



Governance & Community Engagement

Paul Morrissey, Compass Rose Public Schools

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Introduction

Who Am I?



- Founder & CEO of Compass Rose Public Schools
- Sixteen years in education: English teacher, college counselor, assistant principal, principal, network growth, etc.
- Originally from Massachusetts but have been in TX for almost ten years
- Building Excellent Schools Fellow in 2015
- Husband to Nicole and father to three little Texans: Harlan (6), Noa (4), and Sawyer (18 mo.)
- Favorite Food:
 - What I tell people when I want to sound classy – **Sushi**
 - But in real life – **Cheeseburgers**

The Compass Rose Story



- Generation 21 Charter School
- Opened in August 2017 with 90 students grades 6-7 and nine staff
- 350 students in March 2020
- ~4,000 PK-12 students and 400+ staff across eight campuses in San Antonio and the greater Austin area
- Campuses in San Antonio, Windcrest, Manor, & Bastrop
- ~\$50M annual operating budget in 2023-24 (*matters for board discussion*)
- Graduated our first class this past May



Governance

So, you want to build a strong board...

Three essential domains to keep in mind:

REPRESENTATION

- Reflective of community demographics
- Diverse in all areas: race/ethnicity, sex/gender, age/experience, etc.
- Demonstrated commitment to target community (not just city)

EXPERTISE

- Must be up to task of governing a school
- Finance, real estate, non-profit mgt., law, education, fundraising, etc.
- Executives must be reflective about their own gaps & limitations

INVESTMENT

- The Three T's: Time, Talent, & Treasure
- Needs are different at various stages of org growth
- In startup, you likely want on-the-ground support, not benefactors or oversight from afar

Tricks of the Trade: Prospecting

- **LinkedIn Premium...** it's worth the price if you use it strategically
 - You should plan to spend a LOT of time sending targeted messages to prospects
- **40 Under 40 and other professional recognition lists**
 - These are people who have made an impact in their community and are often interested in volunteering
- **Your personal and professional network**
 - Get in front of those “high-level connectors” you know! You probably have more board-worthy candidates in your extended network than you think. (Just don't rely on friends to populate the board... see “Dos and Don'ts” later in this deck.)
- **Local events connecting non-profits with interested prospects**
 - Not necessarily available in every location, but take advantage of the opportunities if you have them in your city
- **Have your elevator pitch ready**
 - Make sure you have a compelling version for face-to-face interactions and for email/In-mail. You only get one shot to sell people on your vision!
- **Spreadsheets are your friend!**
 - Track your outreach to prospects; come back to compelling folks a few times

Three Phases of a Charter School Board



**START-UP OR
FOUNDING BOARD**

**ADOLESCENT OR
GROWTH BOARD**

**STEWARDSHIP
BOARD**

Three Phases of a Charter School Board

FOUNDING

- This is the team who will help you get the school off the ground
- They will co-write, review, and edit your application, help you build the financial model, scout property with you, block-walk to get the word out among the community, etc.
- They will oversee the early days of operation, ensuring you remain true to the vision you set in your application.
- They set the vision for excellence with you.
- Could include a healthy mix of community-centered leaders and career climbers

GROWTH

- This is the phase of the board where they become more technical advisors and supporters.
- They lend their professional skills to areas where the org lacks expertise.
- They are typically not showing up to every community event, but they are your trusted advisors when you face unexpected challenges.
- They help set and reset the vision for excellence.
- Usually includes professionals who have grown into leadership roles (chiefs, VPs, etc.).

STEWARDSHIP

- This is where the board's role moves to stewardship of the mission, which includes a heavier emphasis on fundraising
- This board connects you with community and business leaders who can help you advance the mission of the organization through targeted support (philanthropic or technical).
- Often the organization becomes their primary way to "give back"
- This board may not work the cash register at the school bake sale, but they will help ensure the coffers are full.

Beware the Pitfalls!

Common missteps to avoid when building a charter board:

REPRESENTATION

Mistaking investment in the city (or state) for investment in the neighborhood or community. Every board should have at least one member who is deeply and demonstrably committed to the target community.

EXPERTISE

Populating the board with too many educators and not enough finance experts. Educators are necessary but serve a very specific purpose; you can never have enough finance expertise on the fiduciary board.

INVESTMENT

Mismatching board investment and growth of the org. A startup board that is not willing to roll up their sleeves to do work and a stewardship board that is not capable of doing any more than that are equally challenging.

The Biggest Board Conundrum



In startup, your board will feel like the **MOST IMPORTANT** stakeholders because they are the only “team” you have. But then when the time comes for you to launch the school, you will have a staff and volunteers and students and families to manage, and the board will suddenly feel like the **LEAST IMPORTANT** stakeholders.

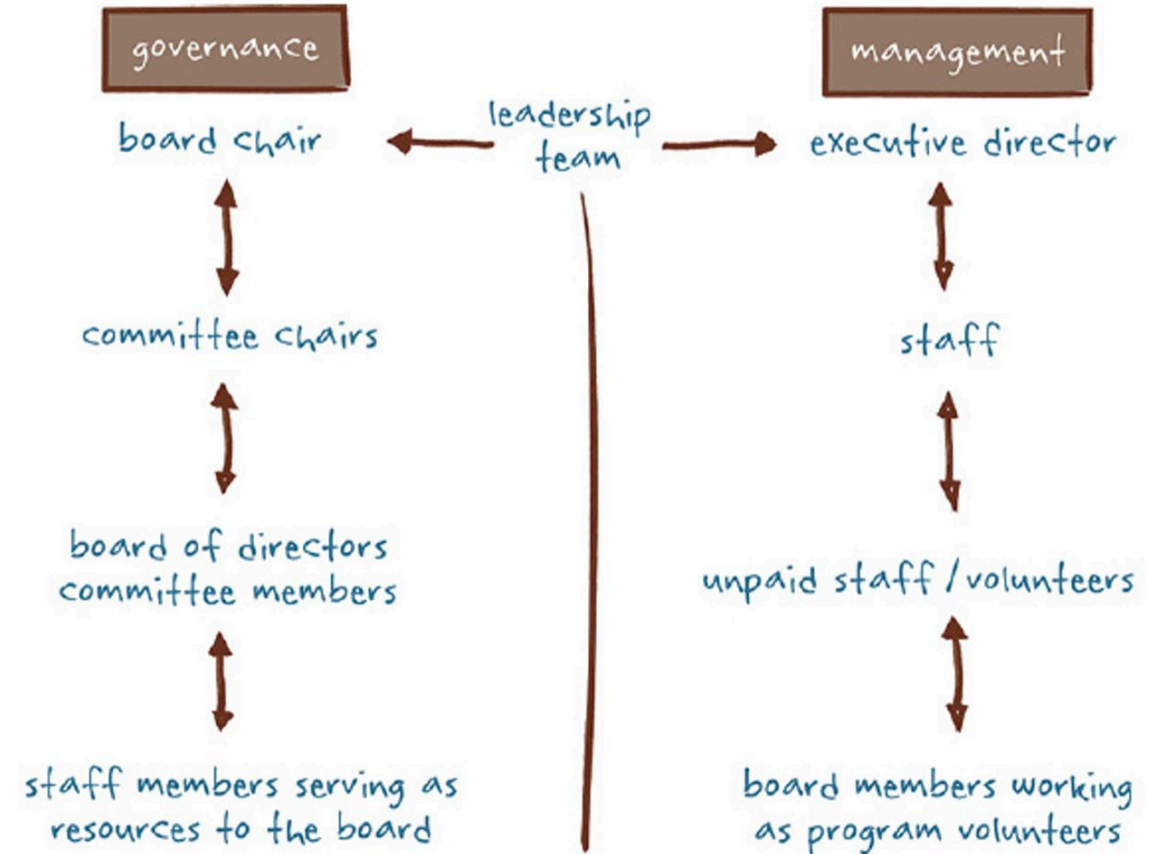
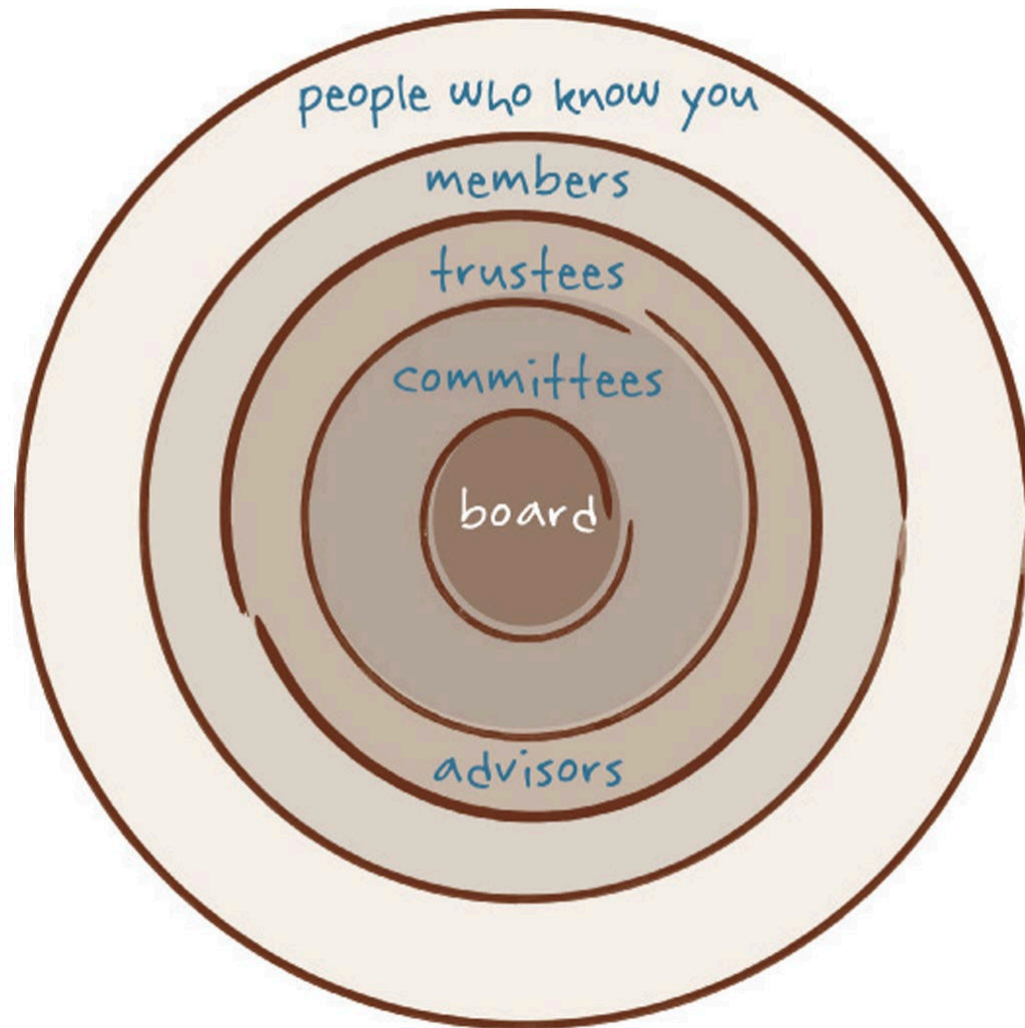
The right position for them to occupy is somewhere in between those two poles.

Some “Dos and Don’ts”

- **Do** learn “Robert’s Rules of Order” and TOMA inside and out...you will set and hold that bar for a while
- **Don’t** try to populate the board with friends of yours or friends of other board members...too many conflicts, and it will lead to unnecessary friction
- **Do** respect the fact that it is a volunteer board, and your Directors are gifting you their free time. But...
- **Don’t** be afraid to put them to work and hold them accountable (clear expectations/deadlines!)
- **Do** try to avoid adding people to the board who see it as an opportunity to “flex their leadership muscles”
- **Don’t** think board development and growth ends when your application is approved; it’s an all-the-time thing



How the Board Comes Together & How it Functions



Putting my money where my mouth is...

Our Board of Directors



Claudia Hernandez, Chair
Attorney
*DeMott, McChesney, Cutright,
Armendariz, LLP*



Kurtis Indorf, Vice Chair
Chief Innovation Officer
Great Hearts America



Arturo Herrera, Secretary
Special Projects Manager
VIA Metropolitan Transit
Founding Board Member



Mitchell Walker, Treasurer
Chief Operating Officer
Jefferson Bank



Don Barfield
Associate Director
Westat
Founding Board Member



Kayleigh Colombero
Founder & Superintendent
*Etoile Academy Charter
School*



Krystal Grimes
Founder & Executive Director
AAMA Empowerment Services
Compass Rose Parent



Saamra Mekuria-Grillo
Founder & CEO
Formation Ventures



Tino Morenz
Senior Software Engineer
Microsoft



Desi Martinez
Managing Partner
Martinez & Associates, PLLC
Compass Rose Parent

State of Our Board: Strengths and Deltas

Strengths

- Racially/ethnically diverse
- Reflective of and demonstrably committed to our communities
- Vast array of skills and interests that support org work; expertise in the right areas

Deltas

- Not enough diversity of age/experience – lots of late-30s/early-40s folks
- Six men, four women
- Not enough deep finance expertise; we're maxed out as a strong Growth Phase board
- Not a lot of time to give; board is FULL of overstretched, mid-career leaders

My Next Steps in Board Development



- Strengthen our finance & facilities functions
 - Get us to the \$100M annual operating budget Stewardship Board we need to be
- Increase board membership to 14-16 members (see below)
- Improve Board Committee structure → this is where the real work of the board should get done (more members helps this)



Community Engagement

Building Strong, Lasting Connections

An everyday, all-in endeavor, including block-walking, tabling, engaging with local stakeholders, connecting families to opportunity, etc.



Three Major Goals of Community Engagement

AWARENESS

- There is no reason for people in your community to know your school exists unless you tell them about
- And there is no reason for them to believe your school is special unless you show them why it is special...all the time.

ENROLLMENT

- Likewise, there is no reason for families to enroll their children in your school without your help
- They will not just magically show up
- It is up to you to close the deal with each and every family!

SUPPORT

- Schools are part of the social support net
- Families of all kinds need our support; every family is different and has different needs
- Educating children is our number one priority, but we ultimately exist to make the world better; so, we provide support

You need a unique and targeted approach to meet each of the three goals

Big Community Engagement Wins

AWARENESS



SUPPORT



ENROLLMENT

	23-24 Grades	Data					23-24 Application Data		Enrollment Team Data			
		To date Total Enrollment	% to target 105% enrollment	Seats Left to Fill	Current to recommitment conversion	App to New RC and RV Conversion	Actual Apps	% of app goal	Offered Accepted	RP	RC and RV	Conversions needed
	TOTAL	474	102.13%	-10	90.64%	32.22%	630	103.55%	15	53	40	100
Journey Secondary	6	66	104.76%	-3	86.96%	46.43%	56	80.46%	2	3	4	16
	7	61	64.55%	34	85.71%	32.50%	40	29.50%	3	3	2	42
	8	58	92.06%	5	100.00%	30.00%	30	48.08%	0	0	1	13
	Persistence rate: 80%	TOTAL	185	83.90%	36	90.73%	126	47.09%	5	6	7	71
	0.5	95	91.35%	9	-%	58.28%	163	52.24%	2	10	86	8
Destiny Elementary	1	125	120.19%	-21	96.15%	65.79%	38	121.79%	0	3	14	3
	2	92	101.10%	-1	70.00%	46.03%	63	210.00%	0	3	18	7
	3	75	117.19%	-11	87.30%	34.48%	58	264.84%	0	0	9	5
	Persistence rate: 20%	TOTAL	447	104.68%	-20	84.06%	359	86.09%	2	16	136	3
	5	98	104.26%	-4	60.22%	60.00%	70	226.54%	0	2	31	5
Destiny Secondary	6	62	100.00%	0	90.32%	7.32%	82	440.86%	0	1	3	2
	7	61	98.39%	1	88.71%	12.77%	47	252.69%	1	0	3	4
	8	65	103.17%	-2	92.06%	17.07%	41	216.93%	0	1	2	2
	Persistence rate: 20%	TOTAL	286	101.78%	-5	80.36%	240	275.86%	1	4	39	13

“Dos and Don’ts” of Community Engagement

- **Do** recognize that enrollment is your primary budget driver; prioritize it accordingly.
- **Don’t** assume someone else will do the hard work for you. There are plenty of organizations who claim they can help you recruit & enroll your students, especially in year one. Don’t listen to them.
- **Do** recognize that YOU are the biggest champion of your school, especially in Year One. Parents will send their kids to your school because they trust YOU.
- **Don’t** assume anyone else can tell the story or make connections the way you can.



- **Do** recognize that the enrollment process is not complete once families fill out an application.; they need LOTS of support to complete the process. Have a plan for that.
- **Don’t** assume Community Engagement is purely transactional and all about enrollment. Your community deserves your deep commitment every day.
- **Do** set daily, weekly, and monthly targets for applications, conversions, and engagement activities and hold yourself accountable for meeting them.



Paul Morrissey

Paul.Morrissey@CompassRoseSchools.Org

LinkedIn:

<https://www.linkedin.com/in/paulmorrisseycra/>