish" is now "a quite inhospitable place to grow." Similarly, Winslow noted that Perennial had embarked on an expansion effort when "the mayor and the school district were quite welcoming." The tides eventually shifted, and Winslow acknowledged having "underestimated the politics. The mayor was out, the school board was out, and we were stuck." Those developments, Winslow said, have forced Perennial to "[center] in on our theory of

change and become super clear about which regions, how we select, what we're looking for, what conditions are right, what aren't."

Financial Support

Study participants also pointed to a market's funding landscape as a crucial consideration. Leaders spoke to the importance of a jurisdiction's base funding formula (i.e., whether the per-pupil allocations are sufficient to support the implementation of a model developed elsewhere) and identified the availability of supplemental revenues (e.g., from private foundations or from public programs like Race to the Top or CSP) as a meaningful inducement.

Channing referenced an intermediary organization that provided financial support for both a market feasibility study in the network's satellite region and "several years of operational support, without which we couldn't have done the work." Gilbert similarly cited meaningful philanthropic support as a dispositive factor in Playstead Prep's expansion decisions. For these leaders, the provision of these philanthropic start-up funds is non-negotiable. Gilbert recalled abandoning an expansion effort when a funder being relied upon to provide start-up support equivocated. In Gilbert's telling, the funder

> balked at giving the funds and said, 'If you open, we'll see.' We were counting on those funds to have the ability to open. Without them, I made the painful decision to pull the application and not move forward. In hindsight, it would have been a disaster. We were not set up for success there.... We're ambitious and idealistic but this was just too much. The next year, [the state] ran out of money for charters halfway through the year. If we had gotten it, it would have been chaos.

For the leaders whose networks expand across state lines, the benefits of scale outweigh the risks of geographic dispersal. To mitigate foreseeable areas of exposure, leaders assess the extent to which new communities appear ripe for their networks to enter and to succeed, occasionally allowing the overwhelming presence of one or more variables to eclipse the absence of others when making decisions about growth.

Leadership Challenges Presented by the Multistate Paradigm

Having made the decision to operate schools in multiple states, these network executives face a battery of challenges unique within the field of educational leadership. In this section, I first examine how divergent regulatory, funding, political, and cultural environments pose discrete challenges for multistate systems. Then, I explore how network structure, including a central office apparatus physically removed from—and perhaps perceived as insufficiently attuned to the needs of—satellite regions compounds these challenges by sewing mistrust between network-based and regional staff. The process of creating coherence is sufficiently complicated in the conventional setting as to warrant serious exploration by educational researchers. The challenges unique to the multistate paradigm, which supplement rather than supplant those faced by the leaders of traditionally structured school systems, add another layer of difficulty to that process.

Differential Regulatory Environments

Honig and Hatch (2004) have explained that the process of creating coherence within educational organizations requires central office and campus-based leaders to calibrate goals and strategies that respond to a complex web of external demands. This process becomes considerably more difficult when these external demands are materially different across network campuses. Educational policymaking in America occurs principally at the state level. Accordingly, comporting with the dictates of each state's regulatory environment necessarily forces multistate networks to modify elements of the very model that made them attractive candidates for replication. The need to remain compliant with incongruous policy frameworks poses challenges for leaders seeking to create the sense of "systemness" that permeates coherent organizations. As Winslow recalled about Perennial's foray into an expansion region: "There

were nuances we didn't know, and they were really complex, and we were having to scramble and figure out how you integrate it all into the systems we have, or not, and how does it all work?" Study participants identified an array of domains in which a satellite region's regulatory environment may differ meaningfully from the regulatory environment in which their models were conceived. These domains include (1) instructional programming, (2) staffing, and (3) equity and access.

Instructional Programming

CMO and regional leaders identified challenges associated with the process of adapting a network's instructional model to align with different states' curricular mandates and assessment regimes. While electing to operate exclusively in states that have adopted the Common Core (either in name or in spirit) alleviates some of the headaches that would otherwise accompany the process of modifying a curricular program to ensure alignment with state standards, the idiosyncrasies of each state's system nevertheless require networks to make curricular modifications. For example, Holt shared that Reservoir Academy considers some math skills to be "universal" under the Common Core but makes specific modifications within regions to account for the structure of states' year-end assessments.

This adaptation process is not always seamless. During a data presentation at a Cadence Collegiate regional board meeting, Rogers explicitly alluded to the challenges associated with aligning a curricular program designed in the network's flagship region to the "exam stems" on the year-end assessment administered in its satellite region. Similarly, Vaughn shared that Perennial had encountered regional challenges after "taking wholeheartedly" the curricular resources developed in the network's flagship region without realizing that those materials did not align perfectly with state standards or the state assessment. Referencing the two most

prominent Common Core assessment consortia, Winslow acknowledged that "PARCC and SBAC are very different. They're both Common Core, but there are unique things that you have to adjust for."

Eclipse's central office and regional leaders expressed somewhat different views about the importance of state assessments in shaping curricular decisions. Charter authorizers generally rely heavily on state exam data when conducting their oversight duties and determining whether to allow a given school to remain operational at the expiration of its term. Accordingly, with the specter of high-stakes renewal decisions perpetually looming over schools licensed to operate only for a few years at a time, leaders are highly sensitized to fluctuations in those assessment outcomes. However, the need to generate short-term state assessment results that meet an authorizer's performance standards may come into conflict with a network's long-term theory of change. Lovell offered a clear perspective on this tension:

> If you tell our origin story, people will talk about Common Core. For me, drill and kill on state tests can get you impressive results, but it doesn't translate to the bigger picture. I'll be dissatisfied bragging about how well our kids did on state tests if 10 years from now those kids can't do shit in college.

Collins opined that the regulatory apparatus in Eclipse's satellite region "lives and breathes" with state exam data. Science is a tested subject in Eclipse's satellite region but not in its flagship region, a difference that Lovell correctly predicted Collins would cite when discussing issues associated with adapting the network's curriculum. Lovell, however, suggested that maintaining a curriculum aligned to the state test is merely a "nice to have." Lovell opined that Eclipse's regional leaders "are overly concerned with tactical things," and shared that when selecting a science curriculum,

> I'd rather start with what's worthy of our kids and then consider alignment with the state test. The question being asked is, "What aligns to our end-of-year test?" Not, "Wouldn't it be great if you learned science through experimentation every week? How amazing would that be?" That's the conversation I want our [regional leaders] to have. If

they think about their own children, they don't ask what's aligned to state test scores. Parents will choose the science lab one over what's aligned to the state test. If we start from that place, we can figure out what's pragmatic.

In this fashion, differences in state assessment systems can surface practical and philosophical tensions within a multistate network's instructional program.

Staffing

Regulatory environments also shape the manner in which multistate networks staff their schools. Licensure is the regulatory domain that most directly influences how a network attempts to translate its staffing model from one state to another. Beyond certification, instructional calendars that are not synchronized from state to state also have an incidental impact on efforts to provide professional development that builds the capacity of regional teams, and leaders affiliated with multiple networks reported having to adjust their staffing models to have sufficient bandwidth to handle a region's distinct accountability requirements.

Adherence to multiple states' teacher licensure regimes poses challenges for networks attempting to replicate their staffing models in different settings. Lovell noted that ensuring compliance with certification requirements is one of the only reasons Eclipse has modified its policies from one region to another, while Holt lamented state certification requirements that take into account candidates' undergraduate GPAs, a screen that Holt believes filters out mission-aligned candidates of color who would otherwise be attractive to Reservoir Academy's hiring managers. Perennial's national and regional leaders both remarked on how certification requirements can hamper replication efforts. Winslow called certification "a killer," while Vaughn noted that teacher licensure "is always a struggle" in Perennial's satellite region given that "so much depends on one's ability to pass the Praxis." Vaughn also cited differences in requirements around maintaining minimum ratios of educators certified to teach English Learners (ELs) and said that state-level requirements for charter school building leaders to

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possess administrative licensure "really shut down the talent pipeline" in those markets. With respect to the former, Vaughn shared that "parameters forced by the state in terms of EL programming" required the network's satellite region to "make tweaks" to its staffing structure and to "have extra roles that are not part of Perennial's traditional model" after "being brought under fire" for noncompliance with state requirements.

Perennial's regions operate on staggered instructional calendars, meaning that schools in one region may welcome back staff and students weeks before schools do so in another. Winslow related that the "timing is really hard," as the central office may not be fully prepared for the start of the new school year by the time the satellite region needs it to be. Winslow explained that Perennial often "tries to build around the region" when designing in-service trainings for school leaders, but Vaughn shared that the temporal disconnect "has hindered us on occasion," with regional staff being unable to attend network-wide development sessions.

Charter schools are held accountable for academic, organizational, and financial performance by a range of public and private entities including their authorizers; federal, state, and local administrative agencies; and private grant-makers, lenders, and landlords. To the extent that each state's regulatory regime consists of different reporting requirements, networks occasionally find themselves in a position of having to adjust their staffing models to account for compliance work that does not lend to economies of scale. At a meeting of Cadence Collegiate's regional board, Rogers reported having recently launched a search for a compliance coordinator whose portfolio would encompass only those external accountability requirements unique to the network's satellite region. Rogers noted that the central office team's expertise was largely confined to the accountability regime in place in the flagship region and that it was "hard to keep up" with the requirements imposed by the various entities with oversight responsibility vis-à-vis

the satellite region. Rogers called the area "high risk" and justified the creation of a new role by explaining that remaining on top of the myriad reporting requirements was "not an effective use of our time" for the team as constituted. Similarly, schools in Eclipse's satellite region—unlike those in its flagship region—are considered their own Local Education Agencies (LEAs). Potter noted that this structure requires Eclipse to "staff a role to focus on the regulatory environment" and to handle the reporting, inventory management, and food and transportation services that the traditional public school district provides for network schools in its flagship region.

Equity and Access

Differences in state regulatory environments also affect both the demographic composition of network-affiliated schools and the extent to which all students enrolled at a given school are fully included in its learning environment. Several leaders noted that the student populations in their satellite regions differ from those in their flagship regions. Rogers shared that the demographics in Cadence Collegiate's satellite region are "totally different" than in its flagship region, and Channing concurred that the region has a student body that is "on balance substantially higher need" than at other network campuses. Collins said that the intensified demand for Eclipse's instructional offerings in its satellite region can spark internal conversations: "That's when you get into equity. 'How many kids y'all teaching and you have the same staffing model? We need more!' That's what would be fair and right for kids."

Variations in grade configurations also contribute to potential modifications in a network's instructional and operational models. A persistent internecine debate within the charter sector concerns the extent to which schools should "backfill" open seats with students who might pose "challenges to school culture and academic outcomes" (Hill & Mass, 2015, p. 7). Whereas most states afford charter operators autonomy in this sphere, Holt shared that when Reservoir

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Academy opened a high school in its satellite region, it was required to backfill open seats with students from the district. As this mandate was foreseeable, Holt shared that it was "not surprising, we just needed to adjust." During a co-observation of a math classroom in a satellite region, Holt also shared that the network makes slight modifications to its grade 5 curriculum "based on the starting point of where kids enter the system." Whereas grade 5 is the natural entry point for Reservoir Academy students in some regions, the network operates other schools with K–4 feeder systems, and the presumption is that students who have been with the network since early elementary school will have fewer knowledge and skill deficits in need of remediation.

Potter hazarded that the "biggest challenge" in Eclipse's satellite region pertains to its grade sequence. The middle school model developed in the network's flagship region spans grades 5–8. Eclipse attempted to replicate that model in its satellite region where local elementary schools run through grade 5. Potter observed that "asking families to pull their students out in their last year of school instead of waiting for the natural break" has posed a "significant challenge" with respect to grade 5 enrollment in Eclipse's satellite region. In a similar vein, participants at Perennial's regional board retreat inquired as to whether the network's elementary school grade configuration posed a disadvantage in a region where many schools offer parents certainty from grades K through 8. Vaughn suggested in an interview that it has "yet to be determined how we mitigate" the challenges associated with adapting a model honed in a setting where K–5 schools predominate. In its flagship region, Perennial works to empower parents to advocate for high-quality middle school options. When wondering how Perennial should translate that model to its satellite region where parents satisfied with their elementary schools can simply keep their students enrolled through the middle school grades, Vaughn posed a rhetorical question with existential undertones: "What is our theory of change? I

think that's what we have to figure out." Notably, in 2021, Perennial submitted an application to amend the grade-level configuration of a school in its satellite region from K–4 to K–5. The rationale put forward in the application was that the proposed change would bring the school into alignment with research conducted by the local district regarding student outcomes and parent preferences.

A key regulatory consideration cited by national and regional leaders of two networks is whether a charter school is considered an LEA under the Individuals with Disabilities Education Act (IDEA) for the purpose of identifying, educating, and paying for services for students with disabilities. In each of these networks, schools in the flagship region operate in a regulatory environment in which the district is the LEA while schools in the satellite region are their own LEAs. Rogers shared that this paradigm shift results in Cadence Collegiate's satellite region "carrying much more [responsibility] at the school level." Channing echoed this sentiment, sharing that differences in how special education services are delivered leads to "profound differences" in how the network's model is deployed. Holt noted that working in collaboration with a district LEA can pose some challenges when trying to secure evaluations and services but also "absolves" schools of some responsibility. By contrast, schools that are their own LEAs, like those in Reservoir Academy's satellite region, "have to figure it out" on their own and make sure that their students with disabilities are receiving the supports and services they need to be successful.

Study participants also addressed state-level differences in the extent to which charter operators possess autonomy over their disciplinary practices. As Channing noted, "if you're looking at student discipline, the specifics around codes of conduct, how and when state code applies to charters—it's different everywhere." Collins shared, for example, that schools in

Eclipse's expansion region would have to pay for an expelled student to attend an alternative school within the district, a requirement Collins interpreted as functionally ensuring that the region "couldn't transfer over" the network's policy on exclusionary discipline.

Cutler, who had experience in Reservoir Academy's flagship region before relocating to a satellite region, said that differences in the states' respective disciplinary regimes are "poignant." The procedural safeguards in the satellite region, Cutler shared, are "much more intense." According to Cutler, the heightened due process requirements — which are formalized in the Student and Family Handbook distributed in the satellite region but which are omitted from the version of the Handbook disseminated in the network's flagship region — come with a silver lining:

> There's a sort of processing and dialogue that we have to go through that is much more labor-intensive. I don't think it's a bad thing. It's forced us to be as methodical as we can be and to be much more creative in how we respond to student needs using other actions and methods. But in instances where a child is hurting another child and is vowing to do it again, our hands are tied a bit.

Cutler shared that the CMO provides centralized guidance on the imposition of disciplinary consequences that is universally applicable for all network schools while state-specific procedures are provided as appendices. In essence, Cutler said, the network attempts to maintain consistency while accommodating modifications compelled by a given state's regulatory framework:

> The numbers might be a bit different—this action might warrant 1–2 days here and something else there—but the 20 steps up to that point are the same. We try to do it the same everywhere. What it looks like when a teacher needs support from a dean, what it looks like when a student enters the dean's office, what the phone call to the family should sound like: partnership and uplifting. If it gets to a certain point, then you have different guidance to follow for that last final step.

Funding

Interstate differences in educational funding mechanisms—both the absolute dollar amounts provided to schools on a per-pupil basis and the revenue streams to which charters have access—shape networks' efforts to replicate their models in new terrain. Leaders associated with three networks detailed how comparatively less favorable funding environments in satellite regions posed distinct challenges when attempting to adapt their programming.

Gilbert described Playstead Prep's satellite region as a "terrible place to operate a charter," with funding inequities being challenges "number one, two, and three." Strictly from a financial standpoint, the satellite region froze the school's per-pupil funding for four years, which put the school "in a real vise in terms of rising costs and stagnant revenues." Because funding depends on annual legislative appropriations, Gilbert mused that "if the legislature is feeling particularly ornery one year, you might be left wondering whether you're going to get enough money to fund your operations." In terms of access to dedicated funding streams, Gilbert noted that charters in the Playstead Prep satellite region do not have access to the facilities funding for charters that exists elsewhere, requiring schools to account for facilities costs out of their general operating budgets.[1] Echoing Gilbert's sentiment, Patrick shared that transitioning from a district role into a charter leadership capacity swiftly disabused them of the grandiose notions they had previously harbored about the perks of charter operation:

> When I got hired, I thought I was going to literally be able to do whatever I want. I think about a week in I was like, 'I'm just operating a public school with less funding. This sucks!' Reality set in, and it wasn't a great day.

Rogers bemoaned a funding environment in Cadence Collegiate's satellite region that is "drastically lower" than in the network's flagship region. With the network having honed a co-

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[1] According to a 2019 report, 18 states (including the District of Columbia) provide a per-pupil facilities allowance to charter schools (Ziebarth, 2019).

teaching model that is fiscally untenable on the reduced per-pupil allocation, Rogers said that

they would either "need to build an enormous fundraising machine or have to adjust [the model]"

in the satellite region. Channing concurred, sharing that the network's satellite region "cannot

support a model as robust as in other places" and consequently will not have certain positions on

staff that the model includes elsewhere. Beyond staffing, the realities of the "lower-funded

environment" caused the network to consider adjustments to its grade-level configuration. As

Channing explained, the lower per-pupil allotment meant Cadence Collegiate would have "to

think through what would be affordable in the model":

> There were some things we decided to stick with even though we knew it would be challenging for us financially. The most salient example is that many charters in [the network's satellite region] will open with multiple grades and what we would consider large opening enrollments to achieve economies of scale out of the gate. In [our flagship region], schools will typically launch with just K-1 because funding is robust enough, and you can also buy some time with CSP and Walton support to make it work. We stuck to our guns and opened with just K-1 and have been adding one grade each year.

Sketching an admittedly "awkward" metaphor, Channing invoked Maslow's Hierarchy of Need

to explain how disparities in educational funding impact Cadence Collegiate's ability to pursue

its mission in different settings:

> The building block might be that kids are safe, the building is orderly, etc. In the middle, you might have core outcomes around English and Math. At the top you would have the real actualization of mission, which for us is around global citizenship. If they're safe, engaged, coming to school regularly, taught by highly competent professionals, mastering literacy and numeracy skills, then we can reach for the achievement of the special part of our mission around second language acquisition, empathy, working in teams, all the things that for us constitute global citizenship. Our ability to do that is going to look different depending on student need and resources.

Accordingly, the fact that Cadence Collegiate's satellite region is "substantially resource-

constrained" jeopardizes the network's ability to actualize its full mission in that setting.

Both in absolute and comparative terms, Eclipse's satellite region is at a funding

disadvantage relative to its flagship region. Beyond the lower per-pupil allocation, Lovell rattled

off a litany of additional factors that make the funding ecosystem in Eclipse's satellite region less hospitable: "There's no access to facilities funding. No state bond program.... Schools have to provide transportation. There's no transportation funding. We have to provide food. There's no food service funding." Collins relayed that education is "never fully funded" in Eclipse's satellite region, compounding resource gaps among network schools that Potter said require some "to do a lot more with less money." Collins shared that schools in Eclipse's satellite region have enrolled additional cohorts of students at certain grade levels, theorizing that "we have to pack our house" in order to approximate the per-pupil revenues received in the flagship region.

Political

As noted, a political landscape and authorizer climate perceived as favorable is frequently cited as a key criterion in networks' expansion decisions. Nevertheless, whether due to shifting political tides or to an *ex ante* willingness to privilege other variables (e.g., community need) over durable political cover, networks occasionally end up opening schools in states without a *bona fide* commitment to the strength of their charter sectors.

In some instances, the political environment in the satellite region simply appears inimical to charter operation. Lovell said that the "broader trend" in Eclipse's satellite region is that they have "an authorizer who isn't imaginative" and who may quietly harbor "anti-charter" sympathies. Lovell expressed disappointment that Eclipse's decision to expand notwithstanding an unfavorable operating climate had not catalyzed a virtuous cycle in which the presence of stronger charter operators yields better policies, and so forth:

> Anyone looking from a strategic point of view would say, "Don't expand there until ..." and then leverage that to get the things you need to open. We didn't do any of that. The thinking was, "If you build it, they will come," instead of, "They will never build it if we do come." ... The thing that we underestimated was the lack of progress from the initial investment in establishing a charter law and the funding here. I think we were banking on the sector continuing to evolve, attracting philanthropy, gaining

momentum, that would reinforce the opportunity here. There's been no advancement in the charter law, no advancement in funding.... They haven't built an ecosystem or the conditions to attract high-quality operators to open here. We're going to lower the bar.

Channing described the climate in Cadence Collegiate's satellite region as "contentious" and the level of opposition to the network's arrival as "more pronounced," "louder," and "more voluble." Gilbert recalled being cautioned by a leading operator in Playstead Prep's satellite region not to expand there, while Patrick described the state as "very un-charter friendly." Patrick relayed that the state has "done more and more ... to force charter schools to operate as traditional public schools," stripping them of their autonomies and inhibiting them from innovating. A former school-based and central office administrator in the state's public school districts, Patrick had been a party to numerous conversations about the verdancy of the grass in charter land. What Patrick found, upon transitioning to Playstead Prep, was staggeringly different:

> It hurts because a lot of the myths about charter schools—myths from teachers' perspectives of you're gonna work from bell-to-bell, that you're gonna churn and burn through teachers, that you can kick a kid out if they're getting on your nerves—they're so not true. [My former colleagues in the district will] say, "It must be nice!" And I say, "We can't do any of that stuff! It's really not true." "Then why'd we get that kid?" "Because the parent withdrew them because they were about to get expelled for the same thing you would have expelled them for. The parent decided your school is garbage and that school is garbage, but at least I can leave this one."

Patrick actively attempts to counter these misperceptions when recruiting teachers by preemptively sharing information about benefits (including eligibility for state pensions) and work schedules with prep periods and data periods included ("so they can see they're actually teaching less even if they're here for longer"). Patrick expressed pride in the region's teacher retention rate.

In other instances, the political orientation of the policymakers who champion charters as alternatives to district-governed schools creates both moral and practical challenges for mission-

driven leaders. Lovell described this as the "strange bedfellows dynamic," one in which the school choice proponents "in the statehouse" who create the policy conditions that allow charters to proliferate espouse "very different" values from those that animate Eclipse as a network. Vaughn shared that the politics in Perennial's satellite region have become "very interesting" in that being "pro-education, pro-charter is controversial." The shifting politics in this satellite region were discussed at length during a presentation at Perennial's regional board retreat. Whereas education reform used to be "self-contained," board members were told that charters have become something seen as "conservative" and "patriotic." From a communications standpoint, board members were told that it would be important to conceptually "eject high-performing charters serving students of color out of that box."

Cultural

Even when not expressly instantiated in policy, the cultural mores of a region can impose hurdles for an outside operator attempting to gain traction in a new setting. These mores can manifest in a host of fashions. For Perennial, a transportation environment in which many students are bused to school has made it more difficult to connect with parents than in regions where students are dropped off and picked up at the door. "It's a difference in model that means a lot," Vaughn noted. Winslow added that "it's much harder to get to our parents because they don't have to come to the campus," which they described as "a really unique challenge we've had to work around." The differential housing markets in the network's regions has also rendered benefits (e.g., employee housing stipends) that make sense in one setting ill-suited for others.

On occasion, outside operators are greeted as unwelcome interlopers. Collins recalled in stark terms Eclipse being treated as "fresh meat" when it opened in a satellite region. Holt described ongoing pushback to Reservoir Academy's efforts to develop a new facility in its

satellite region as "disappointing and surprising. We feel like everyone's pro-education, pro-school, pro-good organizations doing a sensible job."

Network Structure

Beyond the challenges to the establishment of coherence within multistate networks caused by environmental factors, the manner in which these organizations are structured and staffed can cause internal strife. These rifts can take a number of shapes. Satellite regions may be on high alert for subtle signals that they are perceived as inferior within their institutional hierarchies, construing arguably benign occurrences as evidence tending to confirm their second-class status. The geographical distance between the central office braintrust and the satellite region's schools can stir resentment when network guidance is believed to be unfounded and policy directives are interpreted as culturally insensitive. And negative interactions with one or more members of the central office team can mushroom into broader skepticism about the network's ability to deliver responsive support services to satellite regions.

At Reservoir Academy, Cutler acknowledged that the perception of the network's "thought leaders" having come from another region has posed challenges. Cutler stressed that "what they perceive is not necessarily true, but it influences how they interact during the day." Elaborating on the point, Cutler shared that a different Reservoir Academy region had produced

> the most established, strongest schools that have over the years graduated up our best teachers, who have become the best fellows, who have become the best principals, who have become the best leaders of all these teams. There's a bias some of them might have toward [their] way. There's a very deliberate attempt by many to not do that or not project that, especially when they're spending time outside [their region], but it's there. I think a teacher has some general distrust in their mind knowing that those lesson plans they're supposed to take and internalize were scripted by someone in [another region]. All the people flying in to do my visits are flying in from [another region]. So that's a narrative that exists. For the most part, I think that's not an obstacle too great that it derails a school or communities within the school from striving to do all that work really well. It's a theme that surfaces every once in a while, the perception that something might

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not work well here or in my classroom. When coaching leaders, I coach them on how to navigate that, how to reinvest people, puncture their perception about it.

Vaughn shared that Perennial had experienced "turbulence" with central office teams that operate in a "restrictive, top-down" fashion and that insist upon unswerving implementation of a model as conceived and piloted elsewhere. Rogers said that while certain members of Cadence Collegiate's central office team appear "plugged in" and able to "offer good advice even if they're not deeply steeped in the way [our region] runs," others have caused regional teammates to express confusion about the apparent lack of understanding regarding the differential operating environment. Gilbert noted that central offices and campuses are perpetually responding to different stimuli, which makes it difficult for them to synchronize their schedules. These challenges, Gilbert explained, are "exacerbated when there's a distance between the central office and school." Gilbert described these issues as reciprocal: a campus dealing with "any one of 1,000 operational things" that arises on a given day might deprioritize responding to an email from the central office, while a central office representative who drives several hours to visit a campus only to find their counterpart unavailable will "feel some kind of way about it."

Network and regional leaders from Eclipse expounded on this topic with unusual gusto, touching on the structural, interpersonal, and cultural gulfs that can impede the creation of coherence. As was true when discussing the network's approach to selecting a science curriculum, Lovell appeared well-attuned to the sentiments likely to be expressed by Eclipse's regional leadership. From their vantage point as network leader, Lovell shared that they maintain a concern that regional leaders who are supposed to be galvanizing resources from the central office will instead reject those supports for spurious reasons:

> I get worried if it's misaligned or if there's a lot of mistrust: *these yokels from the network team don't know how to help me*. Then it's not about expertise at all, it's about relationships and trust-building. Nine times out of ten, if something fails, it's not because of content-knowledge, it's because of relationship failure. People in schools are always

biased toward dehumanizing people on the network team, and people on the network team tend to blame their failures on individuals and personalities at the campus. From the network side, you'll hear, "That curriculum failed because the AP isn't bought in." Then you'll talk to schools and ask why they're not using this intervention that [someone on the network team] created, and you'll hear, "She's not at our school and that doesn't speak to what we do here on this campus."

Potter shared that the regional perception of Eclipse's central office has improved over time but acknowledged that perceptions of the network as detached and disconnected had been prevalent:

I remember thinking those folks in [the central office] are asking us to do these things and they don't have the context.... There was a divide in how people perceived decisions coming down to [us]: *[Regional] Eclipse* and *Eclipse*. It feels like a contextual thing that people talk about all the time.

Potter recalled a specific instance in which Eclipse's satellite region was obligated to execute a centralized policy dictate that felt imposed without adequate consultation:

As an organization, aside from elementary schools, we decided after 2020 that we were going to get rid of uniforms. As an organization, the theory was they're very policing of kids and it feels misaligned with our anti-racist structure. Yet, the majority of leaders in [the satellite region] who are 100% leaders of color disagreed with it. They didn't see uniforms as a way to police kids but as a way to build team and to control other things that might happen in a school. If you have your shirt tucked in, it's harder for students to conceal a weapon, which happened a few weeks ago. It builds a common vision around who we are as a community. I disagreed with us moving in that direction but yielded to it thinking about the organization as a whole. I didn't know our leaders weren't in favor of it since they weren't part of the decision. [Flagship region] leaders were in favor, [satellite region] leaders were not. We still had to enforce it.

Notably, when a campus leader based in Eclipse's satellite region observed Lovell chatting with me in the hallway, she approached to request the restoration of school uniforms. Lovell appeared amenable and suggested that she present evidence of parental support for that policy shift. During our ensuing interview, Lovell predicted that uniforms "will probably come back" in the network's satellite region.

Collins colorfully described the reality of the network's academics team being based in the flagship region as "trash on a stick." More provocatively, Collins shared that regional staff had privately referred to network team members as "colonists—white people telling them what

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to do and then leaving." The raw physical distance between the central office and the satellite region's campuses means that visits are sporadic ("there's guidance around how often they're supposed to come down but no mandate—out of the kindness of their hearts, they're here") and result in guidance being relayed based on "inferences" and "assumptions." Trying to have a standardized experience, Collins observed, is "difficult when the vision lies with people who come in randomly throughout the year." When the network's academic team is present in the satellite region, "it's wonderful. We're on the ground, hip-to-hip coaching, let's move some data." Collins shared that they prepare the regional team for visits from the central office to increase the likelihood that the feedback they receive is "high-leverage":

> You don't want folks to drive down and tell you that your floors are dirty. Because they will. That ruins the relationship. Don't get shitty feedback, because that's going to erode the relationship. It sends the message that they come, nitpick, and leave. And they should give that feedback, but they don't know the kids' names, they don't necessarily come to the kids' graduations. They've made more of an effort this year to pick some events to go to as a senior management team, show their faces during state testing. It's been more of an effort over time, but it's not perfect, and people feel it.

Collins, who at one point referred to our interview as "therapeutic," shared that even attempting to supplement the periodic in-person visits with more routine virtual check-ins has led to perceptions of inequity.

> When I peeped at the Academics Team calendar, I just blew it up. I took screenshots of their calendars. I said, "I'm the largest region, I'm growing, [the flagship region] is shrinking, explain to me why this is what the senior management team's calendars look like." Nobody's in [my region], nobody's Zooming in [my region]. But the Academics team is checking in with *teachers* in [the flagship region]? Fuck that. We've got the lowest data. The community is ripe. What the hell is happening? They couldn't do their fucking jobs if I wasn't building relationships so intentionally.

As explored in this section, the environmental and organizational challenges besetting the leaders of multistate networks are legion. The next section explores how these leaders pursue coherence within their systems notwithstanding the challenges that impede its creation.

Strategies for Creating Organizational Coherence Within the Multistate Construct

Generating institutional coherence within the multistate paradigm requires leaders to negotiate a thicket of prickly challenges. Study participants described adopting a series of strategic measures—some ideological, some structural, and some interpersonal—when attempting to navigate these challenges in order to lead networks characterized by organizational alignment, shared mindsets, and commonality of purpose. Ideological strategies include defining the network's spiritual and operational core, fostering a sense of oneness, and creating common goals. Structural strategies include preserving geographical compactness, iterating responsive governance and staffing models, and designing functional communication and decision-making protocols. Interpersonal strategies include identifying high-capacity regional leaders, nurturing relationships, and delivering high-quality development opportunities. This section explores each of these strategies in turn.

Ideological Strategies

Study participants described making a series of moves that can be categorized as *ideological* in nature. With geographical, regulatory, and cultural chasms often separating their networks' campuses, these leaders take a series of intentional steps to create conceptual bridges, to foster unity, and to combat the development of an "out-group" identity in satellite regions (i.e., one in which stakeholders define themselves, at least in part, in opposition to the network nerve center). The deployment of these ideological strategies is designed to expand the 'in-group' tent by encouraging team members based in different communities to identify themselves as affiliated not just with their individual campus or region but with the network *writ large*. Leaders attempt to strengthen this sense of belonging by defining the network's spiritual and operational core, fostering a sense of oneness, and creating common goals.

Defining the Network's Spiritual and Operational Core

Identifying the core of a network's model allows leaders to create clear expectations around the essential instructional, operational, and cultural design elements that must be present in all regions and on all campuses. Enumerating these "non-negotiables" creates space for administrators based in satellite regions to exercise bounded autonomy; by implication, areas excluded from the definition of a network's "core" can safely be considered ancillary and therefore susceptible to discussions regarding potential regional customization. Engaging in this exercise—circumscribing the areas in which the model is sacrosanct and, by extension, alerting regional leaders to the areas in which they have more latitude to exercise discretion—is one way leaders can attempt to strike a balance between standardization and customization. Or, as Winslow colorfully framed the guidance they might impart to regional leaders, "You have a lot of autonomy, and I know we have a lot to learn from you, but don't fuck with our core model."

On one end of the spectrum, Reservoir Academy defined its core somewhat expansively. Holt shared that the network's vision is for graduates to live "economically independent, happy, opportunity-filled lives," and drew a straight line from the ability of kindergarten students to connect letters with sounds through to middle school students achieving academically and up to high schoolers "reflecting on who they are and developing their talents and voices." Cutler interpreted the network's "bread and butter" as "people development, data-driven practices, and more time." A broad conception of the network's core can conceivably leave less room on the margins for regions and schools to freelance. Holt shared that Reservoir Academy's model is durable across settings without significant modification but added that leaders at all campuses, not just those in the network's satellite region, are empowered to add flavor to the network's traditional mix:

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It doesn't matter the community. The only difference in what we're doing is that we're choosing to locate our schools in neighborhoods that have been historically underserved by the traditional system. That's the main difference in what we're trying to do. Other than that, if we suddenly decided to place schools in different neighborhoods, the program would stay exactly the same....

Having said all that, which sports team you want to have, which community organizations you want to partner with, what kind of culture you want to create, who you hire to work in schools, how they want to work with parents, do they want to have a student council, all those elements that are a large part of the school, that's up to the principal. We have principals who are as serious and academically focused as they come and some who strike a lighter tone.

Cutler essentially concurred, sharing that "90% of how things operate and look are, or are striving to be, in common with schools in other regions." Cutler added that they consider Reservoir Academy to be a "pretty flexible network" notwithstanding "all this effort to codify things and employ the same practices" and said that adaptation is "allowed and encouraged even."

During Perennial's regional board retreat, stakeholders discussed the need to be able to "define succinctly" what distinguishes the organization. Winslow shared that Perennial pursues its mission through personalized learning ("the right content to the right kid at the right time in the right way"), talent development ("everyone is an educator, everyone gets coached, everyone gets a pathway"), and deep partnerships with parents. Personalized learning is delivered through an instructional model that features students rotating through whole- and small-group instruction, online learning, and targeted interventions. Addressing a hypothetical leader of a network satellite region, Winslow said, "These are things we expect. These are the core things that you will do that are core to who we are." From the perspective of a regional administrator, Vaughn described the instructional model as a "can't touch," adding that the satellite region has more "leeway" to innovate in other areas like the development of cultural rituals.

Cadence Collegiate and Playstead Prep, the networks whose leaders described their models as "artisanal" and "distinctive," respectively, perhaps unsurprisingly defined their spiritual and operational cores somewhat narrowly. Channing identified second language instruction and a commitment to racial and economic diversity as the foundational model elements that have characterized Cadence Collegiate since the organization's inception. Rogers explicitly named those two design features as the "core" elements of the network model that cannot be eschewed and expressed a general belief that Cadence Collegiate's satellite region otherwise has "great autonomy." Gilbert, the self-professed "charter true-believer," shared that the network has a single core model element that is "inviolate." Otherwise, Gilbert described a philosophical aversion to issuing top-down edicts they described as redolent of the stultifying district structures charters were designed to obviate:

> I am very much of the mindset that those closest to the issue can make decisions. They know the community. I'm here infrequently. I want to get smart people who are aligned broadly but when it comes to details ... do I need to know whether they have a reading rug that they set up? No. Do I need to get involved in the polo shirts and what they look like? No. Whether they start at 8:10 or 8:20? No. Is it 192 days or 187? No.... Part of the [charter school] Kool-Aid [I've been consuming for 25 years] is that school systems are terrible. They stifle creativity. They're overbearing. In the name of control and conformity they snuff out creativity and ingenuity and idealism. I didn't want to do that.

Patrick confirmed a shared understanding of the relationship between the CMO and the region:

> I don't really think we view them as a central office. That's part of it. Coming from a traditional school, the central office tells you what to do. We don't have that relationship. We have more conversation about the way they want to see things, the way things work here, and then go back to our guiding documents to see whether there's an issue.... It's not a lot of, kind of, 'top-down.' It's working together.

Gilbert shared that their "*laissez-faire*" attitude eventually seeped even into the manner in which campuses executed the model's single, non-negotiable component. When this variability in implementation began to yield inconsistent student learning outcomes, Playstead Prep codified the "essential elements" of its core model element.

Establishing clarity around what is within the purview of regional teams to modify allows network leaders to limit uncertainty and to avoid confusion. While these leaders draw boundaries in different places, they share an interest in reducing the kind of ambiguity that may result in recriminations and coarsened feelings.

Fostering a Sense of Oneness

Study participants described taking a nuanced approach to the cultivation of organizational unity at a macro level that treats the preservation of distinct regional identities as a feature and not as a flaw. With notable regularity, network leaders and regional administrators articulated variations on a similar theme: we are one organization whose singular mission looks and feels slightly different in each region. Rogers eloquently encapsulated this sentiment by sharing that, in Cadence Collegiate's satellite region, the network's "spirit remains while the structures are adjusted for the environment."

A slide embedded within a presentation shared at Perennial's regional board retreat includes a bullet stating that the network "very intentionally maintain[s] a 'one organization' feel." Holt shared that while "One Reservoir Academy" is the network's guiding ethos, "each region has a personality." Similar perspectives were voiced by regional administrators at Cadence Collegiate (Rogers: "I think the challenge and the gift of our mission is that it's complex.... Does the manifestation of the mission look the same [here] as in [the flagship region]? No.") and Eclipse (Potter: "The mission is crystal, but the way it manifests in practice looks different based on the communities and families we serve." Collins: "The model changes based on enrollment, but the beliefs are the same.").

Leaders cultivate this sense of oneness through the curation of shared core values, the development of a common lexicon and iconography, and the development of network-wide

rituals and routines. All Perennial schools share four core values and self-select a fifth that is unique to their community. Eclipse had a disjointed set of core values languishing "on a shelf," Lovell shared, until the network created "unified core values" applicable across campuses and stakeholder groups. Similarly, Rogers shared that Cadence Collegiate's adoption of a shared set of core values (i.e., those expected of everyone in the network including adults and children) "has driven us as a network."

Study participants also use common language and iconography to create a sense of oneness. Winslow shared that Perennial's student creed does not change from campus to campus ("kids say the same thing across the network") and that the network's "branding is consistent." Potter also remarked upon Eclipse's identifiable linguistic and visual identity, noting that the goal is for individuals to "affiliate with Eclipse as the entity rather than a school." Holt attributed the stickiness of a unified Reservoir Academy identity across the network to continuity within its leadership ranks. With 75% of Reservoir Academy's top leaders having been with the network for five years or longer, stakeholders at all levels of the organization are regularly exposed not only to "formal procedures and processes" but to the "informal" knowledge that accumulates in proportion to longevity. Playstead Prep, by contrast, does not prioritize the creation of a unified visual identity. Hallways in the observed campus within the network's satellite region were bereft of the mission-related signage that festooned the walls of campuses in other networks' satellite regions, and Patrick concurred that they "wouldn't even know" a sister school was affiliated with Playstead Prep upon setting foot in its campus.

Across the study sample, participants shared examples of network-wide rituals that confer a sense of communal belonging. These rituals include student chants and cheers, signing days and graduations, leadership summits, and staff outings and celebrations. Cutler explained that

cross-network working groups have developed recommendations and resources to support the creation of rituals that "create a deeper feeling of community" on campuses in each Reservoir Academy region. Lovell shared that Eclipse's rituals are "less *clappy and songy* and more *how do we convene as adults to create a sense of belonging and shared purpose*?"

Intriguingly, several administrators based in satellite regions shared that rituals developed on their campuses had gained purchase in their networks' flagship regions. During the 2020 election cycle, Rogers facilitated student elections for a school mascot (which will be term-limited out of office), a "hilarious" exercise that was soon replicated by campuses in the network's flagship region. Vaughn shared that Perennial's satellite region piloted a biweekly "adult PBIS" ritual in which select staff members are surprised with recognition and prizes. Vaughn shared that this practice "is starting to catch fire" in Perennial's flagship region and is a reflection of a regional embrace of "contributing to the vision of what it looks like to celebrate people." For stakeholders in expansion regions, opportunities to be seen—by both themselves and others across the network—as originators rather than as mere adopters can strengthen the reciprocal ties that bind them to the organization.

Potter elaborated upon the importance of finding ways to harmonize these campus-level, regional, and national identities:

> It starts at the school level. Within the region, it's challenging to get schools to be okay with taking individual school identities and putting them with the regional identity and then at same time getting the regional identity to be aligned with the national identity. You'll continually hear, "In [our region], this is how we do it." Or "It's different in [our region]." The challenge is in changing mindsets around that. Yeah, you want to do what your school wants to do, but it's contrary to our idea of "it's one Eclipse" if you're doing it differently. We want schools to have their own identities but within certain guardrails. You can't say "screw anti-racism" and focus on test scores. That's not who we are. We want you to be passionate about *that* but don't lose sight of *this*. How do I get *this* to fit in with *that*? How do we tell a story about how that fits in with the larger mission?

Leaders of multistate networks create greater coherence by supporting the creation of a unified organizational identity while honoring the distinct characteristics that imbue stakeholders in satellite regions with local pride.

Creating Common Goals

Another strategy that the leaders of multistate networks leverage to create coherence is the formulation of shared goals. By ensuring that all schools irrespective of their location are pursuing the same outcome targets and are evaluated internally according to the same set of indicators, network leaders can attempt to control for differences in regional priorities and channel the bulk of the organization's energies toward a common purpose.

Lovell related that Eclipse's central office and campus-based leadership have historically collaborated on the creation of annual priorities that would effectively "become the things that everyone in the organization—regardless of who you are—would know about and care about." To further this institutional commitment to the co-construction of shared goals, Eclipse has recently undertaken a multi-year strategic planning effort, which Lovell believes will communicate "the foundational beliefs that if you're a part of Eclipse schools regardless of whether you're in [the flagship or satellite region], this is what we care about as a community." The network's annual priorities will now derive from the longer-term goals enshrined in the strategic plan, which Lovell said constitutes "the firmest statement that captures who we are as a network regardless of what region you're in." While regional administrators were not unilaterally responsible for the contents of the strategic plan, Lovell said they will have a clear "mandate" to execute the plan within their region. To monitor progress toward these goals, Eclipse transitioned from a dashboard that Lovell suggested "had a little of everything but not a lot of clarity on what we believe" to one that focuses on four domains—ELA, Math, student re-enrollment, and staff

retention—on the theory that it is preferable to "really pinpoint to principals" what matters most in terms of school quality.

Perennial maintains a series of "always important" goals to which all network schools contribute. Notably, attendees at Perennial's regional board retreat engaged in an exercise in which they assessed the efficacy of their efforts to achieve regional objectives aligned with the network's "always important" goals. In the course of conducting these SWOT (Strengths / [Internal] Weaknesses / Opportunities / [External] Threats) Analyses, members of the regional board broke into working groups and collaborated on posters on which both the network-wide common goals and the region-specific objectives aligned with those goals were presented. Reservoir Academy maintains "broad" organizational goals at the network level according to Holt. To reify what a capacious network-level goal like "dramatically accelerate student learning" looks like at the school level, and to make sure the goals "resonate," Holt explained that goals are developed by central office leadership in consultation with "a larger group of people" that includes regional and campus-based administrators. Cutler concurred that Reservoir Academy attempts to hang its hat on goals "that are inarguable and universal." Apart from goals connected to state assessments that may be less susceptible to network-wide standardization, Cutler shared that the "bigger goals," such as those related to attendance and SAT performance are constructed in such a way that "it doesn't matter what region you're in."

As is frequently the case, Playstead Prep stands as an outlier within this field of exploration. The organization's "North Star" at its outset, Gilbert explained, was the college success of its graduates; accordingly, the most important bar to which it held itself was the extent to which its students were accepted into selective four-year colleges. While that goal has been modified to contemplate both "college and career success," Gilbert said that "on just about any

other dimension, we were flexible in accommodating whatever direction the local school leader and board wanted to go."

CMO executives shared that the creation of common goals allows them to assess the extent to which campuses, including those in satellite regions, are promoting their networks' educational missions. When exploring whether a Playstead Prep campus is meeting network standards, Gilbert said that they consider operational indicators such as "a well-functioning board, a facility that meets the school's needs, fundraising to meet the school's needs, balanced books, and modest surpluses to sustain the school" as well as "student performance as measured by state test scores and on internal assessments." Holt unspooled a list of relevant metrics that bear on whether a Reservoir Academy campus is living up to its potential ("college graduation, persistence, SAT, AP, interim assessments, state exams, teacher retention, leader retention, disciplinary data") but intimated that this determination can ultimately be a bit subjective: "At the end of the day, the school is obviously an academic success or not. You can walk into a school and know immediately whether it's a success." When assessing whether a Perennial school is "successful" and "healthy," Winslow shared that they examine "tons of data" related to attendance, suspensions, achievement, growth, re-enrollment, and staff satisfaction. During a presentation at Perennial's regional board retreat, attendees reviewed slides that compared mid-year performance data on the NWEA-MAP assessment from across the network and which showed the satellite region to have "achieved the highest level of growth for a region." Another slide showed the satellite region to have staff satisfaction data that outpaced the network average.

Notably, however, network leaders were unanimous in their conviction that the purpose of creating organizational goals is not to position schools in their flagship regions as the benchmarks against which all network-affiliated schools are measured but rather to identify areas

for enhanced support and collaboration. Lovell was blunt: "The standard isn't to [our flagship region] but more to the city and the community." Channing expressed a similar sentiment:

> Candidly, we're not in a place in terms of academic performance, student enrollment, teacher retention in our [flagship region] schools where I'd say that's what we want to emulate. We're a good network of schools. We have the potential to become an exceptional network of schools, but we're not there yet. We offer a wonderful experience to most of the students we serve, a supportive environment for staff, but we have a long way to go. It's not like [our satellite region] has to be just like [our flagship region]. Our [flagship region] schools have a long way to go. That means there's the potential to learn from [our satellite region] in areas where they might be on to something better.

Network leaders use the data collected when monitoring progress toward common goals to differentiate the support that campuses receive from their central offices. Winslow shared that equity dictates that Perennial regions receive the precise supports they need "to help them get over the hump," while Gilbert said that Playstead Prep calibrates the intensity of the support its central office provides—including time, attention, and on-site professional development—based on academic performance and the needs articulated by leaders rather than based on a school's geography. Critically, then, network leaders availing themselves of this ideological strategy appear to maximize its impact when they construct goals in collaboration with regions (rather than impose them unilaterally from the central office) and when they ensure the goals are used to drive the provision of support rather than the reinforcement of an internal hierarchy.

Structural Strategies

The second set of coherence-oriented strategies adopted by network leaders can be categorized as *structural* in nature. Leaders deploy structural strategies principally to mitigate the unrest that might percolate in a satellite region that perceives itself to be a neglected appendage, though such strategies also address some of the unique political and cultural challenges inherent in the multistate construct. These moves implicate the design of the networks themselves—

where their constituent regions are located relative to each other, how their schools are governed

and staffed, and the manner in which messages are conveyed and decisions are made.

Preserving Geographical Compactness

Geographic sprawl can be anathema to the creation of organizational coherence. Whereas

far-flung school systems may suffer from stickier perceptions of central office aloofness,

particularly when travel barriers limit face-to-face interactions, more narrowly distributed

multistate networks benefit from an ease of access that permits more frequent touch points.

Moreover, by clustering schools in geographically proximate states with comparable political

orientations, networks can steer clear of the regulatory challenges that may accompany adapting

a model to comport with vastly different policy environments.

Three of the network leaders participating in this study identified geographical

compactness as an essential component of their approach to creating coherence. Gilbert said that

Playstead Prep has prioritized geographic proximity when determining where to grow its

network due to the amount of "face time and hands-on support that's required, particularly at the

start." Holt explained that Reservoir Academy has declined overtures to expand into other states

because the network has "always thought it was important to be geographically compact."

Proximity allows network leaders "to get to any school very quickly, whether it's 5 minutes in a

car or 45 minutes in an airplane."

Channing similarly stressed the importance of central office personnel being able to get

to a satellite region without undue difficulty:

> We have occasionally moved heaven and earth to temporarily place network staff in
> [our satellite region] when it's been shorthanded. We had a rotating schedule of network
> staff members going down there. It's different than a site visit. It's different than routine
> push-in or support for coaching or observation. It's throwing bodies there, which we have
> the capacity to do because it's only a couple hours away.

Because Cadence Collegiate's satellite region is a "quick train ride or quick car ride" from its flagship region nerve center, Channing said, the central office team has been able to maintain a "frequent site presence." Channing added that "the issues of being remote from a place are substantial, though not as substantial as they'd be if we had to fly there or drive six hours." Later in the interview, when contemplating the advice they might offer other current or would-be multistate leaders, Channing said that while there's "no special sauce to this, no secret recipe, I keep coming back to geographic proximity.... You can't do everything by Zoom, text, email. You have to have a physical presence, at least in my view."

Gilbert added that a "regional focus is important" when designing a multistate network's structure for both operational and philosophical reasons. Networks "that are in wildly disparate parts of the country will have their hands full logistically." Like Holt, Gilbert shared that Playstead Prep had also declined overtures from other states, though not exclusively because of the heightened travel burdens: "I don't have a feel for the culture in those places, and it's sufficiently dissimilar from [our region] that we'd be at a disadvantage if we tried." The political dimensions of prioritizing geographical compactness as a strategy for creating organizational coherence will be explored in the section covering multistate leadership during Covid-19.

While Lovell did not explicitly cite geographic proximity as a dispositive factor in the network's structure, they emphasized its importance in allowing teammates in satellite regions to "feel the love." Lovell has established expectations for how frequently central office personnel travel to satellite regions in order to ensure visibility: "I'm very sensitive if someone in [our satellite region] says, 'I haven't seen so-and-so in a long time. I need their help and they're not here.'" For a network leader who feels an obligation to lead by example, this travel schedule can

be demanding. Lovell confided: "I've been overworking by traveling down every other week. It's just not smart or sustainable."

Geographic proximity enhances the ability of network leaders to ensure key central office personnel provide a consistent physical presence in satellite regions. This high-touch service model promotes coherence by exposing network decision-makers to the conditions on the ground in satellite regions and, in turn, heightening the perception among stakeholders in satellite regions that network leaders are attuned to their realities when crafting and promulgating policies and not merely treating them as an afterthought. Furthermore, the ability of network leaders to ensure their central office teams are positioned to provide additional bandwidth at understaffed or otherwise scuffling campuses is of particular importance when incipient satellite regions have yet to reach self-sufficiency and are perhaps struggling to adapt the network's staffing model in a weaker funding environment.

Iterating Responsive Governance and Staffing Models

The governance and staffing structures that the leaders of multistate networks put into place play a significant role in the creation of organizational coherence. Critically, the leaders participating in this study demonstrated a willingness to re-examine their assumptions and to modify these structures when they determined that doing so would better serve their networks' objectives. Accordingly, it is not only the development of these structures but also their ensuing assessment and refinement that allow multistate network leaders to achieve greater coherence. This section will first explore governance models before proceeding to staffing.

Governance. Within the multistate CMO paradigm, two governance models generally predominate. In one, a national board serves as the charter-holding entity for schools in all regions. This model, in crude terms, tends to privilege efficiency and clarity over local control.

In the alternative model, the CMO functionally serves as a vendor that enters into an arms-length management services agreement with the board of an incorporated, charter-holding entity in the satellite region. This model, conversely, tends to provide for greater community representation but imposes administrative burdens and can create murkiness around reporting structures and lines of accountability.

The leaders of the networks that operate as vendors were sanguine about these trade-offs. Irrespective of whether state statute mandates the incorporation of an independent entity with an autonomous board, these leaders believe the legitimacy conferred through the establishment of a local governing body justifies the marginal increase in organizational complexity. Gilbert framed strong local governance as a key to Playstead Prep's ability to operate effectively as a multistate network:

> The idea for Playstead Prep always was that it was going to be authentically connected to the community. The board would not be a rubber-stamp board but a real board organically connected to the people living in the community. That meant it would give you access to support and capacity to govern. That's critical in thinking about a network spread over [multiple] states.

Gilbert acknowledged that working with multiple boards "makes things a bit more difficult" in the short-term but concluded that for "long-term sustainability, having a school that the community feels is 'our school' is the key to having it last." Gilbert described a "well-functioning board" as evidence that the network's model has been successfully transplanted to a new setting and said that "empowering the [regional] board" is one way to "respect and honor" those individuals' superior community connections "in the way we approach the work."

Channing tartly observed that it is a question of "rogue boards at one end vs. captive or figurehead boards on the other" and mused that "one person's rogue board is another person's fully autonomous board." Channing noted that the "the problem with fully autonomous boards in the CMO context is you can't run your model," suggesting that the board of a network-affiliated

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school in a satellite region necessarily cedes some measure of decision-making authority over key design elements to the CMO. Channing noted that Cadence Collegiate verified under state law that the CMO's leader would be eligible to sit on the school board in the satellite region and went on to add that the regional board is composed "of people who were carefully screened to make sure they understood the nature of the relationship with school leadership and the CMO." Channing said that there's "always a risk" that a board—even a charter board that is self-perpetuating and whose initial composition was largely controlled by the CMO itself—will become one of those dreaded "rogue" governing bodies but added that, for Cadence Collegiate, that risk has not been enhanced by the fact that the board is based in another state. While admitting to having scars from a previous role in which a national organization would "airlift people in to meet with" boards in other states, Channing attributed the healthy relationships at Cadence Collegiate to the CMO's "proximity" to the board and school in the network's satellite region: "We have very positive working relationships and personal relationships that we've built with those board members. We all like each other. That helps."

Because these CMOs are contracting with independent fiduciary boards, maintaining those strong relationships is of existential importance; a canceled management contract can deprive a CMO of the revenues it needs to staff its operations. As noted, Channing sits on the board of the school in Cadence Collegiate's satellite region. While Gilbert is not on Playstead Prep's regional board, the management agreement between the CMO and the school stipulates that four senior network executives (including Gilbert) "will attend" monthly board meetings "in order to robustly support the governance of the School." Additionally, Gilbert noted that the chair of the regional board had somewhat recently been appointed to the national board, creating

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"more cohesion" between the national and regional operations and bringing a regional voice to the table for "decisions being made at the highest levels."

Channing and Gilbert were both observed attending virtual meetings of their regional boards. With the medium both perhaps facilitating their participation (by eliminating travel barriers) and limiting their ability to cultivate meaningful connections, the network leaders managed to convey an easy familiarity, remaining deferential while weighing in authoritatively (Channing on fundraising strategies, Gilbert on charter renewal considerations) at appropriate intervals. Both networks' regional administrators were in attendance at those meetings as well, highlighting one of the additional complexities this governance model can create. The Playstead Prep management agreement provides that the regional leader is "an employee of the school" whose retention will be at the discretion of the board but who will report both to the board *and* the CMO. (Patrick shared that the chair of the regional board made "very clear" from their moment of hire that Patrick works for the board.) Channing similarly shared that Rogers reports "both to me and to the board of the school."

While ambiguity in this critical reporting relationship has the potential to impair organizational coherence if it places the CMO and the regional board at odds, it similarly has the potential to foster greater coherence if it ensures those entities are communicating effectively and maintaining alignment around expectations for regional administrators. In either event, for the networks whose governance structures entail multiple autonomous boards entering into contractual management relationships, coherence is the residue not of administrative simplicity but of a more even distribution of institutional authority.

For the networks whose national boards are responsible for governing the schools in their satellite regions, calibrating the appropriate balance between administrative efficiency and

community rootedness is a dynamic process. Both Lovell and Winslow described their evolving

views on regional governance, with Eclipse and Perennial both taking strides toward devolving

more autonomy to local stakeholders. Lovell spoke from the standpoint of a leader wary of

acting rashly lest a move conceived of as remedial actually prove problematic. Recalling recent

deliberations about the relationship between the network's flagship and satellite regions, Lovell

said,

> The board was rightly thinking about, "What are we? Are we twin sisters? Kissing
> cousins? Exes?" I think I have a point of view on this, but more so I truly believe that it's
> premature for us to answer that question right now. Most board members care about
> what's happening in their own community. If we answer now, we might be leaving
> opportunities on the table. If we split and become ex-lovers, there's a lot of things that
> could be true that won't be true because we're a single-region organization.... I think
> there's a lot of potential options, but the board is preoccupied thinking about "Why am I
> in a board meeting talking about [our satellite region]? I live in [our flagship region]."

Lovell shared that the national board ultimately elected to create a local advisory board that

would not possess fiduciary governing power but would have significant influence over decision-

making vis-à-vis the network's satellite region.

More definitively, Perennial decided to shift away from the single-entity model in its

satellite region. Having initially advocated for a policy change that would permit its national

board to govern schools in its satellite region, the network was, during the study period, in the

midst of undertaking a pivot by converting its regional advisory board into a fiduciary oversight

body. Winslow noted that the network's initial posture when pressing for a policy change was

that it "was more efficient to not have a local board. And that is correct: it's far more efficient."

This philosophical orientation was reiterated in the slides shared at the regional board retreat at

which this impending shift was discussed at length. At the time of the network's initial growth

beyond its flagship region, Perennial "believed that a highly centralized org structure and

standardization would help us achieve more consistent quality across schools and reach scale

more efficiently." The impetus for the change, according to the presentation, was a growing appreciation for "the need for greater regional capacity and ownership." The establishment of a local board "is essential, especially in creating local presence and momentum." The fiduciary governance structure, it was argued, would facilitate the recruitment of "strong and engaged board members" and more firmly establish the network's local *bona fides*.

In a conversation at the regional board retreat, Winslow advised that creating an autonomous local board would be "really powerful" from the standpoint of "brand awareness, fundraising, and advocacy." Winslow noted that fund development efforts for the region would occasionally "hit a wall" when prospective donors would balk at the prospect of writing a check to an organization incorporated and headquartered in the flagship region and governed by trustees without a clear nexus to the satellite region. Nevertheless, while Winslow was clear that the shift would "make a big difference for what we're trying to accomplish as a network," questions about the ultimate allocation of authority between the national and regional appendages had yet to be fully resolved. When inquiring about how a hypothetical disagreement between the entities might play out, a regional board member suggested that reliance on the national network might limit the extent to which the region could exercise independence: "So we're going to college, but Mom and Dad are still paying for stuff." Contesting the premise while extending the metaphor, Winslow countered: "It's more like, if you don't come home for Thanksgiving, we talk about it."

Staffing. The leaders of multistate networks also use their personnel structures to create greater organizational coherence, fine-tuning the design of their national, regional, and campus staffing models in the pursuit of operational efficiency and implementation efficacy. As discussed in a previous section, multistate networks occasionally adjust their staffing models to

account for the disparate regulatory environments or funding models in their satellite regions. But whereas those shifts can be attributed to external conditions, other shifts to multistate networks' staffing structures are a byproduct of their leaders' efforts to ensure successful growth.

Seeding new schools with talent familiar with the CMO's model is a common tactic adopted by the leaders of growing networks (Feit et al., 2020; Lake et al., 2010). Lovell—who as a successor leader was not part of Eclipse's decision-making structure when the network expanded into its satellite region—relayed that their understanding of the network's thought process when it first expanded was "What talented people could [we] convince to come and move to [the satellite region]?" There is some evidence that this tactic is more difficult to utilize when shifting to a new school within the same organization requires uprooting one's life: Lovell shared that not many talented teachers "came and stayed," while Channing said that Cadence Collegiate has rarely relied on movement among network schools. Playstead Prep and Reservoir Academy offer some evidence to the contrary. Gilbert shared that Playstead Prep administrators have moved between regions "all the time," and Holt suggested that geographic diversity allows Reservoir Academy to retain talent that might otherwise leave the network to pursue new professional challenges: "It allows for even more movement within Reservoir Academy. You can move not just between the school and the home office or between the classroom and leadership but can choose to seek another opportunity [in a new region]." Cutler, for example, had worked in campus-based and regional roles in Reservoir Academy's flagship region before assuming an administrative role in its satellite region.

Notably, several study participants reported making fundamental changes to their network staffing structures in an effort to shift—however incrementally—the locus of authority away from a remote nerve center and toward their satellite regions. Cadence Collegiate, for

example, created the role of executive director (ED) when it opened a school in a satellite region and vested it with significant administrative autonomy. Two other networks—Eclipse and Perennial—were in the process of preparing to create similar roles in their satellite regions during the study period. Paralleling the manner in which their governance structures were evolving, these networks were using their staffing structures as a vehicle to empower stakeholders based in their satellite regions.

Lovell and Winslow positioned these shifts in their networks' staffing models as responsive to the manner in which their organizations have evolved. Lovell shared that Eclipse is "now at a scale where having a regional ED makes a lot of sense." The creation of the regional ED role was preceded by a build-out of a regional infrastructure. Whereas the network's central office staffing model previously featured one network person responsible for providing support services within a given domain to all regions, Eclipse now has regional specialists in a range of areas including marketing, recruitment, and enrollment. Lovell shared that when they joined Eclipse, "there were maybe 20-ish folks in the CMO office, and only two who resided in [our satellite region]. Now there are 30 people in the CMO office, about 10 reside in [our satellite region], and there's a regional focus."

Collins said that the shifting composition of the central office leadership team has helped address some of the challenges they have experienced as an administrator in a satellite region. Collins said that "the network" had previously been uttered as pejorative. "But now I'm 'the network.' I get the regional CMO team together and let them know that when people say 'the network,' they're thinking 'you.'" While campus-based team members in the satellite region still largely perceive the central office to be detached from their realities, Collins said there has been progress:

Honestly, what I'm learning is that it goes beyond titles. It's really about visibility and the people in charge of relationship-building when you're doing that bi-regional work. You have to have somebody sold on the mission of the network but also deeply committed to the issues in the region. One crucial thing is making sure those people are a part of the senior management team. Design-wise, I think we got that right.

Potter explained that "breaking down central roles into more regional roles" and having Collins on the CMO senior management team has created greater network-wide coherence by increasing regional receptiveness to national priorities:

If a similar decision came straight down from Lovell, if it doesn't go through the [regional] conduit, it might land wrong with schools, and they might be averse to implementing. Having a larger [regional] team has allowed the central team to be more effective.... Now you can get school leaders to move if you can get Collins on the same page. [Collins] has managerial authority and the context of the region.

Both due to the specialized knowledge needed to operate its schools and to the communication benefits that accrue from empowering local decision-makers, Potter speculated that Eclipse would need to continue devolving more formal authority to the satellite region as it grows.

Like Eclipse, Perennial has also regionalized some of the shared services that had previously been provided by central office personnel situated in the flagship region. According to a slide deck shared at the network's regional board retreat, regional teams "improve consistency, quality, and efficiency," and "are more able to serve the specific needs of their community, assess issues in the region, and support our schools on a consistent, ongoing basis." Shifting support services to the regional level, in turn, frees up the national office "to focus less on executional support and more on building strategies and systems designed to scale and further elevate impact and quality." The move toward regionalization, which emphasized "local decision-making," included the establishment of "an Executive Director regional model, with this 'single leader' for each region sitting on our Network Executive Team."

To Winslow, the shift toward greater regional ownership was a function primarily of timing. Winslow elaborated:

Centralization vs. regionalization is an interesting concept. I don't think it's as simple as 'be regionalized.' Understanding when, what do you centralize, what do you regionalize, is a fascinating conversation. We're really tight on our model. We've consistently been tight. A lot of networks are trying to tighten, but we've always been there. We're tight on the model, and that's been such a win in terms of scale....

I don't want to say that the centralized structure was wrong. Having a centralized structure is key to having continuity across the network on certain things. At scale, I think you do need to think about a regionalized structure. I'm glad we've shifted to that structure. If I had to do it all over again, I'm not sure I would have started with the regionalized structure. Moving forward we would, but we're at a different size and scale now.

Vaughn shared that going "to the more regional ownership model has been beneficial" and that Perennial's regional team has begun to develop an identity of its own independent of both the national office and the schools it supports. While shifting toward a more regionalized structure can ostensibly create mechanisms for greater responsiveness to local conditions, however, the mere act of pushing decision-making responsibility closer to schools cannot prevent networks from falling into familiar traps. Vaughn, who had previously shared that team members in Perennial's satellite region "get a little ornery" when "someone from national says, 'This is what we're doing,'" admitted to having made a misstep upon first transitioning to the regional team by creating an annual planning calendar without soliciting input from campus leaders. Articulating a principle that resonates powerfully with charter proponents, Vaughn said that "if you micromanage and are too top-down, that takes away one's ability to be creative." For network leaders seeking to foster greater coherence, that axiom perhaps points to the limitations of over-reliance on strategies hinging on changes to an organization's governance or staffing structure.

Designing Functional Communication and Decision-Making Protocols

The leaders of multistate networks rely on communication protocols and inclusive decision-making processes to bridge geographical and cultural divides. Leaders at both the network and regional levels described efforts to create robust yet streamlined two-way

communication channels as essential when attempting to remain informed and aligned as an organization. Gilbert described this imperative as the need to "establish reasonable norms for communication between both parties." Thoughtful communication efforts feed into decision-making processes that value the perspectives of stakeholders based in satellite regions. These operational structures, when designed and implemented effectively, reduce the disconnects, perceived slights, and feelings of being unseen that can cause friction and impede the creation of coherence.

Unlike Eclipse and Perennial, Reservoir Academy has undertaken a concerted effort to become progressively *more* centralized in recent years. Holt said that the "main impetus of the shift" away from a decentralized organizational structure was variability in student outcomes across schools. Holt shared that gap between the network's "highest-performing schools and our lowest-performing had grown to be too great, especially after the implementation of the rightfully more rigorous Common Core standards," and explained that network leadership had concluded that the gap could be closed by "aligning on our best and most important instructional and eventually operational practices." The move toward centralization has heightened the importance of effective communication, both from the standpoint of ensuring that regions are equipped to execute on a common vision and that the network is honoring the agency of stakeholders who had previously had freer rein. Moving "actively" toward centralization has allowed Reservoir Academy to develop systems with intentionality, though Holt shared that the network's scale has complicated the development of clear communication systems:

> The larger you become as an organization, the more things are happening at any one moment that you can't control. We're a far-flung organization. It used to be everyone read their emails. Now who knows the best way to communicate with everybody? Communication is a problem in today's world. A principal [in one region] can call up a principal [in another] for advice, but nothing beats being able to call and say, "I'll be there in 15 minutes."

Cutler detailed the manner in which centrally created curricular materials and cultural systems are disseminated to campuses through shared servers, summer professional development, and regular Zoom meetings. Cutler relays "unique local challenges" during check-ins with their principal point of contact in the central office and in turn receives support based on exemplars and trends from elsewhere in the network. Cutler also explained that Reservoir Academy addresses areas of need (e.g., strengthening the transition between middle and high school) by empaneling working groups to spend a full year developing a new practice before it gets codified and pushed out to schools. Ensuring regional representation on these working groups, Cutler said, is "important for storytelling purposes":

> The ultimate success sometimes at the end of that year is these all end in summer staff training where someone stands up and says, "We spent a year building this thing," and you see the name of everyone who participated. If you're from [that region], you'll feel like one of ours was there.

That overt commitment to soliciting input from a broad range of stakeholders prior to a practice being formalized or a plan being finalized has suffused the network. Cutler said that Reservoir Academy has "gotten pretty good at letting people see a proposal, making sure folks feel like they have an opportunity to weigh in."

Effective communication is of equal importance to networks attempting a pivot toward greater regionalization. Vaughn stressed the importance of continuing to collaborate with other regions, warning of a threat in becoming "so siloed and regionalized that you're not sharing best practices, aligning on the big stuff that makes us Perennial, and then translating that back into the regions." Within this framework, the onus shifts to regions to "take the model, adapt it, and then share out what's working." Winslow acknowledged that the structural pivot would also pose challenges for central office personnel accustomed to having their directives followed. Now, at the CMO level, people are "coaching, influencing, working through the ED. You were directly

executing, now that's shifting in terms of communication and decision rights." To prevent schools from being "bombarded" with "one-off requests" from the central office, the CMO developed a task-tracking hub that requires network teams to coordinate internally rather than reach out on a *seriatim* basis.

With Cadence Collegiate similarly intent on avoiding "siloing," Channing has prioritized cross-functional and cross-regional communication even while conceding that "it runs the risk of death by meeting at times." Unlike schools in the network's flagship region, the leadership team in Cadence Collegiate's satellite region has a standing weekly check-in with the central office leadership team. Channing shared that allocation of decision-making responsibilities is "arguably the most important question around how you set these things up for any network." Utilizing an "IRDP" framework in which parties are designated as responsible for offering input, providing recommendations, making decisions, and performing tasks, Channing shared that leaders in the network's satellite region tend to have more decision-making authority on account of their familiarity with the factors that necessitate model adaptations. Nevertheless, Channing expressed a wariness about countenancing decisions that could make it more difficult for the central office to provide the expertise that has helped make the model effective elsewhere:

> If [our satellite region] with different state standards, for example, needed to use a different science program, we would give them autonomy on that but we'd want to have input. They might be the decision-maker but we'd want to have substantial input.... The question in making that determination that I always think about is whether it risks taking the school in a direction that makes it harder for us to support. Choice of curriculum is a great example. If our program team is trained in supporting a particular curriculum model in reading, say, and now a school uses something else, we're going to struggle to support them, so giving a school autonomy there is something that should be done very carefully.

Cadence Collegiate's transparent and inclusive approach has helped the network avoid "conflict" in ambiguous cases "where the question of who has authority to make a decision isn't a settled

matter." Channing explained that a query, a quick huddle, and an open dialogue typically suffice to allocate decision-making rights expeditiously.

Lovell struck a similar chord, noting that each conversation about where to standardize and where to differentiate is different and requires "unpacking" the relative merits of vesting decision-making authority with the central office or regional stakeholders. In the course of a lengthy and esoteric rumination notable for its ambivalence about both the possibility and the ultimate value of creating standardized systems across multiple regions, Lovell posited that any centralized command structure is likely to engender pushback:

> It's human nature for there to be exceptionalism. Cohesion—I don't think is a very sexy thing. No one's like, "Yay, standardization!" Customization? "I'm a unicorn!" You should speak to that language. That's sexy. It resonates with people to say, "You're special and thus I have to treat you specially."

When weighing whether to defer to local decision-makers or to pursue network-wide consistency, Lovell balances short- and long-term considerations:

> There's a bias against standardization. The tension that I feel the most is not, "Is standardization good or bad here?" The question is whether it leads to better outcomes. I think it probably does most of the time. But sometimes I think standardization will actually lead to worse outcomes *now* even if I think we'll get better faster if we standardize because it will force us to come together around a shared vision on something. In the immediate term, you might get worse results from standardizing rather than freeing people up to do what they think is best.

Nevertheless, as Eclipse pivots toward greater regionalization, decisions will necessarily incorporate more significant local input. Drawing on the examples of whether to sanction Eclipse's satellite region deciding to adopt its own science curriculum or restore a student uniform mandate, Lovell shared that the network's decision-making structures are evolving in real time with stakeholder voice assimilated into pre-established frameworks:

> How do we walk in partnership with our parents and adapt [our model] to success in the [satellite region's] environment? Who gets to make that determination? Historically, it has been the centralized academic team making decisions for both regions. Now it's

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on-the-ground feedback from parents and scholars overlayed with our historical focus on rigor.

As is the case with the design of a multistate CMO's governance and staffing structures, a dynamic approach to the development of communication and decision-making protocols appears to support network leaders in their pursuit of organizational coherence. This fluidity allows leaders to modify their processes in response to evolving internal circumstances and environmental conditions, preventing static systems from becoming a source of friction.

Interpersonal Strategies

The third set of coherence-building strategies used by the leaders of multistate networks is *interpersonal* in nature. These strategies reflect a recognition that the efficacy of ideological and structural efforts to create coherence has very human limitations. Ideological strategies can run aground when stakeholders in satellite regions decline to internalize the organizational ethos being espoused; systems and structures are only as sturdy as the individuals tasked with executing them. Interpersonal strategies include identifying high-capacity regional leaders, nurturing relationships, and delivering high-quality development opportunities. By investing in the individuals charged with leading and staffing their satellite regions, network leaders cultivate the goodwill and mutual affection that allow their organizations to thrive.

Identifying High-Capacity Regional Leaders

Among the constellation of factors that determine the success of an interstate expansion effort, few loom larger than the selection of a satellite region's lead administrator. As the network's external face and internal proxy, the lead regional administrator is uniquely situated to indulge a quiet animus that undermines the network's standing, to struggle in good faith while attempting to translate the network's model in a new setting, or to orchestrate a successful on-the-ground operation that infuses a national organization with an authentic local flavor. When

seeking the right person to be their lead regional administrator, network leaders typically prize two types of candidates: those who are "of the network" (i.e., a known commodity being transplanted into an unfamiliar setting) or "of the community" (i.e., someone with ties to the satellite region but without extensive familiarity with the network's model). As candidates with both credibility in the upper echelons of a CMO's hierarchy and an authentic connection to the satellite region are rare breeds, study participants offered a range of views on which attributes in regional administrators they believe best lend to organizational coherence.

Two of the regional administrators participating in this study had accumulated significant work experience within their respective networks prior to relocating to a community with which they had no prior ties. For Reservoir Academy and Perennial, organizational coherence stems from the manner in which Cutler and Vaughn are able to draw on their intimate familiarity with the networks' models to facilitate transmission across state lines. Neither Holt nor Cutler identified community ties as an important consideration when vetting leaders for Reservoir Academy's regions. Cutler, who had worked in campus-based and regional roles in Reservoir Academy's flagship region, explained that the network places a premium on providing opportunities for advancement to educators who have proven capable of executing its model at a high level. These career ladders not only ensure consistency across campuses and regions but serve an important retention function: "There's a strong internal pipeline, and that's something we leverage a lot to keep our strongest people. There's a lot we do strategically to invest in our strongest people over the long term. The leadership pathway is one of them."

Perennial similarly prioritizes having regional administrators steeped in the network's model. Winslow confessed that the network had made a "real mistake" in its satellite region by failing to develop a bench and subsequently appointing an administrator with no prior network

experience. Vaughn, accordingly, was "shipped out" from the flagship region to get things on track. While Winslow noted that regional leaders would "ideally" also have local roots, Vaughn concurred that the network considers "experience with the model" and "strength of leadership" to be paramount. During a presentation at the network's regional board retreat, a philanthropic supporter shared that Vaughn's assumption of a greater role and the attendant increase in that funder's confidence in the regional leadership team had contributed meaningfully to their enthusiasm for the network's continued growth in the satellite region. Notably, Winslow shared that Perennial intended to deviate from this approach in a new expansion region. There, the founding lead administrator will have extensive community ties but will have never "worked full-time in our schools or been immersed in our model" prior to the region launching, a reality labeled by Winslow as a "Covid casualty."

Playstead Prep and Cadence Collegiate, the "distinctive" and "artisanal" networks that have generally defined their cores narrowly and which operate with independent fiduciary boards in their satellite regions, employed regional administrators who are decidedly "of the community." Channing said the CMO's lack of expertise regarding the operating conditions in the satellite region ("What do charters look and feel like in [the community]? What are the relevant community organizations? How is SPED handled?") made it imperative to have local administrators in possession of that knowledge. Channing recruited Rogers, who had previously worked in a fundraising capacity for a charter school in the satellite region and who was supporting Cadence Collegiate's exploration of an expansion into the community, to become the founding executive director. As the network's lead representative on the ground, the political savvy Rogers exhibited and the community support they were able to build on the network's behalf compensated for their admitted lack of prior experience within school systems:

Did I bring deep educational expertise? Absolutely not. Was I a seasoned organizational leader? No, I was very green in that regard. But I knew the authorizing environment well. I was deeply immersed in education. My background in [the community] was in fundraising and political organizing. So when we recruited a founding coalition, we were really deliberate about who we needed to bring in. We were navigating really sticky challenges with neighborhood organizations, councilmembers. Making sure I had the right support from right state reps and state senators and neutralized those who might be in opposition. I think I was able to tap that personal network I had and then build a founding coalition that could get us through the process. You have to have someone on the ground doing that and then paying attention to it year after year.

Rogers said that Cadence Collegiate relies on Channing's support when a situation involving key external actors in the satellite region requires bringing in "the big guns," but that Rogers otherwise bears responsibility for developing and executing a stakeholder management strategy.

Gilbert provided a succinct explanation for how the Playstead Prep national and regional teams have historically been structured from a talent standpoint: central office leaders have possessed the "skill sets that it didn't make sense to carry as overhead for one school" (e.g., authorizing, facilities, finance, and fundraising), while regional teams had "a leader and board who understood the community." Like Rogers, Patrick did not participate in a formal internal training program analogous to the one described by Cutler as a key feature of Reservoir Academy's approach to leadership development. (Patrick: "Not even close.") Until stepping into a leadership role at Playstead Prep, the full breadth of Patrick's educational experience had been within traditional public schools and districts. Patrick had done turnaround work "forever" but was admittedly unfamiliar with charters and was taken aback by the autonomy they were expected to exercise in the role:

The thing that caught me off-guard was how many things central offices provide for schools. When I walked into this situation, I was unaware that there wasn't an ops manual that was really concretized. When you take over a school in a solidified, traditional district, there are certain things that are non-negotiables. Contract negotiation? No, there's a pay scale. I wouldn't have asked those questions anyway because in my 20 years' experience, those things were really laid out.

Unlike with Cadence Collegiate, where Rogers as regional administrator is the point person for external stakeholders, Patrick shared that Gilbert as network CEO is principally responsible for managing Playstead Prep's relationships with the political and fundraising classes in its satellite region.

Consistent with its evolving approach to governance and decision-making, Eclipse has gradually shifted toward the prioritization of regional administrators' local ties. Potter explained that "the movement we've made within the organization is prioritizing folks on the ground who know the community." Whereas networks like Perennial and Reservoir Academy create internal talent pipelines that allow them to incubate leaders in one setting before offering them leadership roles in another, Eclipse's talent pipeline relies on educators with local roots to progress through the organization's leadership stratum while working within the satellite region itself. That is, rather than developing an understanding of the network's model as instantiated in one region before attempting to replicate it elsewhere, these homegrown leaders both internalize and shape the development of the regional variant while rising through the organization's ranks. Lovell shared that the principals in the network's satellite region were all originally from the community and had worked in network schools as teachers and administrators. Potter went to college in the community before starting at Eclipse; Potter completed a two-month residency in the flagship region before assuming an expanded role. Collins, who has deep community ties, remarked that leaders in Eclipse's satellite region are "like celebrities." Collins explained:

> People revere us. There's an honoring [here], especially of Black leaders who have risen through the ranks. If you start as a teacher or a dean, then you move to instructional leadership, that's traditionally been a big leap at Eclipse. You're honored in that way here. [This state] is down-home. Most of the people are from here. There's not a lot of transplants. You're from here, born and raised. There's a lot of spirit. It feels like football games at times.

The emergence of a capable cohort of administrators with meaningful ties both to the community and to the organization appears to have enabled network leadership to recalibrate the manner in which the central office and the regional team collaborate to ensure Eclipse's schools are operating effectively.

Thus, whether by dispatching trusted team members to export their models to new communities or by tapping local leaders whose strengths complement existing central office capacity, CMO leaders build the functionality of their multistate networks by selecting regional administrators who bring credibility and operational know-how to their organizations.

Nurturing Relationships

A recurring theme that arose in interviews with both regional administrators and network leaders is the centrality of strong cross-regional relationships to the basic functionality of multistate systems. In general, a consensus emerged that the burden falls primarily on central office personnel to build relationships that will allow regional stakeholders to refrain from ascribing ill-intent, inconsiderateness, or incompetence when communications or decisions are poorly received.

Regional administrators stress that these relationships require consistent cultivation. Collins, for example, admonishes Eclipse's central office team:

> Don't assume that just because something didn't work in [the flagship] region that it's not working here. Don't assume the same feedback structure is going to work. Don't assume the same level of compliance is going to be here. We don't see you! You've gotta build relationships especially because you're not present every day.

Collins explained that autonomy flows in direct proportion to trust that central office leaders have in a regional administrator's decision-making: "It comes down to relationships. . . . If you have strong relationships, you can get some things moved." Patrick cited "relationships built over time," including a "very serious mutual respect" with a central office counterpart at

Playstead Prep, as a factor allowing all parties to operate on the assumption that they are "fighting for what's best for children" even if "going about it different ways." And Rogers said that while Cadence Collegiate has worked to build systems and structures to support interstate operation, "person-to-person" relationships are the organization's backbone. Rogers referred to the central office team as "deeply good people" and praised network leaders for providing opportunities for campus leaders to develop "peer relationships" that promote collaboration and foster a sense of shared purpose.

Network leaders alternately appreciate and bemoan the importance of relationship building. Winslow acknowledged that "trust is built by doing hard work together and really delivering." Nevertheless, as Perennial has grown, "the complexity of relationship management" has posed challenges, with Winslow explaining that devoting time to an ever-increasing number of one-on-one relationships is "not very scalable." Lovell, who interacted loosely and familiarly with Eclipse's front-line regional staff throughout the observation window, identified another downside to the pervasive dependence on relationships: an insularity that precludes outside hires from quickly habituating to network norms and being positioned to deliver professionally.

> We've had a really hard time bringing on external senior leaders and having them be successful. It requires so much credibility and relationship-building to get shit done. It requires years of working inside of an organization to navigate that. It's really hard for a new person to know how to do that. I think that's our fault, not theirs. That's a problem we'll need to solve. We're not going to solve it today. There's a lot of entrenched bias.

With Eclipse embracing greater regionalization and focused on promoting from within in its satellite region, Lovell said the network's charge was to "make our internal pathways really strong first" before attempting to determine "how to expand the pool by bringing on external folks."

For the leaders of these uniquely constructed networks, the process of creating coherence via relationship-building demands both a substantial upfront investment and unswerving follow-

through. Within the multistate paradigm, where local stakeholders with a steadier finger on the pulse of a community's needs and values frequently find cause to rationalize questioning, slow-walking, or outright defying a central office's decisions, CMO leaders are well-served to devote the resources necessary to nurturing these relationships. As Channing explained:

> You have to build relationships early and in an ongoing way so that your school doesn't go off the rails, off-mission, or rogue, or become politicized in a way that you might be more alert to in your core jurisdictions or home base.

While building a sincere and casual rapport with board members, administrators, and front-line educators requires significant expenditures of time and energy, the rewards in terms of organizational functionality are substantial.

Delivering High-Quality Development Opportunities

For leaders seeking organizational coherence, providing high-quality development opportunities accomplishes multiple objectives. By building the human capacity of educators in satellite regions, central office leaders equip schools to deliver educational programming both more responsive to student need and better aligned to the network's model. By facilitating opportunities for professional collaboration, leaders accelerate the development of productive relationships between professional counterparts performing similar roles in similar settings. And by bringing together stakeholders from multiple regions for training purposes, leaders promote a sense of organizational unity that precipitates the perceptions of 'oneness' that transcend geographical and cultural divides.

Study participants differed in the extent to which they rely on their central offices not only to create PD materials but to deliver the trainings themselves. Leaders from both Eclipse and Reservoir Academy described these trainings as being centrally created but regionally delivered. Potter said that Eclipse's summer PD sessions, which provide an opportunity for educators to align on the network's "higher ideals that should be consistently true across

regions," are "network-driven" but "pushed out by regional leaders." Holt shared that Reservoir Academy's regions similarly convene prior to the start of each school year for trainings that are created by the network's central office team. Both Perennial and Reservoir Academy host annual in-person retreats. Perennial, Winslow said, brings leaders from across the network together semiannually, both during the summer and again each February. Holt explained that Reservoir Academy's leadership retreat is "a little PD but really it's about community bonding." Cutler noted that in addition to the "big annual retreat," during which Holt provides an update on "where we're at and where we're going," Reservoir Academy has cross-regional retreats where educators in comparable positions across the network come together: "I'm essentially forced to sit next to my counterparts across regions many times a year. A certain amount of time together makes that alignment work."

Playstead Prep, with its single core model element shared across network campuses, provides less centrally designed or delivered professional development. Patrick noted that while some central office personnel occasionally come to the region to deliver trainings, recent iterations of the management agreement between the CMO and the regional board have progressively shifted PD responsibilities into the region's bucket. Gilbert shared that Playstead Prep at one point did bring stakeholders from across the network's regions together over the summer—first to focus exclusively on that shared model element and then later more broadly to include teachers and administrators discussing "things that might be common where facilitating a sort of shared learning between school leaders in [our regions] would be useful"—but did not appear to consider this effort germane to the network's approach to delivering PD moving forward.

In this section, I presented key findings related to the manner in which multistate network leaders attempt to create coherence notwithstanding the numerous challenges they face. Leaders deploy ideological, structural, and interpersonal strategies to bridge the relational, cultural, and regulatory divides that materialize within geographically non-contiguous school systems. In the next section, I highlight the key attributes of successful multistate charter leaders.

Attributes of Successful Multistate Leaders

The previous section was concerned with the *how* (i.e., the measures that can be adopted to combat the challenges inherent in multistate system leadership). This section addresses the *who* (i.e., the observable attributes of the individuals who demonstrate some degree of success when attempting to run this playbook). The leaders who prove capable of excelling in this role do not share identical pedigrees; they are founders and successors, homegrown and externally sourced, former teachers and career changers. However, though their backgrounds vary and their personalities and leadership styles remain suitably distinctive, the characteristics they exhibit when helming their respective organizations have much in common. A composite sketch of the successful multistate charter leader can be produced by triangulating the data collected for this study. While they do so in ways both befitting their personal styles and in service to their networks' needs, these leaders subordinate their egos for the betterment of their organizations, exercise finesse and discretion when wielding authority, and relentlessly pursue improvements in the way their networks operate. This section describes how the participants in this study embody these traits.

Subordinating One's Ego for the Betterment of the Organization

Humility is not always a virtue associated with charter school leadership in the public imagination. However pure their aims, however dire the *status quo*, however appealing the

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alternatives their schools provide, earnest professions of a desire to rescue otherwise trapped students and families from a substandard system can strike the neutral bystander as self-aggrandizing. Perhaps paradoxically, then, the leaders of multistate networks display a penchant for subordinating their egos in the service of organizational coherence. Whether empowering regional administrators who feel emboldened to make decisions that could be construed as threatening by more insecure leaders or taking proactive measures to make themselves less indispensable, these leaders succeed by subjugating themselves to their organizations' missions.

Leaders demonstrate humility by ceding meaningful authority to regional administrators without becoming preoccupied about whether they are perceived as omnipotent. By revamping their organizations' structures to empower local administrators and boards, Winslow and Lovell consciously chose to make themselves more peripheral to the day-to-day functioning of their satellite regions. Gilbert described Playstead Prep's CMO value proposition as heavily weighted toward the pre-opening and launch phases where its expertise can set a region up for self-sufficiency. As regional "reliance on the CMO diminishes over time," Gilbert has built a measure of planned obsolescence into the Playstead Prep business model. Patrick noted during an interview that the management agreement between the satellite region and the CMO is "much different now than when we started. There are less services needed, as we've put more structures and systems in place, and there's less we have to rely on them for." Holt described Reservoir Academy's organizational trajectory as landing its chief executive in the role of "cheerleader" vis-à-vis individual campuses. During our walkthrough of a Reservoir Academy school in the network's satellite region, Holt texted a central office colleague to praise the efforts of an administrator who reports directly to that colleague.

Across the board, the regional administrators interviewed for this study suggested that they were singularly qualified to act either in outright defiance of network expectations or without explicit authorization in the hope of receiving retroactive ratification. The extent to which independent claims of uniqueness were made using strikingly similar language is revealing: while network leaders were observed taking steps to make themselves less irreplaceable to their multistate systems, regional administrators routinely positioned themselves as non-fungible linchpins. Successful leaders of multistate networks appear to understand that allowing regional administrators to exercise the autonomy needed to secure their standing with local stakeholders will ultimately inure to the benefit of their networks.

With Playstead Prep and Cadence Collegiate operating in a highly regionalized fashion, Patrick and Rogers identified their comfort operating in ambiguity as central to their ability to thrive in their roles. When discussing Playstead Prep's network design, Patrick said, "Some of it is differentiated for me, to be honest, because I do come with a different skill set." Patrick expressed an aversion to receiving top-down directives and recounted a conversation with a counterpart in the Playstead Prep satellite region who was pleading with the central office to "tell me what I should be doing." Patrick acknowledged that the response, which presumed that the leader would do whatever would be most effective in their specific setting, can be unsettling:

> I can see how an incoming leader could get frustrated with it not being prescriptive. He came on a call and said, "Autonomy is not really important to me." I said, "We couldn't be further apart on the spectrum." I'm sometimes willing to fight over *guidance*. You know, "That suggestion sounded a little too strong to me." ... I don't think I could be an ED for a school in [another charter network] where it's more, "This is how we do it." I'm not really a "This is how we do it" [person].

Patrick said that the management agreement between the CMO and the Playstead Prep regional board continues to contemplate central office support services that are superfluous at the moment but which might be beneficial at another time: "We don't make procedures or agreements based

on me because we're constantly talking about the fact that I'm not going to be here forever." Preserving the contours of the institutional relationship even when the individuals working in the flagship and satellite regions are not strictly adhering to the express contractual terms of the management agreement allows Playstead Prep to plan for sustainability.

Like Patrick, Rogers explained that some people in their position "might prefer it more rigid." From the standpoint of colleagues "coming from more prescriptive environments, it can be hard. They're used to more of a paint-by-numbers approach—here's the manual, here's how you do it." Rogers compared the classroom setup expectations in Cadence Collegiate's satellite region ("a one-pager with general guidelines") with the 12-page procedures propounded by another charter network. Much as how the intensity of Playstead Prep' CMO support services wanes as its schools mature, Rogers described the Cadence Collegiate central office as transitioning after the regional launch phase into a more "consultancy/advisory capacity, which I think is more of their strength." Rogers lauded Channing as "exceptionally savvy around facilities, lease negotiations," and other features of the pre-opening process and suggested that transitioning from planning to implementation has required working to figure out "our sweet spot in terms of what the network can deliver." Shifting the network's standard staffing model to include an executive director with Rogers's understanding of the operating environment and stakeholder landscape on the satellite region's payroll has resulted in a reduction of the management fee remitted to the CMO ("because of me," Rogers explained). Nevertheless, Rogers occasionally finds the central office to be a convenient foil when engaging with local stakeholders. Exploiting a gauzy understanding of the relationship between the school's local administrators and an unseen central office administration situated in another state, Rogers will plead an inability to act without proper authorization: "I can use it as an excuse a lot of the

time—'Oh, let me run it up the flagpole'—even though I know they'll be supportive of whatever we decide. It gives us backup." Here, coherence derives from system leaders having the humility not to object when being positioned as scapegoats by regional administrators seeking cover.

Collins and Vaughn similarly framed themselves as *sui generis* with respect to their ability to function as credible regional administrators for a national operation. Collins speculated that their experience within the Eclipse system and familiarity with the local community allow them to act decisively where others might run into red tape:

> If you put someone new in my seat, they'd have to present a whole lot of data to change the way we go about something like the staffing models. For me, it's "I've been in this thing for a while, this is the real life experience for the last four years, I need to make this change." Then it's, "Let's present it to Lovell as a wish list."

Vaughn shared that a Perennial model element that used to be "a no-touch" is now open for regional differentiation "because I showed it was effective. 'I'm doing it, try to stop me.' Now that it's done, they see it was the right move." Vaughn gasped in mock horror when channeling the central office's reaction: "That was a big deal when we did it. People were like, 'Oh my gosh, they're going rogue!' No, it just made sense for [our region]. It works for our region. It's what's best for kids. It's nothing outrageous."

The leaders of multistate networks appear to recognize that creating strong and sustainable satellite regions occasionally means allowing local leaders to assert authority so long as those flexes do not undercut the network's essential oneness. Preserving coherence requires network leaders to ensure that regional administrators do not freelance to the detriment of the network but rather that they exercise discretion in a manner that promotes the organization's mission. Similarly, network leaders must ensure that any superficial diminution in the standing of the central office that might accompany a regional administrator's arrogation of decision-making rights does not foment a broader willingness to flout network authority. At bottom, given

that these network leaders have embraced unusual levels of organizational risk in the pursuit of creating opportunities they believe will improve life outcomes for children, for them the long-term viability of a satellite region eclipses the vanity that comes from gratuitous displays of power. The next subsection explores how successful leaders pair their willingness to subordinate their egos in service of organizational objectives with the finesse and discretion they need to preserve network-wide coherence.

Exercising Finesse and Discretion When Wielding Authority

Cognizant of having to curtail any heavy-handed impulses lest they alienate the regional stakeholders they need to remain invested in their networks' missions, successful multistate CMO leaders are adept at wielding authority without resorting to reliance on the formal trappings of office. These leaders are restrained and measured. They draw on the relationships they have studiously cultivated to achieve coherence via influence and persuasion. With stakeholders in satellite regions resistant to mandates imposed by a distant central office and regional administrators inclined to heed their own counsel on matters of local importance, successful system leaders aim to preserve broad organizational alignment without defaulting to an imperious posture that would seemingly lend credence to any uncharitable sentiments percolating in those regions.

Study participants exhibited restraint in constructing and designing their networks. Several leaders mentioned declining overtures from political and philanthropic leaders in settings they determined to be poor fits for geographical, cultural, or operational reasons. Lovell refrained from prematurely divulging their opinion on how Eclipse's governance structures should evolve, preaching patience and attempting to avoid skewing the conversation that would inevitably take place. That kind of patience can wear on leaders who understand the need to act deliberately but

who find motivation in the urgency of the work. Winslow said that Perennial has "a powerful opportunity to explode in our regions" but acknowledged that laying the groundwork to position the network for that kind of growth is "a massive drag."

These network leaders also showed a deft touch when communicating with stakeholders whose schools they visit only periodically. Lovell and Holt interacted naturally and unhurriedly with staff, students, and administrators on their satellite regions' campuses; Winslow did similarly with regional board members at Perennial's off-site retreat. Channing and Gilbert, while confined to virtual meeting rooms, were evidently at ease when interfacing with their networks' regional boards. Channing and Winslow explained how they tactfully follow up on issues that catch their eye when conducting site visits. When Channing observed "avoidable behavioral challenges" during a recent visit to a Cadence Collegiate campus in its satellite region, they debriefed with a colleague at the CMO who traveled to the region to provide targeted support. "It's not my style to go down and say, 'Hey, what's going on here?' It's just, in a layperson's way, asking some questions." Winslow described taking a similar approach:

> When I do walkthroughs, I'm not trying to judge the model, but if I see things that are off I'm asking questions. Here, [one key design element] isn't fully on-model, and they've been told. For me, it's about the student experience. You're not enabling the kids to have as rich of an experience as they could, so I'd encourage you to reconsider. I remind them that that's not our model.

When leading questions are inadequate, Winslow still looks for ways to shape behavior without simply pulling rank. Two rhetorical questions that Winslow posed during our interview are illustrative. The first: "How do you say no without them feeling like they're the stepchild?" The second: "How do I indoctrinate that in a way that you understand the *why* and are bought in and believe it?" These queries lend insight into the mindset of leaders who prefer to accomplish with finesse what could theoretically be instituted by fiat.

Relentlessly Pursuing Improvement in Network Operations

Third, the leaders of multistate networks are unwavering in their pursuit of organizational improvement. To some degree, the complexity of the multistate framework compels leaders to adopt this philosophical orientation. That is, the need to remain compliant with changes to a regulatory regime in one of the network's regions often forces the precise kind of limited experimentation that allows discerning leaders to assess the relative efficacy of multiple approaches. The network leaders participating in this study were energized rather than enervated by the prospect of having to continually review and revise policies and practices to determine what works best for the children enrolled in their schools.

Leaders described viewing their multistate networks as microcosms of the broader charter school movement, fulfilling the sector's promise as an engine of innovation. Holt likened operating schools in multiple cities to operating a network of laboratories: "Would it be easier if we were operating in one city? Obviously. In one state? I'm sure.... [Multiple] labs are better than one lab. You're going to learn something that then gets transferred through purposeful PD sessions." Winslow remarked on the "neat innovations that come out of [our] regions that have made us better." Winslow mused on "how awesome it is just to learn so much" from having schools in multiple communities: "I understand things about this movement. If I'd only been in [our flagship region], I wouldn't have that experience. 'Wow, that's a brilliant move. Let's share that back out.' Or the talent we can share. I'm really lucky." Winslow suggested that the very complexity of Perennial's network design has contributed to its success.

> What we've learned, and it's been really powerful, is I don't think our model would get really good without having to serve different demographics, serve different kids. There's always one kid where it's like, "What do we do?" If you have more of those kids, you have to make systemic changes. Without that experience, other schools aren't as effective.

Channing expressed hope that schools in Cadence Collegiate's flagship region would learn from

its satellite region "in areas where they might be on to something better." Channing went on to

share that having schools in multiple communities

> forces us to be exposed to different ways of running a school. . . . I'm always amazed that
> [schools in other regions] manage to thrive with per-pupil funding that's half of what we
> have in [our flagship region] and in jurisdictions that aren't a lot cheaper than [our
> flagship region]. What are they doing differently? How do they organize themselves? Are
> there fewer mandates? It's important for district leaders to be curious about other models,
> and that's easier to do if you're running something that's multistate, multi-city.

Lovell identified the variable composition of educator workforces in Eclipse's regions as a key

factor in the network's growth. In the network's flagship region,

> the talent market is very easy to recruit to. People like to move there, but people don't
> settle there. After two years, they move on to the place they eventually want to be. If
> you're in [our satellite region], you don't move there because of Eclipse. There's
> probably lots of other reasons you're moving there, which means your talent funnel is a
> lot more narrow. You're finding people at a lower stage of career development, but when
> we do get you in the door most likely you'll stay. [Our flagship region] taught us how to
> build a recruitment engine for talent. [Our satellite region] is challenging us to build a
> development engine for talent.

Lovell noted that the network's more deliberate efforts to support the professional growth of

greener talent in its satellite region will "pay dividends" for its flagship region.

Regional administrators similarly identified the distinctiveness of their own schools as a

propulsive factor in their networks' development. Vaughn observed that the multistate construct

allows regions to "pilot" adaptations that can be assessed for suitability in other settings.

Differences in each state's operating environment, Vaughn noted, create "nuances in how we

approach things.... What's unique to Perennial in [its satellite region] is different than what's

unique about Perennial elsewhere." Network leaders must be cognizant of these differences

when assessing whether to codify a practice piloted in one setting. Patrick cautioned that a

CMO's attempt to export a programmatic variation developed in its satellite region could

backfire if ill-suited to other regions:

I learned a long time ago ... that you don't make a regulation that's not enforceable or that already has a caveat. If you're going to say, "This is how a program needs to run, and it's nonnegotiable," and you have a school that's not doing it, you're putting yourself in a precarious position.... I'm looking out for the best interest of my school. Is this program no longer one that works for us because they're codifying it in a certain way?

Patrick warned against the proliferation of carve-outs and special "rules" for each region.

Accordingly, the successful leaders of multistate networks must be nimble and reflective in their pursuit of organizational improvement. Lovell acknowledged shifting Eclipse's principal management structure away from one differentiated by grade band to one differentiated by region despite believing that the former would, "all things being equal," be more effective: "I underestimated the importance of credibility, the buy-in people would have if you were actually in the community with your manager." Winslow recalled revising Perennial's greenlighting process after conducting a searching self-examination following a botched rollout in a satellite region:

It was our first day of school, and there were no kids. I think we got to 50 that day. I asked, and our family recruitment guy says, "This is all that's coming. This is a terrible location." How the hell did we get here? How did I not hear this before? I clearly had a process set up where I wasn't enabling that kind of feedback ... I failed to ensure that the process had real regional engagement, real listening with regional team members. [Now] we pull in team members to make sure all hands are in the middle.

As these leaders steer their networks through changes to their models, they continue to consider how they can best support student growth. While Perennial was in the process of transitioning to a satellite region governance structure that featured a "best practice partnership model," Winslow shared with the regional board a vision for an eventual evolution into a fee-for-service model where regions could elect to opt in or opt out from a "menu" of centralized supports based on their individual needs. Lovell floated similar thoughts about how Eclipse might evolve to support even more students:

We have a set of centralized services that we offer to regions that we direct-run. Why not offer those to schools we don't directly run? It could be distressed school districts,

working with the state and these districts to basically stave off a state takeover by figuring out a partnership with an organization [like Eclipse] to help you.

In this hypothetical future, Eclipse would harness the institutional improvements it has made on the basis of experimentation in both its satellite and flagship regions and deploy them for the benefit of students attending non-Eclipse schools. In a sense, Lovell makes an argument that the leaders of multistate charter networks are well-positioned to make good on the sector's founding promise as an engine of innovation for all public schools regardless of governance model.

In this section, I created a composite picture of the successful multistate charter leader by synthesizing the key attributes possessed by study participants. In the next and final section of this chapter, I use pandemic-era schooling as a case study through which to examine both the challenges inherent in multistate leadership and the strategies for creating organizational coherence developed and deployed by these leaders.

Covid-19: A Case Study in the Challenges and Opportunities Inherent in Multistate System Leadership

At the height of the Covid-19 pandemic, educational policymakers within state agencies and on local school boards came under intense scrutiny as high-profile clashes over reopening, distance learning, masking, vaccine mandates, and other emotionally charged issues played out in contentious fashion. Within traditionally structured school systems, district leaders were whipsawed by evolving public health guidelines and increasingly antagonistic stakeholder groups as they sought to account not only for the academic progress of their students but for the social and emotional welfare of their students, staffs, and families. For the leaders of multistate networks, pandemic-era schooling served as a paradigmatic example of the discrete challenges inherent in their models. Remaining coherent as school systems while adapting to multiple states' policies, politics, and community norms required these leaders to deploy many of the ideological, structural, and interpersonal strategies explored earlier in this chapter. In the midst of

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an unprecedented crisis that roiled the foundations on which their networks stood, these leaders dispensed with institutional dogma as they acted urgently but with evident finesse as they looked for opportunities to strengthen the overall functionality of their organizations.

In this section, I examine how pandemic-era school operation both crystallized the unique challenges inherent in multistate network operation and presented opportunities for these leaders to reimagine what coherence within their organizations entails. First, I explore how Covid-19 posed a series of novel challenges for the leaders of multistate networks. Then, I review the strategies they employed to create coherence in the face of those challenges. And finally, I examine how the traits of successful multistate leaders came to the fore as they led their respective organizations through the pandemic.

Leadership Challenges Presented by the Multistate Paradigm During Covid-19

By any objective measure, the challenges attendant to leading public school systems during the pandemic were monumental. Coupling those challenges with the additional issues that stem from operating campuses in multiple jurisdictions made the work of multistate leaders doubly difficult. Lovell called the experience "shitty." Channing joshed: "I think the technical term is that it sucks. Thank God we're not in five or six states." Differential regulatory, funding, and political environments all posed challenges. One of the notable regulatory differences was the manner in which states approached year-end assessments during the 2020–2021 school year. While testing in Eclipse's satellite region was optional, policymakers in the network's flagship region imposed consequences on districts whose participation rate fell below a certain percentage. With central office administrators pushing for consistency throughout the network, Collins recalled having to communicate a confusing and unpopular message to the team in Eclipse's satellite region, which had not yet returned to in-person learning:

It was a random week for testing, and we were trying to get 95% attendance, which was wild. I had to deliver that message. I pressed the issue to the senior team around, "Why? Why does this matter?" If it's money, all [the people in the satellite region] want is for you to say, "We need some money." If it's to gather data, just name it. What's the reason? I'm reading this, and it's not because we have to. Tests aren't counting toward any accountability score. I think the message for [the flagship region] wasn't the same as the message here. Just give me something deeper.

Collins ultimately ended up framing the message to the satellite region around the need to obtain "accurate data so that we know what we're working with going into the next year." Collins shared that Eclipse's satellite region met its 95% participation target. Low student performance established a new baseline against which subsequent growth would be measured, a dispiriting if predictable development that Collins noted "wound up setting us up for success" in that improvements on the 2021–2022 assessments would appear more pronounced. Nevertheless, straining to collect student performance data ultimately proved largely unnecessary: "Turns out the whole country learned it was just a terrible year."

Eclipse also navigated differences in its regions' funding and political environments. Potter said that the Covid relief packages were substantially more generous in Eclipse's satellite region, which actually resulted in the region electing to leave money unclaimed in the spirit of equity if a determination had been made that the network's flagship region would not have the resources to implement a given measure. (Potter added that Eclipse's regional administrators were working through how to ensure resources appropriated for their students would not be left untapped.) On the political front, policymakers in the network's regions lifted mask mandates and mandated returns to in-person learning at different times. Potter said that the network would occasionally "default to the [measures imposed by the] more health- and safety-conscious state" for the sake of consistency. In a similar vein, Holt shared that Reservoir Academy's senior leadership would periodically suggest that if one region's policymakers mandated mask-wearing in schools then the network should require all schools to follow suit. Holt demurred, noting that

"Reservoir Academy, at some level, is an artificial construct. We don't necessarily need to do that just for organizational sake."

Issues associated with internal network structure were also magnified during the pandemic. Rogers observed that Cadence Collegiate's team in the satellite region more acutely felt the absence of the network's central office administrators. "It's tough during a pandemic to understand what that presence looks like," Rogers observed. Rogers, who repeatedly expressed an affinity for their network-based colleagues, worked to prevent a perception of the CMO as anonymous bureaucrats from taking root. Staffing accommodations made by the central office during the pandemic, however, posed real concerns. Rogers explained:

> It's hard for people to be here. Because of the pandemic, people have varying comfort levels with travel. It adds real complexity. The network has recognized—they had a number of folks who shifted to remote gigs during the pandemic and who don't live in [the flagship region] anymore. That was fine for a while, but now it's really not, because they know people have to be able to get to schools quickly. [If we were closer and] you had 10 teachers call out or two leaders call out, you could call the network and say, "We need bodies." You can't do that quite as easily.

Strategies for Creating Organizational Coherence During Covid-19

With their organizations in uncharted waters, network leaders rifled through their toolkits to find the strategies that would create some semblance of coherence. From an ideological standpoint, the abrupt pivot to universal work-from-anywhere created a sudden parity among colleagues in different regions. That is, the geographical remove that had previously been a defining feature of satellite regions now applied with equal force to peers in the flagship region who were also deprived of regular in-person access to their central office colleagues. This, in turn, fostered a oneness born of mutual exposure to shared trauma. Potter observed that "Covid pulled the organization together in a way. We were all removed so we were forced to work together even though we're in different states." At Reservoir Academy, Cutler shared a similar story of colleagues in different regions coming together to build something on the fly:

Things get built informally through friendships, partnerships, sharing. In March 2020, when we closed schools and went remote, we did it all within four days. We gave out a couple thousand laptops and went to live synchronous learning in four days, and that started with a few of us drafting this 14-page document of how to do this. And then all of a sudden everyone did it. It was kind of a magical story. We met every other day for weeks, just figuring out how to teach online.

Cutler admitted that "none of it really ended up working. But it didn't matter where we lived; all of a sudden we were just a giant team working on this thing."

From a structural perspective, network leaders who had prioritized clustering their schools in geographically proximate areas benefited from states sharing similar political climates. For Playstead Prep, Gilbert said that both the satellite and flagship regions shared a "very similar dynamic" in that they transitioned to remote learning and imposed mask mandates on comparable timelines. Several networks also invested in strengthening their communications infrastructure and decision-making processes to account for social distancing requirements that occasioned a universal transition to remote work. Gilbert acknowledged that communication with satellite regions "became, in some ways, worse during the pandemic" but credited a CMO colleague at Playstead Prep who had previously worked in a central office capacity for a large district with introducing videoconferencing technology as a communications medium before Covid's onset. "We couldn't come in person, but we normalized Zoom," Gilbert said. Collins delighted in tracing the evolution of Eclipse's videoconferencing technology, which has—with the pandemic's gradual abatement—coincided with a general trend toward more robust communication between the central office and the network's satellite region:

It has matured over time such that at one point we were always on some sort of version of Zoom that was like sketchy internet and a poor connection. We had to do our own thing and we weren't sure we were aligned in terms of PD. To now, we've got quality Zoom and frequent visits from the senior management team!

For the two networks moving away from centralized decision-making, staffing, and governance models, Covid dramatized both the need for stronger regional leadership and the

perils associated with ceding control. For Eclipse, whose pivot toward greater regionalization had already shifted the manner in which key decisions were made, the pandemic accelerated the push to incorporate local voices: "More aggressively than ever before," Lovell said, "we're asking families and kids, 'Here's what we know. Here's what the CDC is saying. What do you want?' And then we differentiated." Collins said that Eclipse's regions "were grounded in the same principles around making decisions, coming from senior management all the way down." Within the satellite region, Collins continually surveyed staff and parents to understand the barriers that might prevent them from returning to campus and to gauge their comfort level with in-person schooling. Collins said that the network's central office "didn't force our hands in reopening" and explained that Lovell had been supportive "because we were clear on how we were making decisions."

Collins and Lovell both described according greater weight to the opinions of internal stakeholders than to the stated preferences of policymakers. "Every time we made decisions around Covid, we made clear what place public officials have in that," Collins said, "and they're pretty low." Obliquely referencing the 'strange bedfellows' dynamic that places charter operators at cross-purposes with their political supporters, Lovell said that Eclipse's regions were unmoved by broader sentiments around the necessity of social distancing.

> We were operating with conservative white governors who had similar positions on race equity and Covid policy. We probably could have opened earlier, but white folk who say that forget that at the time we were still using Clorox on cereal boxes. We had no idea of the implications of long Covid. Our families have less access to the safety nets that allow them to navigate unknowns. Before the foreclosure and college debt crisis, unforeseen medical expenses was the number one cause of bankruptcy in our country. I get a bit indignant when I hear rich white folk talking about that stuff.

For Perennial, which was undertaking a similar transition toward greater regionalization in its staffing and governance models, Winslow said that Covid "hastened our move toward local leadership." The pandemic, Winslow said, "stamped that you need a local leader to stand in front

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of staff and say, 'Here's what we're gonna do and why' in a way that makes sense for the region. They don't want to hear from me." Winslow said that the allocation of decision-making responsibilities between the central office and regional leadership evolved throughout the pandemic. To some extent, Winslow said, prioritizing centralization allowed Perennial to create and disseminate a virtual learning model and to identify common health and safety protocols. "It's huge to have the consistency," Winslow shared. "The floor is to operate and to stay safe. Then you've gotta make some choices."

To make those choices, Vaughn shared that Perennial's satellite region "went to super-decentralized command," bringing in school leaders for input on all key policy decisions. With respect to mask policy, Vaughn said that the network could "hide behind" the district when a broader mandate was in place but was on the verge of becoming the first Perennial region to become mask-optional as local policies evolved. Getting out in front of the network in that respect, Vaughn said, was likely to make some local stakeholders "uncomfortable."

Notably, mask policy was not the first area in which efforts to transition decision-making responsibilities to Perennial's local stakeholders came into conflict with network-wide consistency. Vaccine mandates, Vaughn shared, were where things "got really hairy." Whereas Perennial's flagship region permitted the imposition of vaccine mandates, its satellite region did not. The regional board—which at the time existed strictly in an advisory capacity—voted to require vaccinations notwithstanding this prohibition. Vaughn, concerned that the school would be "shut down" (or, at the very least, become "the target of all charter schools" in the state), solicited opinions from stakeholders and lawyers in an effort to "bring the board back." Winslow, who attended the board meeting at which the board cast its vote to mandate vaccines, advised letting the situation play out:

We have a doctor on the board who deeply believes in this. The meeting ends, and I said to Vaughn that they were responding to the vaccination rate being low in their schools, and they were pissed, so they said, "Alright let's mandate it." Let's talk about the risks. Are we really going to be the one charter in [this state] who defies the governor and mandates it? There's a lot at stake there. A lot can come crashing down. We called another meeting and we came with the recommendation that we don't recommend you do this. The worst case scenario was that the governor wouldn't [fund your school], you know the district isn't going to, and I don't have $14 million.

With the satellite region still directly governed by a centralized fiduciary body in the network's flagship region, Winslow informed the regional chair that the network board was prepared to issue a veto should the region persist with imposing the mandate. As this crisis was playing out in the midst of conversations about transitioning to a management agreement structure, Winslow explained that an impasse under the new arrangement would have resulted in the CMO exercising its prerogatives as a single member to "blow up the board and reconstitute it." This, Winslow noted, would be tantamount to "nuclear war for everybody." Thankfully, Winslow talked the board chair "through the consequences, and they got it." The takeaway, which segues neatly into a rundown of the interpersonal strategies deployed in the service of coherence during the pandemic, is that "if you have the right relationships, the right partnerships, you can work through those issues: 'I think you're saying you're pissed that the vaccine percentages are low. Let's talk about how to get them up. That's not the path.'"

While Winslow's handling of Perennial's governance tempest showcased the value of nurturing relationships, the principal interpersonal strategy deployed by multistate network leaders pursuing coherence during Covid-19 was the identification and empowerment of high-capacity regional leaders. With Cadence Collegiate's satellite region launching during the pandemic, Rogers lamented that "there's so much of my job that I haven't been able to do because I've been a Covid quarterback." Alternately describing the "whole system" as either "breaking" or "buckling," Rogers described challenges associated with providing necessary

services for students with disabilities, meeting the social and emotional needs of teachers and families, and building relationships with board members. When opining on the challenges associated with efforts to preserve organizational coherence while negotiating distinct public policy landscapes, Rogers used a series of single-word descriptors: "Dizzying. Infuriating. It's insanity. Everything's different." Rogers did, however, identify certain benefits that come from serving as a regional administrator in a multistate network during a time of constant experimentation:

> It also gives us important perspective to get out of [our region] and to see what's going on in [our flagship region]. We have that data point to say, "Here's what's going on in [our flagship region]." It gives us flexibility and perspective either to pilot things or to see our sister schools doing something before you have to.

Channing acknowledged that Cadence Collegiate was reliant on Rogers to closely monitor the local context in the network's satellite region. Without such a capable leader filling that role, "we'd be stretching to do that."

Attributes of Successful Multistate Leaders on Display During Covid-19

The attributes of successful multistate leaders were on full display during the pandemic. In according broad deference to regional decision-makers, CMO executives were not simply acquiescing to the demands of the broader policy environment but, in some cases, were actively choosing to subordinate their own egos and visions for the sake of organizational coherence. In the midst of steering Reservoir Academy toward becoming a *more* centralized network, Holt exhibited evident humility in recognizing that pandemic policy was not conducive to top-down policymaking:

> We were hoping to drive it from the center but very quickly realized that we had to drive it according to [our regions]. When it came to opening and closing, mask wearing, the other health layers that were in place, we described how regions could move from one layer of safety to another but then allowed regional leaders to monitor that and determine whether they'd met that goal.

This decentralized approach, which Holt and Reservoir Academy had been working to outgrow, resulted in regions adopting "slightly different policies" and moving away from mask mandates on different timelines.

At Playstead Prep, Patrick leaned into their preferred posture as an independent administrator eternally prepared to buck network preferences for the perceived benefit of the satellite region. Patrick made "very clear, declarative statement-wise" to central office leaders that the region would adhere to state guidelines without either mandating additional precautions or permitting fewer. When the network team asked the region to enforce a policy that would have excluded certain unvaccinated individuals from a network-provided perk, Patrick resisted:

> I said I wouldn't enforce it because it's not in alignment with what's happening in [our state]. I said, "You're in charge of [this program], you can enforce it." I simply said no.... There was a strongly worded letter about why we should enforce it, and we replied with a strongly worded letter back saying it was their responsibility to enforce it if they wanted to. It kind of sat there afterwards.

While this stalemate presumably resulted in a policy being enforced inconsistently across regions, it demonstrated how a network leader more concerned with long-term sustainability than with short-term uniformity can pursue coherence by allowing regional administrators to periodically assert their primacy in a way that enhances both their local standing and their institutional ties.

Winslow's adroit handling of the aborted attempt to impose a vaccine mandate in Perennial's satellite region dramatized the importance of exercising finesse when wielding authority. While the prospect of the network board countermanding the region's vote certainly strengthened Winslow's negotiating posture, the manner in which Winslow worked with regional board members evinced a light touch. And, while remaining attentive to the toll the pandemic was exacting on their students, parents, and staff, network leaders also understood that circumstances compelled innovation. During the transition to a remote work environment,

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Reservoir Academy's senior leadership seized an opportunity to create a new mechanism

through which administrators across the network could collaborate. During bi-weekly, three-hour

"power meetings," Cutler said, principals would model skills over Zoom for peers to observe,

internalize, and adapt for their settings. While well-intentioned network leaders were creatively

"solving for a gap of how we get more people to see an exemplar live," Cutler said, the format

did become burdensome for campus leaders dealing with pressing concerns:

> That meeting sometimes felt valuable. It was a cross-regional thing. What happened was some schools were more stable than others, some were more staffed than others, and as you got to October, you could see it was very tough for some campuses to attend. We did it for the full year, and it was like pulling teeth by the end to get some people to come. It was just a new thing put on everyone's calendar to honor a new initiative that ended up being harder for some schools to do.

This imperfect effort to create coherence in a remote environment could easily have occurred

within any organization fitfully adjusting to the realities of pandemic-era work. Within the

construct of multistate school systems, however, the personnel being summoned to these Zoom

meetings had already been geographically distanced prior to the pandemic's onset. Accordingly,

the importance of finding workable structural solutions to the challenges inherent in remote work

settings was arguably heightened in this unique paradigm. For the leader of a multistate CMO,

this trial-and-error period presented an unexpected opportunity to strengthen communication

between scattered educators all attempting to reconcile the network's model with their regions'

distinctive operating conditions. As such, identifying effective communication norms would

have meaningful long-term implications on their organizations' sustained functionality.

Summary

This chapter presents the key findings from a collective case study that explores how the

leaders of multistate school systems create coherence within their organizations. Data from

interviews, observations, and artifacts were triangulated, and the resulting analysis revealed

commonalities, distinctions, and trends that illuminate how these leaders navigate the barriers that imperil the creation of coherence in the multistate construct.

The first set of findings in this chapter concern the factors that compel system leaders to adopt a multistate organizational model. This section outlines both the 'push' factors that convince leaders to pursue fulfillment of their missions across state lines and the 'pull' factors that entice leaders to situate their replication campuses in specific communities.

Next, I described the challenges inherent in the multistate paradigm that complicate efforts to generate the organizational alignment, shared mindsets, and commonality of purpose that characterize coherence educational institutions. These challenges are attributable both to the external environment (e.g., the prevailing regulatory systems, funding landscapes, and community mores in the regions that contain their schools) and to internal design features that can accentuate divisions between central offices and geographically remote campuses.

After enumerating these challenges, I examined how the leaders of multistate systems create coherence within their organizations. These leaders deploy ideological strategies designed to engender an *esprit de corps* and shared sense of purpose; structural strategies that implicate where schools are located, how they are governed and staffed, and the manner in which communication occurs and decisions are rendered; and interpersonal strategies that prioritize the identification, cultivation, and development of key stakeholders in satellite regions.

The fourth set of findings addresses the observable characteristics of successful multistate leaders. A composite sketch of this leader was generated by synthesizing the data and noting that study participants tended to subordinate their egos for the betterment of their organizations, to exercise finesse and discretion when wielding authority, and to pursue improvement in network operations with relentless fervor.

Finally, this chapter reviewed the manner in which Covid-19 both dramatized the challenges of multistate system leadership and required leaders to utilize each of the identified coherence-building strategies in order to preserve basic organizational functionality and to pursue systemic improvements during a period of unprecedented disruption and dislocation.

Chapter 5: Interpretation, Implications, and Recommendations

This study explores the manner in which leaders of multistate charter networks navigate the disparate policy landscapes, operational conditions, and stakeholder expectations that characterize the communities in which their schools are located. In the preceding chapter, I presented the key findings that emerged from analysis of the data collected through interviews, observations, and document review. Specifically, I described how leaders of multistate charter networks deploy a range of ideological, structural, and interpersonal strategies in an effort to create organizational coherence within their geographically non-contiguous school systems. I also constructed a composite picture of the successful multistate system leader based on the observable attributes of study participants and explained how pandemic-era schooling both concretized the challenges inherent in the multistate paradigm and compelled leaders to refine and reimagine the manner in which they pursue coherence.

This chapter situates the study's findings within the broader policy landscape and research context. The study's significance is premised, in part, on the theory that the chief executives of multistate CMOs represent a subspecies of educational leader ripe for deeper examination. Successful charter operators have powerful incentives—intrinsic, regulatory, and financial—to expand their proven models beyond their communities of origin. As noted, these leaders remain underrepresented in the literature relative to the prevalence and influence of multistate networks within the broader public education firmament. Moreover, because the structure of multistate systems necessarily requires system leaders to maneuver through a relentlessly convoluted maze of internal dynamics and external stimuli, the moves these

individuals make when spearheading organizational improvement efforts have resonance for

leaders in other sectors. Complexity necessitates innovation and execution; close study of

practitioners operating within these constraints can pinpoint practices worth emulating and

illuminate traps to avoid.

The remainder of this chapter is structured as follows. First, I analyze findings through

the prism of the relevant literature on charter replication and organizational coherence, focusing

principally on the two drivers within Fullan and Quinn's (2016) Coherence Framework that have

particular salience within the multistate context. Second, I explore the implications of the

findings for a range of key stakeholder groups including policymakers, funders, charter

networks, and traditional school districts. Finally, I proffer recommendations for further research

in light of the findings generated within this study.

<div align="center">**Interpretation**</div>

The primary theoretical lens through which I am interpreting this study's findings is the

Coherence Framework propounded by Fullan and Quinn (2016). As this framework provides a

window through which to observe and analyze the actions of system leaders who guide their

organizations through successful change efforts, it has direct applicability to the actions of CMO

executives given the challenges that expanding networks have faced when attempting to maintain

quality (Wohlstetter et al., 2011, 2015). Fullan and Quinn (2016) have contended that

educational leaders bring coherence to their organizations by seizing on four "drivers" of

sustained systemic improvement: (1) focusing direction; (2) cultivating collaborative cultures;

(3) securing accountability; and (4) deepening learning. Two have strong relevance within the

multistate paradigm: focusing direction, which requires reconciling internal priorities with a

patchwork quilt of regulatory demands; and cultivating collaborative cultures, which requires

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leaders to build rapport, to develop a shared moral imperative, and to sustain trust without the benefit of frequent in-person touch points.

Throughout this section, I draw liberally from the research on both charter replication and organizational coherence within educational systems to add color and specificity to the framework proposed by Fullan and Quinn (2016). Accordingly, the findings related to study participants' efforts to focus direction are viewed in light of research suggesting that coherence-making is a dynamic process; that establishing a clear direction requires central offices, regions, and campuses to work in concert; and that organizational direction cannot be charted independent of external conditions. I then examine the findings connected to leaders' efforts to cultivate collaborative cultures in the context of research highlighting the importance of creating a pervasive sense of "systemness" or "oneness"; the centrality of building and maintaining trust; and the indispensable role of regional administrators in fostering a shared moral imperative.

Focusing Direction

To focus direction, a leader must be purpose-driven, articulate impactful goals, adopt a clear strategy, and engage in change leadership (Fullan & Quinn, 2016). Coherent organizations instantiate practices that advance institutional objectives, design structures that promote key policies, and ensure that actions undertaken within one department or at one site are not inconsistent with those being undertaken elsewhere (DuFour & Fullan, 2012; Grossman et al., 2008; Johnson et al., 2014). The multistate context poses challenges for educational leaders attempting to focus direction, as divergent regulatory environments and political backdrops can make objectives and metrics that appear reasonable and attainable in one community ill-suited for another. The manner in which the multistate leaders participating in this study have attempted to focus direction within their organizations can be viewed in light of research suggesting (1) that

coherence-making is a dynamic process; (2) that organizational leaders must truly and authentically involve regional and campus-based leaders when charting an organization's direction; and (3) that sensitivity to shifting external conditions is a prerequisite to the creation of a clear organizational focus.

Coherence-Making as Dynamic Process

Creating coherence is a dynamic and ongoing process, not simply a one-off endeavor that results in either lasting triumph or terminal failure. Fullan and Quinn (2016) describe the "consistent, collective shaping and reshaping of ideas and solutions" as the bedrock of "deep coherence" (p. 47). Successful educational organizations "must have the capacity for *continuous coherence making*" (Campbell & Fullan, 2019, p. 95). Honig and Hatch (2004) have used the word "craft" as a transitive verb acting upon coherence as a direct object to emphasize the importance of iteration and constant recalibration of goals and strategies in light of shifting circumstances. The development of a clear organizational focus is the residue of a system-wide commitment to continuous learning and improvement (Fullan & Quinn, 2016). Focusing direction requires "initial and continuous engagement" (Fullan & Quinn, 2016, p. 46) and "ongoing focused interaction" (Campbell & Fullan, 2019, p. 68). For an educational organization that has grown as a result of a successful program being replicated in new settings, "continued legitimacy and sustainability" hinges on a central office's "dynamic capabilities" (i.e., its ability to drive continuous improvement efforts through information gathering, transmission, and evaluation processes) (Peurach & Glazer, 2012, p. 169). Critically, Johnson et al. (2014) concluded that there is no one correct way for a school system to create coherence; more important than the selection of a centralized or decentralized approach is the skill with which the chosen model is executed.

Much as how the five districts studied by Johnson et al. (2014) pursued coherence in meaningfully different ways—some skewing toward rigid centralization, others erring on the side of hyper-decentralization—the five multistate CMOs participating in this study adopted different tacks in the pursuit of coherence. Notably, rather than hew to a fixed conception of how to fashion their systems, these leaders described loosening and tightening based on considerations including personnel capacity, network maturity and scale, and intolerable variability in student performance data. With respect to the "rigorous centralization" / "radical decentralization" dichotomy articulated by Johnson et al., two of the networks included in this study's sample—Cadence Collegiate and Playstead Prep—generally subscribed to a decentralized approach (though the nature and intensity of this commitment could fluctuate depending on circumstances). Consistent with the literature framing coherence-making as a dynamic process, the other three networks underwent discernible philosophical shifts, with two (Perennial and Eclipse) morphing from tightly centralized to situationally more decentralized and the third (Reservoir Academy) becoming intentionally more centralized within key aspects of its operation.

Consequently, a loosely trifurcated categorization scheme emerged with Playstead Prep and Cadence Collegiate serving as the *regionalization originalists*, Perennial and Eclipse as the *progressive regionalizers*, and Reservoir Academy as the *incremental centralizer*. Playstead Prep and Cadence Collegiate, with their boutique models optimized more for breadth than for saturation within a market, both embarked on interstate replication efforts intent on empowering their satellite regions with significant autonomy. With independent fiduciary boards, high-capacity regional administrators with deep community familiarity and the formal trappings of authority that come with being tapped as "executive directors," and fewer visible indicia of

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network affiliation on their campuses, these satellite regions were deliberately vested with broad latitude to tailor their programs to local operational requirements and to identify and address the needs of their constituents. Nevertheless, evidence of dynamic coherence-making within these organizations remained visible. Gilbert, who expressed revulsion at the prospect of exhibiting the heavy-handed leadership tendencies they associated with innovation-inhibiting school systems, interceded when their self-described "*laissez-faire*" posture led to variable implementation of the Playstead Prep model and, in turn, inconsistent student learning outcomes. At Cadence Collegiate, the collective process of iterating solutions played out during the pandemic, where Channing relied on Rogers to be hyper-attuned to the operating climate in the network's satellite region while Rogers closely observed developments in the flagship region to glean ideas for the region's benefit.

As *progressive regionalizers*, both Perennial and Eclipse took meaningful steps during the project period to shift the locus of decision-making authority from the CMO central office to the satellite region. These moves were arguably emblematic of a broader trend among multistate operators toward heightened responsiveness to the expressed preferences and needs of local stakeholders. Lovell and Winslow each used the word "hubris" to describe the ambitions and belief systems of earlier generations of education reformers; a little more than a decade ago, Lake et al. (2010) reported survey data that revealed "providing community outreach training" to have been ranked as a "very important" CMO central office function by the smallest percentage of respondents. In 2022, with brash triumphalism having yielded to a more circumspect solicitousness, Lovell acknowledged Eclipse was searching for ways "to walk in partnership with our parents" and to incorporate more "on-the-ground feedback" when attempting to adapt its model for success in the satellite region's environment. Winslow, after successfully advocating

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for policy modifications that allowed Perennial's national board to govern schools in its satellite region, altered course and determined that the legitimacy that derives from local governance outweighs the potential inefficiency of board proliferation.

The evolution of these leaders' perspectives mirrors the dynamism evident within the organizations they helm. From a coherence-crafting standpoint, these network leaders engaged in ongoing assessments of network operations and concluded that ensuring long-term sustainability after a certain inflection point required structural changes. In addition to revisiting their governance structures, both networks adjusted their staffing models, creating executive director roles, building out the CMO presence in their satellite regions, and transforming some central office personnel from execution specialists to coaches and advisors. The pandemic served as a catalyst for Perennial's move toward greater regionalization, with Winslow observing that messages with a high emotional valence needed to be delivered by someone with deep local cachet. As the pendulum swung toward decentralization within those networks, the dynamic process of assessment and recalibration remained ongoing; Vaughn expressed apprehension about the possibility of becoming overly siloed in Perennial's satellite region, while Lovell and Eclipse's national board contemplated the further evolution of the familial relationship between the network's flagship and satellite regions.

Reservoir Academy, by contrast, could be classified as an *incremental centralizer* as observed during the study period. With student performance data on certain campuses signaling that the network's instructional model was being interpreted and implemented inconsistently, Holt oversaw a tightening of Reservoir Academy's academic program with a parallel alignment of its operational practices forthcoming. While the pandemic served as an accelerant in Perennial's shift toward greater regionalization, it conversely slowed Reservoir Academy's

transition toward increased centralization as Holt and the central office leadership team came to appreciate the difficulty of attempting to steer regional policy from CMO headquarters. As Reservoir Academy iterated its collaboration and decision-making structures through a period of sustained educational disruption, occasionally piloting initiatives that proved at least somewhat burdensome on regional stakeholders, it continually recalibrated how to leverage institutional resources in order to narrow intra-network achievement gaps.

Systemwide Involvement

Coherent organizations meaningfully involve local and regional stakeholders in the creation of system-wide objectives. Effective central office leaders facilitate collaborative goal-setting processes and secure participation from campus administrators when charting organizational direction (Marzano & Waters, 2008). Research suggests that insistence on centralized decision-making within CMOs may lead to increased turnover among educators who expect to possess autonomy and to exercise discretion (Torres, 2014). Accordingly, Honig and Hatch (2004) have explained that effective system leaders work in tandem with campus administrators to "collect information about schools' goals and strategies" and to use that information strategically when creating network support structures (p. 27).

Replicating CMOs must take care not to abandon their commitment to shared decision-making lest an inattentiveness to local considerations result in the diminution of community voice in school operations (Wilson, 2016). To ensure essential information developed and possessed in a satellite region makes its way into an organization's formalized decision-making apparatus, a central office must engage its regions in a collaborative process for sharing and retaining institutional knowledge (Peurach & Glazer, 2012). Savvy leaders design institutional structures that permit enterprise-wide involvement in decision-making and goal-setting processes

and appreciate the symbolic value of local stakeholders claiming partial ownership of an organization's direction (Bolman & Deal, 2017).

The network leaders participating in this study routinely engaged regional stakeholders in organizational goal-setting and decision-making processes. Holt and Lovell described how system-wide goals at Reservoir Academy and Eclipse respectively are constructed in collaboration with regional leaders, ensuring that schools in different locales share a common direction. At Perennial's regional governance retreat, Winslow worked with board members and administrators to crosswalk local objectives against network-wide goals. Consistent with the dynamic nature of coherence-making, Lovell led Eclipse through a transition from both an annual goal-setting exercise and a dense but unfocused data dashboard to a multi-year strategic planning effort from which annual priorities will be derived and a more streamlined tracker to assess progress on measures of paramount importance. The existence of common goals allowed network leaders to provide targeted support, with all five network leaders indicating that they calibrate the nature and intensity of services for schools in satellite regions based on their demonstrated and professed need.

Study participants also acted with intentionality to assimilate into the central office institutional knowledge warehoused within satellite regions. Network leaders and regional administrators at Playstead Prep and Cadence Collegiate described how active two-way communication between key stakeholders in satellite regions and their central office colleagues facilitated responsive and informed decision-making processes. Relatedly, Cutler touted the symbolic value of having cross-regional representation on the working groups Reservoir Academy empanels when test-driving new initiatives, remarking on the importance in

"storytelling" terms of stakeholders in satellite regions being able to claim authorship of network-wide practices.

Dynamic approaches to the development of communication and decision-making protocols also supported network leaders in their pursuit of organizational coherence. Lovell, for example, traced an evolution in Eclipse's decision-making structures to incorporate more "on-the-ground feedback" and was observed requesting evidence of parental preference from a campus leader in Eclipse's satellite region when approached with a request to restore the network's abrogated policy on school uniforms. Lovell separately suggested that generating alignment on a given topic may have value from a coherence-creation standpoint even if it temporarily leads to less favorable outcomes insofar as it "force[s] us to come together around a shared vision on something." The pandemic once more provided a prime (albeit unwelcome) opportunity for network leaders to reassess and reimagine their communication and decision-making protocols. While the geographically dispersed networks in this study had already normed on the videoconferencing platforms that would gain widespread adoption during the broader transition to remote work, they sought to strengthen their communication protocols and leverage their familiarity with the technology to bring swaths of stakeholders together. And with regional administrators at Perennial (Vaughn: "We went to a super-decentralized command structure"), Eclipse (Collins: "[The central office] didn't force our hands ... because we were clear on how we were making decisions"), and Playstead Prep (Patrick: "We were asked to enforce a policy ... [and] I said I wouldn't enforce it") asserting their authority with unmistakable conviction, network leaders subordinated their egos for the benefit of their institutional missions and recalibrated where decision-making responsibility rested on matters of consequence. Lovell

confirmed that the pandemic had prompted Eclipse "more aggressively than ever before" to involve local stakeholders (including students and families) in the decision-making process.

Adaptation to External Conditions

The process of creating coherence within educational organizations entails reconciling institutional priorities with environmental conditions. Effective leaders create coherence by converting external policy demands into system-specific initiatives that "represent an amalgam of external policy and internal goals and strategies" (Rorrer et al., 2008, p. 323). Central office leaders help regional and campus-based administrators "negotiate external messages as they work to craft coherence" (Rigby et al., 2018, p. 35). Working in harmony, these leaders "continually craft the fit between external policy demands and schools' own goals and strategies" (Honig & Hatch, 2004, p. 19). Within "loosely coupled" systems such as multistate charter networks, leaders can facilitate the creation of coherence by empowering regional administrators to "adjust to and modify a local unique contingency" on the basis of their heightened sensitivity to external conditions (Weick, 1976, p. 7).

Within the milieu inhabited by study participants, CMO leaders must take into account market imperatives, public accountability requirements, and community priorities when shaping their internal operations (Glazer et al., 2019). Peurach and Glazer (2012) have stressed that transitions from "fidelity of implementation to adaptive, locally responsive use" result from regions making model adaptations in response to "local exigencies and environments" and central offices formalizing the most effective adjustments as institutional best practices (p. 167). With financial constraints occasionally compelling charter operators to recruit progressively larger student populations in order to generate the economies of scale that make their operations sustainable, networks must remain attuned to demographic differences in the regional

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composition of their student bodies when designing staffing and support structures (Holyoke, 2008).

Within the multistate context, modulating an organization's internal goals and strategies to comport with the dictates of discrete sets of external demands functionally requires leaders to preside over perpetual continuous improvement cycles. As explored in this study, the multistate construct presents a unique set of regulatory, financial, political, and cultural challenges. Successful network leaders remain attuned to the implications of these jurisdictional incongruities on operations and morale within their satellite regions. When the prevailing policy regime prompts a satellite region to make locally responsive model adaptations—whether compelled by differences in funding, student and staff demographics, disciplinary codes, assessment systems, or transportation norms—astute network leaders attempt to assess the relative efficacy of competing approaches.

The network leaders participating in this study appeared to relish the opportunity to run these limited experiments. Holt explained that Reservoir Academy has benefited immeasurably from running a veritable network of labs and by systematically transmitting knowledge from one region to others through "purposeful PD." At Perennial, where Vaughn reported that an unsanctioned deviation from a previously "no-touch" model element had at least initially raised concern among central office personnel about the presence of a "rogue" actor in its midst, Winslow ruminated on how "awesome" it has been to harness the brilliance of educators working with specific students and within specific conditions for the benefit of others throughout the network. Regional differences in the talent pools from which Eclipse has sourced its educators have, according to Lovell, forced the network to build both a "recruitment engine" to serve one community and a "development engine" to serve another, with the benefits of those

learnings now accruing to the entire organization. And Channing, who marveled at the ability of some schools to produce results on shoestring budgets, expressed hope that Cadence Collegiate would be able to benefit from areas in which its "substantially resource-constrained" satellite region serving "substantially higher need" students had innovated its way into a superior practice.

During the pandemic, approaches to masking, reopening, and vaccination varied dramatically across states and municipalities. Central office leaders attempting to work with their regional counterparts to reconcile internal goals with external messages had to determine their comfort level with intra-network variance. Holt declined to insist upon uniformity, acknowledging that Reservoir Academy is somewhat of an "artificial construct" when explaining why it wouldn't make sense to require all regions to adopt the protocols of the strictest community in which the network operated. Eclipse appeared to prefer more consistency, with Potter remarking that the network would occasionally "default to the [measures imposed by the] more health- and safety-conscious state" and Collins recalling having been exasperated by the central office's push to have students in the satellite region show up in person to sit for their state assessments. By contrast, when Perennial's regional board moved to flout the state's political establishment by imposing a vaccine mandate that network-affiliated schools in other settings had in place, Winslow tactfully steered the region back toward compliance with state policy at the expense of system-wide consistency. While Winslow pointed to the network's longstanding commitment to prioritizing "tight" model fidelity when explaining how Perennial was able to generate "consistency" across regions in terms of remote learning, focusing direction during a generational public health emergency required Winslow and other leaders to determine which external policy conditions necessitated local differentiation.

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Cultivating Collaborative Cultures

Educational leaders work to build the collective mindsets that lie at the heart of coherence through their efforts to cultivate collaborative cultures. Campbell and Fullan (2019) have explained that coherence requires a "shared depth of understanding" (p. 9) and a "moral imperative" (p. 91) held in common by campus-based personnel, central office administrators, and board members. Generating goodwill and mutual affection allows leaders to create the coherence that lives "in the minds and actions of people individually and ... collectively" (Fullan & Quinn, 2016, p. 2). The actions undertaken by study participants in an effort to cultivate collaborative cultures can be understood through the lens of research suggesting (1) that a spirit of "systemness" or "oneness" pervades coherent organizations; (2) that creating coherence requires system leaders to build and maintain trust; and (3) that sustaining coherence in the multistate paradigm requires deep partnership with high-capacity regional administrators.

Oneness / Systemness

Organizational coherence is an ethereal phenomenon. Its leading expositors within the realm of public school systems stress that it is a wholly subjective concept, one that exists solely in "hearts and minds" (Campbell & Fullan, 2019, p. 94). Buchmann and Floden (1992) have explained that coherence—unlike mere "consistency"—incorporates "associations of ideas and feelings" and engenders a spirit of "connectedness" (p. 4). Network leaders must work diligently to generate the "mutual allegiance" and "social glue" that underpin this sense of "systemness" (DuFour & Fullan, 2012, p. 31).

Study participants took a number of deliberate steps to fashion a collective ethos within their organizations that would transcend the geographical and cultural divides among their constituents. Three of the CMOs in this study—Perennial, Eclipse, and Reservoir Academy—

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explicitly acknowledged being guided by a "one network" mindset. Leaders attempted to reify this mentality through the curation of universal core values, the development of a common lexicon and iconography, and the establishment of network-wide rituals and routines. Cadence Collegiate leveraged the adoption of a universal set of core values to create shared expectations for all stakeholder groups irrespective of location, while Eclipse used a shared linguistic and visual identity to spur affiliation with the network rather than with a single campus or region. Across the study sample, participants shared examples of network-wide rituals—including student chants and cheers, signing days and graduations, leadership summits, and staff outings and celebrations—that confer a sense of communal belonging. Playstead Prep, an outlier within several fields of exploration throughout this study, neither adorned the hallways of its satellite region campus with network-branded paraphernalia nor remained committed to prioritizing broad cross-regional gatherings as a way to transmit knowledge or to build fellowship.

Meanwhile, network leaders working to cultivate collaborative cultures through the construction of unified organizational identities also encouraged the development of regional pride. With the exception of Playstead Prep, CMO executives and regional administrators from each of the four other networks contended that operating environment, student demographics, and community personality can determine how a singular organizational mission manifests differently in each setting. Potter described Eclipse as being responsible for providing "guardrails" so that school- and regional-level identities could comfortably be subsumed within the broader "one network" ideal, while Perennial allowed each campus to select a fifth core value in addition to the four shared across all network schools. Study participants also explained how they attempted to draw strength from their institutional diversity, working to honor and embrace local distinctiveness that, if ignored or suppressed, could lead to a kind of regional chauvinism

antithetical to systemic comity. Administrators based in Cadence Collegiate's and Perennial's satellite regions shared examples of cultural practices originating on their campuses that have been adopted by schools in their networks' flagship regions, developments that have allowed their constituents to understand themselves as active co-creators of (as opposed to mere passive adherents to) a shared network-wide identity. Provincialism courses through any conversation about the proper way to educate the children within a given community. These leadership moves effectively serve to redirect some of the regional exceptionalism that might otherwise be channeled toward the creation of an oppositional "out-group" identity.

Building and Maintaining Trust

Generating and sustaining trust between stakeholders at all levels of an organization is key to creating coherence (Canrinus et al., 2019; Johnson et al., 2014). Trust is precious and fragile, as easy to squander as it is difficult to acquire. Central office leaders must work doggedly "over a long period of time" when attempting to cultivate trust (Johnson et al., 2014, p. 21). The fundamental "building blocks of coherence . . . involve leaders interacting widely in purposeful ways so that greater mutual allegiance and collective capacity are continuously fostered" (DuFour & Fullan, 2012, p. 24). DuFour and Fullan (2012) have explained that leaders make these trust-enhancing connections daily within "highly interactive systems" (p, 24).

Within the CMO context, trust can be imperiled when campus-based educators fail to see central office leaders (and regional administrators) making the adaptations to a network's model that they believe to be warranted (Durand et al., 2016; Torres, 2016b, 2016c). Trust suffers when educators are treated "like implementation puppets" as central office and campus leaders dictate the manner in which initiatives are executed (Lawson et al., 2017, p. 54). Finally, the multistate context heightens the importance of the intermediaries who serve as "agents of coherence" by

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providing connective tissue between central offices and campuses (Johnson et al., 2014, p. 67), and by engaging in "brokering" efforts by that consist of "bridging" siloed individuals to other individuals and resources that can make their work more purposeful and "buffering" campus-based personnel from "potentially unproductive external influences" (Honig et al., 2010, p. 42). When campus-based stakeholders view these intermediaries as disconnected, unhelpful, or culturally insensitive, their willingness to engage collaboratively with their CMO colleagues in the flagship region ebbs. Thus, for the leaders of multistate networks, building trust with stakeholders in satellite regions is an arduous process as physical distance can easily give rise to more pernicious spiritual and philosophical divides.

For the leaders of geographically non-contiguous networks whose structures render such robust interaction impracticable, opportunities for high-touch interpersonal engagement can be difficult to simulate. While one network leader observed that "trust is built by doing hard work together and really delivering," multiple regional administrators pointed to the lack of a consistent CMO presence in their communities as a barrier to engaging in the type of collaborative work that sparks the development of trust. While the perception of an absentee central office can breed ill will, equally corrosive is the presence of intermediaries viewed within the satellite region as unresponsive, unhelpful, or culturally insensitive. Regional administrators from Cadence Collegiate, Eclipse, and Perennial described how unproductive interactions between their teams and certain network-based colleagues had caused frustration or disillusionment. By contrast, organizational coherence within the multistate construct is enhanced when educators in a satellite region perceive their central office teammates to be "plugged in," when solid relationships afford regional administrators the latitude to exercise

autonomy, or when the interactions between central office and regional colleagues are rooted in "serious mutual respect."

To build and sustain trust within these adverse conditions, study participants described investing heavily in the development of strong interpersonal relationships. In classrooms, staff huddles, hallways, and board meetings, network leaders were observed interacting loosely and building rapport with stakeholders based in their satellite regions. Study participants remarked that this relationship-nurturing process—while laborious, unscalable, and potentially a contributing factor in the development of a counterproductive institutional insularity—has no viable substitute. Trust allows leaders to use finesse and discretion when wielding authority, confident that leading questions and arch observations will be more effective than pulling rank. Similarly, the trust equity that Winslow had amassed through investing in relationships with Perennial's regional board allowed them to avert catastrophe during the pandemic by working collaboratively to identify alternatives to a mandate that would accomplish the shared objective of increasing staff vaccination rates. Channing explained that multistate CMO leaders who fail to cultivate healthy relationships with key regional stakeholders may be oblivious to early warning indicators that would be impossible to miss at a campus in their backyard. In this respect, the structural strategy of preserving geographical compactness also supports the creation of trust insofar as it permits greater visibility and more frequent inter-regional interaction. In the words of one multistate network leader, stakeholders in satellite regions must "feel the love" from their central office colleagues.

High-Capacity Regional Administrators

Implicit in the concept of collaboration is a reciprocal commitment to pursuing a shared objective. As much as system leaders bear responsibility for taking proactive measures to involve

schools and regions in goal-setting and decision-making processes, coherence demands that stakeholders at other levels of an educational organization buy into—and champion—the network's vision. Marzano and Waters (2008) note that campus-based leaders who are less than fully on board with a district's approach may send tacit signals to teammates that it is permissible to pay lip service to network directives while functionally instituting home rule. This "contrived coherence" seldom leads to meaningfully improved outcomes for students, educators, or families (DuFour & Fullan, 2012, p. 31).

CMO executives who default to the "big man leadership" style that Williams (2015) defines as being rooted in dominance, prominence, and tribalizing are unlikely to develop the symbiotic partnership with regional administrators that makes multistate systems cohere. Strong regional leadership ensures that replication efforts are implemented energetically rather than in a perfunctory fashion (Hays, 2013). CMOs routinely send veteran educators steeped in a network's model and culture to seed replication efforts in new communities (Lake et al., 2010). Coherence-making efforts can be compromised by suspicions that regional administrators are beholden to the central office; high-performing educators in network-affiliated replication campuses who perceive their professional discretion to be unduly curtailed by inflexible centralized mandates expect regional administrators to give voice to local concerns (Torres, 2014). While CMOs frequently build structured internal development pipelines to mitigate replication challenges attributable to ineffective regional and campus-based leadership, the leaders of standalone charters often take part in self-directed training programs that must account for a broad range of competencies including those more typically associated with district superintendents than with building principals (Carpenter & Peak, 2013; Ni et al., 2015; Torres et al., 2018).

Participant responses revealed a deep appreciation for the central role that regional administrators play in the coherence-creation process. Network leaders attempted to enhance the functionality of their networks either by dispatching trusted team members to export their models to new settings or by tapping local leaders whose strengths complemented existing central office capacity. Two of the regional administrators participating in this study were internal transfers who could draw on both their familiarity with network practices and their relationships with network personnel when navigating internal unrest or solidifying external support. Cutler described taking proactive measures within Reservoir Academy's satellite region to counteract the perception that instructional materials scripted by "thought leaders" from the network's flagship region might be inapposite; Vaughn, who was "shipped out" from Perennial's flagship region according to the network's chief executive, instilled confidence in a major philanthropic supporter that the CMO could resume its growth efforts within the community. Two other networks leaned on regional administrators whose familiarity with the community offset their lack of prior charter school leadership experience. Rogers and Patrick—whose largely self-directed pre-service training programs more closely resembled those typically associated with standalone schools than with CMOs—promoted coherence within their respective networks by using their superior understanding of the local regulatory landscape, political environment, and stakeholder map to guide the translation of an existing model to a new setting.

Network leaders forestalled the creation of an ersatz, superficial coherence by empowering regional administrators to exercise the autonomy needed to secure their standing with local stakeholders. The majority of the regional administrators participating in this study suggested in interviews that they were singularly qualified to serve credibly as both external ambassador and internal proxy for their respective networks within their specific communities.

One regional administrator explained that local leaders are "revere[d]" in their community; others argued that they possessed unique skillsets that allowed them to act decisively or without explicit prior authorization where others would be gummed up in bureaucracy. As discussed, the process of creating coherence requires leaders to engage stakeholders throughout their organizations in goal-setting and decision-making processes. Therefore, regional administrators perceived as network apparatchiks stand not only to lose face with their constituents but also to impair the coherence-making process by depriving the central office of a bona fide partner with whom to engage in an authentic back-and-forth. CMO leaders appeared to recognize that the long-term viability of their organizational expansion efforts would be better served by ceding meaningful authority than by gratuitously flexing power. These leaders, secure in their standing, took affirmative measures to make themselves less indispensable, building measures of planned obsolescence into their business models or actively transitioning the locus of authority away from network headquarters and toward satellite regions. The presence of high-capacity regional administrators who can import a network model without sacrificing local credibility allows system leaders with the requisite humility to subordinate their egos for the betterment of their organizations to cultivate the collaborative cultures that coherence requires.

Implications

In this section, I discuss the implications of the study's findings on three distinct stakeholder groups. First, I explore how the public policymakers and private funders who have created conditions favorable to charter replication stand to benefit from a greater understanding of how multistate operators attempt to navigate the challenges that threaten to compromise network quality and sustainability. Second, I explain how charter networks either operating in more than one state or contemplating an imminent interstate expansion effort can work to

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mitigate the barriers to creating coherence within their organizations. And finally, I suggest that the leaders of traditional, geographically circumscribed school systems can strengthen their practice by observing how their peers inhabiting the multistate paradigm strive to transform operational constraints into opportunities for improvement.

Policymakers and Funders

Successful charter school operators confront pressure from both policymakers and private actors to replicate their models (Farrell et al., 2014; Wohlstetter et al., 2015). From a public policy standpoint, state actors have worked to facilitate replication by creating regulatory carve-outs and streamlined approval processes that privilege established models over unproven aspirants (603 Code Mass. Regs. 1.04(4), 2022; Ariz. Admin. Code R7-5-208(A), 2022; Cohodes et al., 2021; Idaho Code Ann. § 33-5205C(7), 2022; Mo. Ann. Stat. § 160.408, 2018; N.C. Gen. Stat. Ann. § 115C-218.3, 2020; Schwenkenberg & Vanderhoff, 2015). Policymakers have not only sought to accelerate the growth of models that have already demonstrated effectiveness within their communities. Rather, through legislation and regulation as well as via grant competitions, federal and state officials have created incentives for successful operators to cross state lines (DC Public Charter School Board, 2012; Del. Code Ann. tit. 14, § 511, 2020; Fla. Stat. § 1002.333, 2022; U.S. Department of Education, 2019). Private actors have augmented these bureaucratic efforts by providing philanthropic support and political cover for outside operators willing to commit to interstate expansion efforts (Barnum, 2017b, 2018; DeBray et al., 2014; Ferrare & Setari, 2017; Lake, 2007; Reckhow & Snyder, 2014; Scott & Jabbar, 2014, p. 247).

Evidence suggests that even the strongest charter operators struggle to translate their success from one setting to another (Farrell et al., 2014; Wohlstetter et al., 2011, 2015). Multistate networks have historically produced shakier student learning data than have their

more geographically compact peers, and networks whose replication campuses differ geographically and demographically from their existing portfolios occasionally encounter challenges that manifest in weaker academic performance outcomes (Feit et al., 2020; Woodworth & Raymond, 2013). With CMOs developing structured leadership development and support programs to ensure proliferation of common policies and practices (Gleason, 2017; Torres et al., 2018), they may be less attentive to the potential impact of geographic dispersion or to the importance of community outreach on the success of replication campuses (Lake et al., 2010; National Alliance for Public Charter Schools, 2016a). As a result, communities that have invested heavily in the importation of models established in other states have experienced uneven results (Louisiana Department of Education, 2019; Lussier, 2015, 2023).

This study's findings offer a roadmap for policymakers and funders engaging with charter networks contemplating interstate replication efforts. While the findings indicate that there is no one correct way for network leaders to create system-wide coherence, they outline how these leaders work in a dynamic fashion to cultivate institutional alignment, shared mindsets, and commonality of purpose in the pursuit of organizational goals. Because coherence-making is an iterative process, oversight agencies and funders should consider engaging in both pre-opening and ongoing dialogue with operators regarding the challenges they are encountering and coherence-making strategies they have deployed and reworked in response. Prior to approving a replication application, authorizers should explicitly ask operators how they anticipate divergent regulatory, funding, and cultural environments posing challenges for their replication efforts. This exercise should theoretically force operators to identify and wrestle with some of the impediments to organizational coherence that exist within the multistate paradigm well before they begin to operationalize a new region. From a regulatory standpoint, out-of-state

operators should be asked to describe how educator licensure requirements will impact their staffing models, how differences in state standards and year-end assessment systems will affect their curricular models, how responsibility for identifying and educating students with disabilities will impact their student support model, and how differences in state disciplinary codes will shape their approach to school culture.

With respect to funding, operators should not only have to provide a five-year budget model and an accompanying narrative but should be asked to explain how they anticipate differences in educational funding environments will determine the manner in which they can deliver the full range of mission-aligned programming they have developed elsewhere. Policymakers would also be well-advised to inquire about how operators perceive the community expectations within their proposed replication regions to differ from those in their flagship settings. The inclusion of this prompt should impress upon leaders the importance of engaging in extensive and authentic outreach in order to ascertain how the mores of a community and its aspirations for the education of its children comport with the network's vision. This set of prompts can easily be adapted by funders who are contemplating whether to provide philanthropic backing to an interstate-curious operator.

After having network leaders enumerate the challenges they expect to encounter in a satellite region, policymakers and funders should ask these leaders to explain how they intend to develop and deploy the ideological, structural, and interpersonal strategies for creating coherence highlighted in this study. That is, operators should be asked to describe their approaches to fostering a sense of oneness, to involving regional stakeholders in goal-setting and decision-making processes, and to erecting functional communication mechanisms. Operators should describe the role that geographic proximity has played in their network design and outline their

plans for iterating their staffing and governance models to strike an appropriate balance between efficiency and local autonomy. Policymakers and funders should also ask network leaders to describe how they will source and train regional administrators and how they will assess whether those individuals are maintaining internal credibility while serving as faithful stewards of their organizations' missions.

During interim accountability cycles (e.g., when charter schools complete annual reports for their oversight bodies or when they submit grant reports to funders), operators should describe how these efforts have evolved during the reporting period. In recognition of the dynamism inherent in the coherence-making process, operators should reflect on what assumptions proved unfounded, what unanticipated challenges arose, and what lessons were learned based on the interstate expansion effort (perhaps due to a model adaptation that originated in the satellite region and is now being leveraged for the benefit of students and educators elsewhere). Leaders should narrate how their approach to deploying the specific ideological, structural, and interpersonal strategies outlined in this study have evolved and whether they anticipate making any material changes during the upcoming reporting cycle. These inquiries would not be used for high-stakes accountability purposes (i.e., to determine whether a charter is non-renewed or revoked) but rather to ensure that networks operating on an interstate basis are grappling with how to address the issues most likely to result in an unsuccessful expansion initiative.

Charter Networks

This study's findings offer insight into how the individuals confronted with the daunting challenges inherent in running multistate charter networks can improve their practice. While the results of interstate charter replication efforts have been mixed, a powerful combination of

internal forces and environmental conditions continues to drive CMOs to scale up their operations. According to a 2016–2017 census published by National Alliance for Public Charter Schools, 30 CMOs operated campuses in more than one state (David, 2019). Nearly 320,000 students—or 11% of the roughly 3 million students enrolled in charters nationwide—attended a school affiliated with a multistate network (David, 2019). Moreover, a 2015 survey of CMO leaders administered by the National Alliance for Public Charter Schools indicated that nearly half had "existing plans to expand to a new state," while nearly 80% of respondents evinced a willingness to expand to a new state within a 10-year timeframe (National Alliance for Public Charter Schools, 2016a). Accordingly, by drawing attention to the discrete challenges faced by this unique subset of educational leaders, by pointing out some of the more common pitfalls to which they are vulnerable, and by highlighting some of the ways in which these leaders are creating coherence within their organizations, this study provides a resource for existing and aspiring leaders whose organizations are being incentivized to expand in certain ways.

Network executives and the boards to which they report can draw on the findings in this study to prepare for the challenges they are likely to encounter in the multistate arena, to understand the levers they can pull to create greater institutional coherence, and to observe how leaders are able to thrive within this complex milieu. Organizations often fall victim to the Rumsfeldian "unknown unknowns," the circumstances they do not expect to encounter and for which they are wholly unprepared. Winslow alluded to these risks when recalling about Perennial's expansion into a satellite region that the network was faced with "nuances we didn't know, and they were really complex, and we were having to scramble and figure out how you integrate it all into the systems we have, or not, and how does it all work?" The fact that an individual organization is unaware of a potential risk, however, does not mean that risk is

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objectively unforeseeable. By providing a broad overview of the unique leadership challenges inherent in the multistate paradigm, this study should alert network executives and trustees to potential stumbling blocks in a way that at least transforms the "unknown unknowns" into more navigable "known unknowns."

Moreover, by synthesizing the strategies that multistate leaders have used to create the shared mindsets and unity of purpose that characterize coherent educational organizations, this study provides a toolkit for networks aiming to build their capacity to maintain quality at scale. Network leaders reading this study should emerge with ideas for how to develop and deploy a range of ideological, structural, and interpersonal strategies to create coherence within their organizations. The heterogeneous nature of the study sample and the resultant range of approaches described by participants should permit leaders from different types of networks (e.g., both those with niche models more conducive to breadth than to penetration within a single community and those with models designed to support more significant numbers of students within satellite regions) to see how they might strive to create a sense of oneness, to iterate staffing models, and to design thoughtful communication and decision-making processes in a way that feels both feasible and authentic for them. Of particular salience to all network leaders should be the universal appreciation for the importance of relationships; all current and prospective multistate leaders reviewing this study should come away with a healthy fear of short-changing the relationship-cultivation process. In light of one leader's declaration that the relationship-building process cannot be confined to the holy trinity of "Zoom, text, email," networks should be prepared to allocate the time and resources necessary for frequent in-person collaboration.

The composite profile of the successful multistate leader sketched in Chapter 4 should also provide a template for executives attempting to understand how others cast in similar roles have attempted to comport themselves. By taking a cue from the network executives participating in this study, leaders will resist the impulse to engage in wanton displays of authority simply for the fleeting satisfaction of demonstrating who is in charge. By coming to appreciate the centrality of high-capacity regional administrators to sustained organizational functionality, leaders will strive to ensure that those individuals have sufficient autonomy to be viewed as credible by their constituents while remaining committed to the shared moral imperative that glues the network together. Moreover, by viewing the actions of study participants through the prism of the literature on both charter replication and organizational coherence, leaders should internalize the importance of investing in local decision-making, committing to dynamic and ongoing reassessments of staffing and governance structures, and collaborating in purposeful ways that foster the development of trust.

The findings also suggest an important role for the governing bodies of multistate CMOs (i.e., the boards of directors of the nonprofit organizations that employ these network executives). As noted in Chapter 2, CMOs frequently develop structured leadership development programs to ensure steady pipelines of mission-aligned regional and campus administrators and to control for potential variability in quality across schools (Torres et al., 2018). These programs appear infrequently to include dedicated strands for CMO leaders, depriving network executives of access to the very in-house training programs that separate their organizations from standalone schools. To ensure their chief executives have access to the types of development opportunities that enhance their ability to lead an organization committed to operating within the multistate construct, board members could use the findings in this study to create a template for assessing

areas of strength and areas for potential growth. From there, board members and network leaders could work together to find relevant training opportunities, whether through direct coaching, cohort-based fellowships, or informal mentoring programs.

Leaders of Traditional Public School Districts

A third group of stakeholders for whom the findings from this study have relevance are the leaders of traditional public school districts. The leaders of multistate networks, by virtue of having to adapt certain programmatic elements to suit the jurisdictional demands of different operating environments, are routinely and systematically forced to run experiments and to assess the relative efficacy of various approaches. As such, these leaders are supremely well-positioned to serve as "learning organizations," i.e., places "where people are continually discovering how they create their reality" and are "continually expanding [their] capacity to create [their] future" (Senge, 2013, pp. 12–13). Replication, when pursued with intentionality, promotes the dynamism central to the coherence-making process as stakeholders based both in the central office and in a satellite region engage in an ongoing dialogue that builds their "collective dynamic capabilities" (Peurach & Glazer, 2012, p. 181). Accordingly, to the extent that these leaders are adept at identifying what is working well in one location and spreading that practice to other settings, the multistate construct can serve as an accelerant for internal continuous improvement efforts.

The implications of these findings are not rooted in a presumption that traditional public school systems are bastions of harmony. Each LEA comprises a range of household income levels, political orientations, and value systems. Nevertheless, while the leaders of traditional districts are expected to reconcile the expectations of stakeholders whose views on what their schools should be promoting and how they should be teaching run the gamut, they are insulated

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from the brunt of the regulatory and financial incongruities that afflict their peers leading

multistate systems. While the leaders of traditional school systems are seldom placed in the

position of having to run pilots based on one or more of their schools being subject to a different

set of laws and regulations, they can draw lessons from the manner in which this study's

participants are compelled to view each directly operated region as a functional lab of

experimentation. Conditioned to hunt for opportunities to improve network operations, these

leaders are consistently experimenting, evaluating, and adapting based on the environmental

realities at least one of their regions is encountering. To the extent that some novel design

element initially compelled by regional circumstances is seen as having a positive impact on

students, it can be used to inform programming at other sites. Multistate leaders, then, must be

wired to developments within their regions and schools and committed to a recursive process of

information gathering, analysis, and dissemination. From a coherence-making standpoint, the

leaders of traditional school systems should be able to derive inspiration from the manner in

which their counterparts in the multistate universe seek not only to direct and align but also to

learn and evolve.

Recommendations for Future Research

Finally, I offer three recommendations for future research. These recommendations build

upon the design and findings of this study and highlight opportunities for researchers to

contribute both to greater understanding of this unique class within the broader field of

educational leadership and to improvements in practice that can have meaningful benefits for

students, families, and educators.

First, researchers could use either a mixed-methods or a purely quantitative approach to

assess the efficacy of these coherence-making efforts on key outcome measures. The qualitative

case study methodology used in this study aimed to center the perspectives of the stakeholders charged with navigating the assorted challenges that can impair an organization's efforts to operate effectively in more than one state. Researchers could augment these perceptual data and build on earlier studies by Peltason and Raymond (2013), Woodworth and Raymond (2013), and Torres (2014, 2016a, 2016b, 2016c) by attempting to explore the impact of interstate replication efforts on learning outcomes (e.g., proficiency and growth on criterion-referenced or nationally normed assessments), teacher retention and student re-enrollment rates, and parent satisfaction. As suggested by Peltason and Raymond (2013), Farrell et al., (2014), Wohlstetter et al. (2011, 2015), and Feit et al. (2020), these researchers could explore not only the extent to which campuses in satellite regions are rivaling or surpassing the quality of those in the networks' flagship regions but also the impact of interstate growth on the caliber of extant flagship region schools. Quantitative comparisons could explore both internal variability in performance on key metrics (to assess whether programmatic quality is being sustained across a network's portfolio) as well as external comparisons to demographically similar schools in the networks' regions (to assess whether these schools are offering parents strong, tuition-free alternatives within their communities).

Second, researchers could design a study that incorporates more extensive perceptual data from students, families, and educators. As noted, this study deliberately elevated the perspectives of the central office and regional administrators responsible for attempting to cultivate institutional alignment, shared mindsets, and commonality of purpose in the pursuit of organizational goals. As the ultimate objective is for these leaders to facilitate the creation of educational environments conducive to teaching and learning and responsive to the needs of their communities, a follow-up study could explore the extent to which these stakeholders perceive

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campuses affiliated with multistate networks to be effective on these measures. Using interviews, focus groups, and surveys to elicit the perspectives of these constituencies, researchers could build on research from Lake et al. (2010), Wilson (2016), Torres (2014), and Horsford et al. (2018) that calls into question whether CMOs are sufficiently committed to incorporating local stakeholder voice into the operation of replication campuses in satellite regions. This research would address the degree to which (a) multistate networks are authentically committed to shared decision-making, and (b) the educators, parents, and students at campuses affiliated with multisite CMOs feel as though their input is both solicited and ultimately incorporated into policy and practice.

Third, this area of exploration appears ripe for a more intersectional analysis that interrogates race, ethnicity, gender, and other markers of privilege. Both Glazer et al. (2019) and Wilson (2016) observed that racial dynamics have occasionally shaped the reception CMOs receive in expansion settings. One regional administrator interviewed for this study explicitly surfaced this sentiment when explaining how colleagues from the central office were perceived in the satellite community. Additional research could examine the manner in which the racial, ethnic, and gender identities of multistate CMO leaders impact their access to philanthropic growth capital, their political embrace in expansion settings, their relationships with board members, and their ability to be deferential without fearing insubordination. More broadly, researchers could use a critical theoretical lens to explore the coherence-making process within the multistate paradigm in order to assess the relevance of power and privilege on an organization's ability to navigate regulatory differences, cultural divides, and internal unrest.

Conclusion

This study set out to explore the manner in which leaders of multistate charter networks navigate the disparate policy landscapes, operational conditions, and stakeholder expectations that characterize the communities in which their schools are located. Analysis of the data collected through interviews, observations, and document review revealed that these leaders have developed and deployed sets of ideological, structural, and interpersonal strategies in an effort to create organizational coherence within their geographically non-contiguous school systems. Examined through a conceptual framework that ties together the literature on coherence in educational organizations and charter replication, findings from this study demonstrate how multistate leaders engage stakeholders based in their satellite regions in a dynamic process of calibrating the appropriate fit between network model and local conditions.

Implications from this study are relevant to the policymakers and funders who have continued to provide regulatory and financial support to operators undertaking interstate expansion efforts, to the current and prospective leaders of multistate CMOs who are being entrusted to create high-quality learning environments for students in far-flung communities, and to the superintendents of traditional public school districts who can draw lessons from the manner in which this study's participants are consistently experimenting, evaluating, and adapting.

This study addresses a gap in the literature by contributing to our understanding of how educational leaders confronted with the daunting challenge of running multistate school systems attempt to create coherence within their organizations. With the public policy and private philanthropic incentive structures continuing to tilt in favor of replication, and with multistate operators generally struggling to match the success of their more geographically compact peers,

it is imperative that leaders of these unique organizations understand how to meet the needs of their communities while simultaneously cultivating the sense of collective mission that promotes effective operation. Accordingly, further research would be warranted to quantify the impact of these coherence-making efforts on key outcome measures; to explore the perceptions of students, families, and educators affiliated with CMO schools in satellite regions; and to interrogate the role that race, ethnicity, gender, and other markers of privilege play within the multistate leadership construct.

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Appendix A: Informed Consent

Protocol Title: Bringing Coherence to Multistate Charter Leadership: A Collective Case Study
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INTRODUCTION You are invited to participate in this research study called "Bringing Coherence to Multistate Charter Leadership: A Collective Case Study." You may qualify to take part in this research study because you occupy a leadership position at the central office, regional, or campus level for a multistate charter network. Approximately eight people will participate in this study and it will take 2–5 hours of your time to complete over the course of one day.

WHY IS THIS STUDY BEING DONE? This study is being done to explore the manner in which the leaders of multistate charter networks navigate the disparate policy landscapes, operational conditions, and stakeholder expectations that characterize the communities in which their schools are located.

WHAT WILL I BE ASKED TO DO IF I AGREE TO TAKE PART IN THIS STUDY? If you decide to participate, the primary researcher will individually interview you and, if practicable, observe you during the course of a school day. If the implementation of COVID-19 health and safety protocols preclude in-person interviews and observations, interviews will take place virtually, and the primary researcher may observe virtual meetings.

During the individual interview you will be asked to discuss your experience as an educational leader and the unique challenges that accompany leadership within a school system whose campuses are not geographically circumscribed. The interviewer will transcribe notes during the conversation. You will be referred to exclusively by your title (e.g., "a CMO leader") in order to keep your identity confidential. Interviews will be scheduled around your availability in order to minimize disruptions to your work day.

The primary researcher may also send an interview after the initial interview with a written list of follow-up questions and/or request a follow-up interview, which would be conducted virtually.

WHAT POSSIBLE RISKS OR DISCOMFORTS CAN I EXPECT FROM TAKING PART IN THIS STUDY? The possible risk or discomfort of the study is minimal. It may involve fatigue after answering the questions if you have a busy schedule.

Due to the evolving nature of the COVID-19 pandemic, there are inherent risks with in-person research. The researcher has put the following precautions in place to support participants.

- **RISK**: Person-to-person exposure is the most frequent route of transmission for infectious viruses and occurs via direct inhalation of respiratory droplets during close contact.
    - o Infectious diseases are transmitted from person to person by direct or indirect contact. Certain types of viruses, bacteria, parasites, and fungi can all cause infectious disease.
    - o If you have flu-like symptoms (e.g., fever, cough, etc.) please reschedule any in-person meetings.
    - o If you experience flu-like symptoms (e.g., fever, cough, etc.) during the study activity, please immediately alert the researcher. The researcher will then stop all study activities. The researcher may provide you with information on where to get a COVID-19 test, or other safety and health information.

- **WAYS TO MITIGATE RISK:** Social distance, wear face covering
    - o Simple preventative measures, such as frequent hand washing, wearing a face covering, maintaining social distance, disinfecting the workspace can cut down on disease transmission.

- **(LIMITED) MANDATED REPORTING:** When required by law, information (including individually identifiable information) related to a research subject's COVID-19 tests results may be reported to a public health authority.
    - o If you find out you have tested positive for COVID-19 and recently participated in a research study, please contact the researcher at your earliest convenience. If applicable, your name and contact information may be shared with the Environmental Health and Safety Office (EHS) to initiate viral contact tracing. The researcher will not share your research data with anyone outside of the research team.
    - o When communicating with anyone other than the IRB or the researcher about your symptoms or your concerns about a potential viral spread, you DO NOT have to disclose the study title or topic. The researchers will only share your name and contact information, if appropriate for viral contact tracing.
    - o The researcher will keep you, the research participant, updated on any next steps as they become available.

WHAT POSSIBLE BENEFITS CAN I EXPECT FROM TAKING PART IN THIS STUDY? There is no direct benefit to you for participating in this study. Participation may benefit the field of educational leadership by supporting the development of a better understanding of the extent to which geographically disparate school systems are able to maintain community responsiveness and internal connectedness.

WILL I BE PAID FOR BEING IN THIS STUDY? You will not be paid to participate. There are no costs to you for taking part in this study.

WHEN IS THE STUDY OVER? CAN I LEAVE THE STUDY BEFORE IT ENDS? The study is over when you have completed the individual interview and the researcher has completed his observations. However, you can leave the study at any time even if you or the researcher have not finished.

PROTECTION OF YOUR CONFIDENTIALITY. The primary researcher is taking precautions to keep your information confidential and prevent anyone from discovering or guessing your identity, such as using a pseudonym instead of your name, by obscuring the identity of the organization through use of general terms (e.g., "mid-sized network") as opposed to specifically identifiable information, and by keeping all information on a password protected computer and locked in a file drawer.

For quality assurance, the study team, the study sponsor (grant agency), and/or members of the Teachers College Institutional Review Board (IRB) may review the data collected from you as part of this study. Otherwise, all information obtained from your participation in this study will be held strictly confidential and will be disclosed only with your permission or as required by U.S. or State law.

HOW WILL THE RESULTS BE USED? This study is being conducted as part of the dissertation of the primary researcher. Your identity will be removed from any data you provide before publication or use for educational purposes. Your name or any identifying information about you will not be published.

WHO MAY VIEW MY PARTICIPATION IN THIS STUDY

___I consent to allow written materials viewed at an educational setting or at a conference outside of Teachers College, Columbia University

_____
                                                    Signature

___I **do not** consent to allow written materials viewed outside of Teachers College, Columbia University

_____
                                                    Signature

WHO CAN ANSWER MY QUESTIONS ABOUT THIS STUDY? If you have any questions about taking part in this research study, you should contact the primary researcher, Benjamin Feit, at 917-364-2103 or at bnf2106@tc.columbia.edu. You can also contact the faculty advisor, Dr. Jeffrey Young, at jmy2125@tc.columbia.edu.

If you have questions or concerns about your rights as a research subject, you should contact the Institutional Review Board (IRB) (the human research ethics committee) at 212-678-4105 or email IRB@tc.edu or you can write to the IRB at Teachers College, Columbia University, 525 W. 120th Street, New York, NY 10027, Box 151. The IRB is the committee that oversees human research protection for Teachers College, Columbia University.

PARTICIPANT'S RIGHTS

- I have read the Informed Consent Form and have been offered the opportunity to discuss the form with the researcher.
- I have had ample opportunity to ask questions about the purposes, procedures, risks and benefits regarding this research study.
- I understand that my participation is voluntary. I may refuse to participate or withdraw participation at any time without penalty.
- The researcher may withdraw me from the research at the researcher's professional discretion.
- If, during the course of the study, significant new information that has been developed becomes available which may relate to my willingness to continue my participation, the researcher will provide this information to me.
- Any information derived from the research study that personally identifies me will not be voluntarily released or disclosed without my separate consent, except as specifically required by law.
- Your data will not be used in further research studies.
- I should receive a copy of the Informed Consent Form document.

My signature means that I agree to participate in this study:

Print name: _____ **Date**: _____

Signature: _____

Appendix B: Semi-Structured Interview Guide (Network Executive)

This interview guide outlines the topics that my semi-structured interviews with the chief executives of multistate charter networks will cover. The guide also contains sets of sample questions that may be used or adapted in order to explore the interview's overarching topics. While interviews with network executives will cover the same range of topics, the precise phrasing and sequence of the questions will vary. In the event that a research subject raises an unexpected topic, the researcher may elect to explore that topic in the moment and will exercise discretion with respect to the inclusion of that topic in subsequent interviews.

Topic 1: Background

Sample Questions

1. Could you please talk a little bit about your experience in education and within this charter network? (probe: prior experience as a teacher or school leader, years within the network, responsibilities)

2. What training did you receive prior to assuming a leadership role within this organization? Was the training provided directly by your organization (either through an internal preparation program or through a partnership with a third-party provider) or was your preparation more self-directed?

3. To what extent do you believe that your training effectively prepared you for the challenges you have faced in this role?

Topic 2: Replication Planning and Early-Phase Implementation

Sample Questions

4. How would you describe your network's mission and model?

5. What was the initial impetus for your network to scale? (probe: was the motivation strictly mission-related? Were there financial imperatives? Pressure from funders or policymakers?)

6. How has the network determined (a) whether to add new campuses, (b) where to site the campuses, and (c) what grade levels would be served?

7. How does the network determine (a) whether it has the internal capacity to support newly opened campuses, and (b) whether parental demand for seats will exist at a new campus? What else do you take into account when considering whether to expand?

8. Describe the circumstances under which the network decided to open a campus in [State B]. Whose input was sought (prompt: consider both internal and external stakeholders)? How would you describe the reception you received from local stakeholders (probe: was there a meaningful difference in the manner you were received by parents/educators/business leaders/politicians?)

9. What supports did the network provide to the replication campus during the planning process? (prompt: staff/student recruitment, facilities identification and preparation, procurement of supplies/materials/technology)?

10. How were administrators for the replication campus identified and trained? What were the most important selection criteria (probe: familiarity with the community? Familiarity with the network model? Experience as an administrator?)

11. How were teachers identified and prepared? Did any teacher or administrator from existing network campuses move into the new state?

12. How were families recruited / curriculum created / student policies (e.g., uniform policy, promotional criteria, code of conduct, etc.) established?

Topic 3: Multistate Context

Sample Questions

13. To what extent do you believe the network's original model (i.e., the one being replicated) is well-suited to meet the needs of the students, families, and educators in [State B]?

14. Describe your understanding of how the operational environment (e.g., funding, political backing, regulatory frameworks, etc.) in State A compares to the environment in State B.

15. To what extent did you anticipate having to adapt your model in response to differences in the operating environment?

16. Did you encounter any challenges unique to State B that you did not anticipate? How did you respond to them when they arose? What were your key takeaways?

17. What do you look for when assessing whether your model has been successfully adapted in a new state? (probe: visible indicia on school visits? Academic/cultural data? Surveys? Student re-enrollment?)

Topic 4: Coherence

Sample Questions

18. How would you describe the relationship between the central office and the campus in State B?

19. How does the central office communicate with campus-based stakeholders in State B? What type of feedback loops exist for the central office to become aware of campus-level priorities (and for the campus to become aware of network-level priorities)?

20. What is your approach to developing network-wide and campus-specific goals? (probe: to what extent do campus leaders collaborate on the development of these goals? Are these priorities shared at the network and campus levels?)

20. To what extent, and in what areas, does the campus in State B possess autonomy (prompt: curriculum, policy setting, recruitment strategies, etc.)?

21. How do you attempt to reconcile campus-level autonomy and system-level standardization? How does the network ensure that the campus is pursuing network-level priorities with fidelity?

22. How would you describe your approach to creating a cohesive network culture (prompt: common language? common curriculum/assessments? Shared rituals?)

23. To what extent do you encounter challenges in attempting to create cohesion between your various locations? How do you attempt to overcome them?

24. How do you attempt to ensure that the campus in State B is set up to approximate the success of your campuses in State A in a sustainable fashion?

Appendix C: Semi-Structured Interview Guide (Regional Admins)

This interview guide outlines the topics that my semi-structured interviews with regional leaders affiliated with multistate charter networks will cover. The guide also contains sets of sample questions that may be used or adapted in order to explore the interview's overarching topics. While interviews with regional leaders will cover the same range of topics, the precise phrasing and sequence of the questions will vary. In the event that a research subject raises an unexpected topic, the researcher may elect to explore that topic in the moment and will exercise discretion with respect to the inclusion of that topic in subsequent interviews.

Topic 1: Background

Sample Questions

1. Could you please talk a little bit about your experience in education and within this charter network? (probe: prior experience as a teacher or school leader, years within the network, responsibilities)

2. What training did you receive prior to assuming a leadership role within this organization? Was the training provided directly by your organization (either through an internal preparation program or through a partnership with a third-party provider) or was your preparation more self-directed?

3. How are/were administrators for your region identified and trained? What were the most important selection criteria (probe: familiarity with the community? Familiarity with the network model? Experience as an administrator?) Has that process changed since the founding leader was appointed/trained?

4. To what extent do you believe that your training effectively prepared you for the challenges you have faced in this role?

Topic 2: Multistate Context

Sample Questions

5. How would you describe your network's mission and model? To what extent do the school(s) in the satellite region in which you are located share the same mission and model as the school(s) in the network's home region?

6. Describe the circumstances under which the network decided to open a campus in your state. Whose input was sought (prompt: consider both internal and external stakeholders)? How would you describe the reception you received from local stakeholders (probe: was there a meaningful difference in the manner you were received by parents/educators/business leaders/politicians?)

7. To what extent has the relationship between the school and those key internal and external stakeholders evolved over time?

8. What supports did the network provide to your region during the pre-opening process? (prompt: staff/student recruitment, facilities identification and preparation, procurement of supplies/materials/technology)? Did any of those responsibilities shift over to the regional/school level when the school became operational?

9. Who is responsible for "holding" the relationships with stakeholders in your region – network leadership or local leadership? How are those relationships managed? (probe: board of directors, authorizers, elected officials, funders, etc.)

10. How were teachers identified and prepared? Did any teacher or administrator from existing network campuses move into the new state?

11. How were families recruited / curriculum created / student policies (e.g., uniform policy, promotional criteria, code of conduct, etc.) established?

12. To what extent do you believe the network's original model (i.e., the one being replicated) is well-suited to meet the needs of the students, families, and educators in your state?

13. Describe your understanding of how the operational environment (e.g., funding, political backing, regulatory frameworks, etc.) in State A compares to the environment in State B.

14. To what extent did you anticipate having to adapt your model in response to differences in the operating environment?

15. Did you encounter any challenges unique to State B that you did not anticipate? How did you respond to them when they arose? What were your key takeaways?

16. How much of the language that you use when recruiting families and teachers comes from your experiences in your region and how much is drawing on the brand/model from the central office?

Topic 3: Coherence

Sample Questions

17. How would you describe the relationship between the central office and your region/school? How do teachers and school staff view the central office? (probe: do they perceive the central office to have credibility with respect to the challenges they face, or do they perceive the central office to be detached and disconnected? Does it vary by department? What are they basing that determination on?)

18. How does the central office communicate with campus-based stakeholders in State B? What type of feedback loops exist for the central office to become aware of campus-level priorities (and for the campus to become aware of network-level priorities)?

19. To what extent are you involved in the development of network-wide goals? Regional/school goals? Are these priorities shared at the network and regional/campus levels?

20. To what extent, and in what areas, does the campus in State B possess autonomy (prompt: curriculum, policy setting, recruitment strategies, etc.)? Stated alternatively, what is your understanding of what is "core" to the network's model (and therefore not susceptible to adaptation) and what is peripheral (and therefore subject to regional customization)?

21. How does the network attempt to ensure that your region is pursuing network-level priorities with fidelity?

22. How would you describe the network's approach to creating a cohesive culture across schools and regions (prompt: common language? common curriculum/assessments? Shared rituals?) Have you developed your own unique school culture (rituals, etc.) independent of the network? (probe: how so? Have those efforts been embraced or perceived as threatening?)

23. To what extent do you encounter challenges in attempting to create cohesion between your region and the central office? How do you attempt to overcome them?

24. What data do you look at in order to determine whether you're implementing the network's model with sufficient fidelity?