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# Utah State Charter School Board Recommendations

Developed by The Learning Collective  
2025



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# Objective

The Learning Collective (TLC) produces a report with recommendations on how SCSB could enhance its relationship with charter school boards of its authorized schools and help build the capacity of those charter school boards.

# Methodology

- 56 anonymous charter board member survey responses
- 6 charter school board focus groups of 15 total board members
- 6 individual interviews of authorizers in 4 states
  - Central Michigan University Center for Charter Schools; Deputy Director
  - Central Michigan University Center for Charter Schools; Director of Board Governance
  - Indiana Charter School Board; Director of Authorizing, Evaluation, and Assessment
  - Mississippi Charter School Authorizer Board, Executive Director
  - New Orleans Public Schools; Executive Director of Portfolio Innovation
  - New York State Education Department Charter School Office, Executive Director (by email)
- Additional interviews:
  - Board Chair and additional Board Member, Utah SCSB
  - Executive Director, Utah Association of Public Charter Schools
  - Vice President for Leadership & Learning, National Charter Schools Institute
- Multiple discussions with SCSB staff members
- External publications & resources considered:
  - "Defining Governance Management" and "Charter School Board Job Descriptions," BoardOnTrack
  - "Principles & Standards," and "Practices that Matter," NACSA
  - "What's the Board Got to Do With It?", National Charter School Resource Center
  - "Leading with Intent: BoardSource Index of Nonprofit Board Practices," BoardSource
  - <https://nationalcharterschools.org/>
  - "The Lighthouse Inquiry," Iowa Association of School Boards
  - "CharterCloseout\_AppendixC\_GuidanceDocument" and "CharterCloseout\_AppendixB\_FinancialFramework\_SY23-24," New Orleans Public Schools [ATTACHED]
  - <https://www.utahcharters.org/>
  - NYSED Merger Application

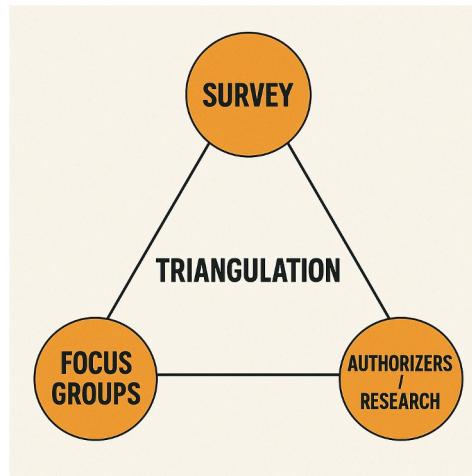


The Learning  
Collective

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# Methodology Triangulation

Utilizing information from three sources creates informed recommendations.





## Adam Aberman/TLC Representative

- CEO and Founder of [The Learning Collective](#), established 2003
- Evaluated over 300 current charter schools nationally (California, Colorado, Illinois, Indiana, Michigan, Minnesota, New Jersey, New York and Washington) ... 2022-2024 TLC team conducted 60 renewal visits for Chicago Public Schools
- Facilitate board retreats for independent charter schools and charter management organizations (CMOs)
- Helping update performance frameworks for Philadelphia Charter Schools Office
- Led Tennessee State Board of Education's strategic planning and goal-setting for 1,700 schools serving 1,000,000 students
- Evaluate new application evaluations for New Orleans Public Schools' and Mississippi Charter School Authorizer Board
- Former bilingual public school teacher Los Angeles Unified
- Charter school founding parent



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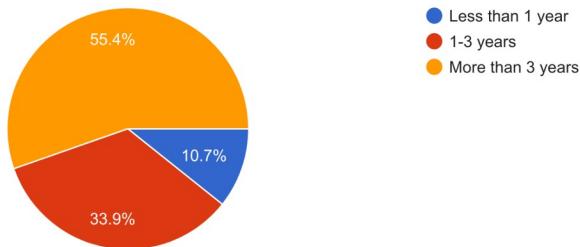
# Surveys

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# Survey Respondents\*

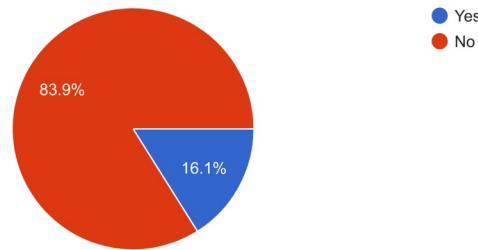
For how long have you have served on the charter school board?

56 responses



Have you served on other school boards (charter or district)?

56 responses



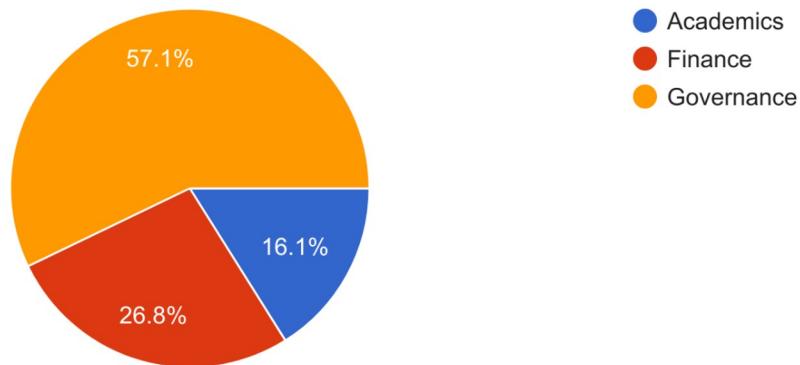
\* 56 responses represents a small percentage of all LEA board members

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## Trends in Survey Responses\*

In which area does your board need the most support and guidance?

56 responses

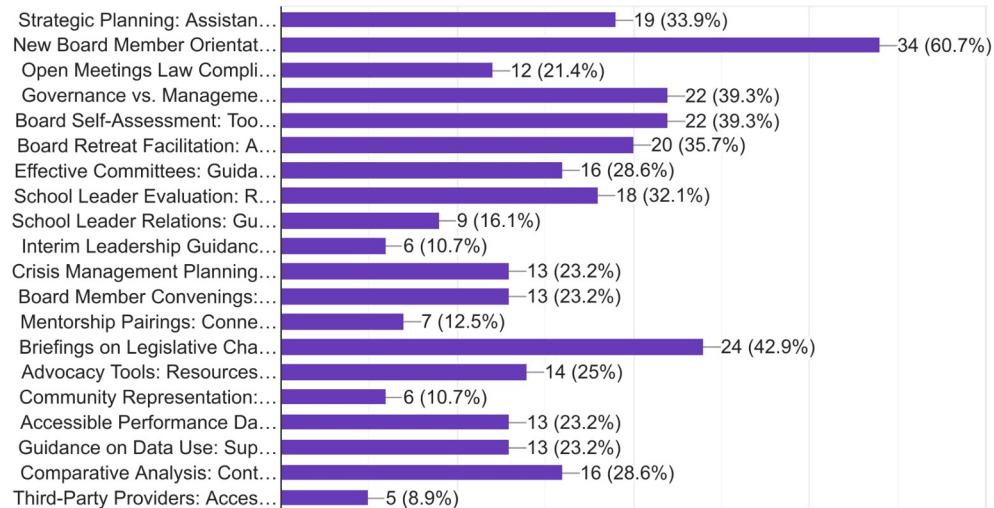


# Trends in Survey Responses

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In which of these areas would you want specific trainings or support for your charter school board  
(check all that apply)?

56 responses

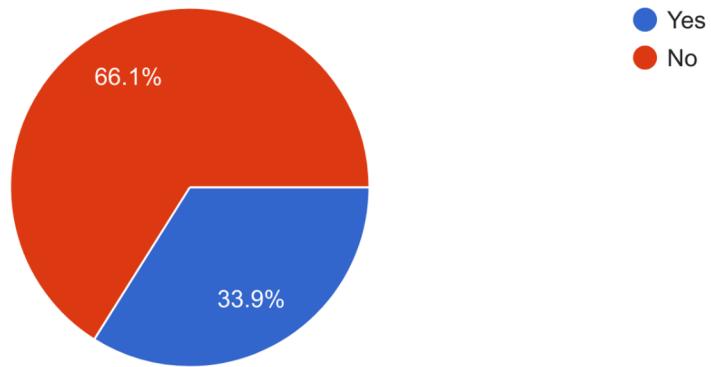


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## Trends in Survey Responses

Do you want more customized support from SCSB to meet your particular board needs?

56 responses

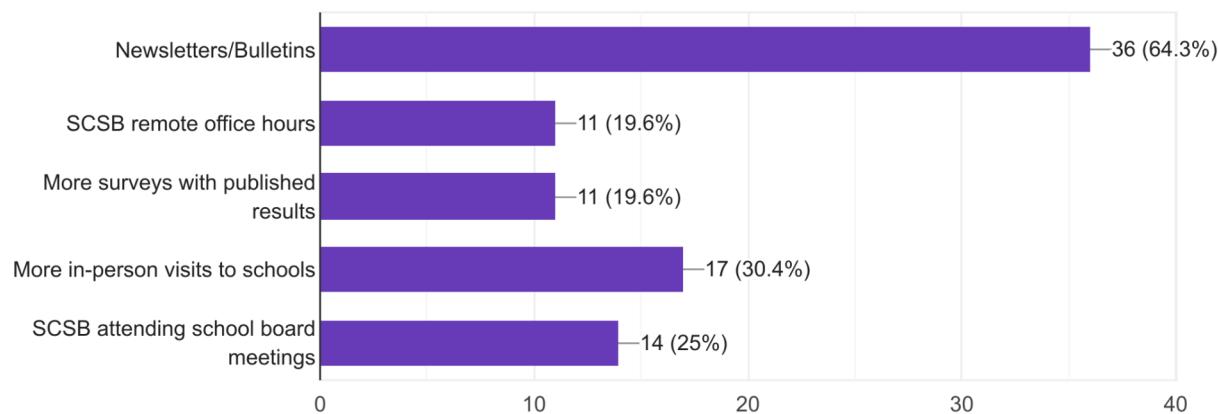




# Trends in Survey Responses

What types of communications from SCSB would be most useful?

56 responses

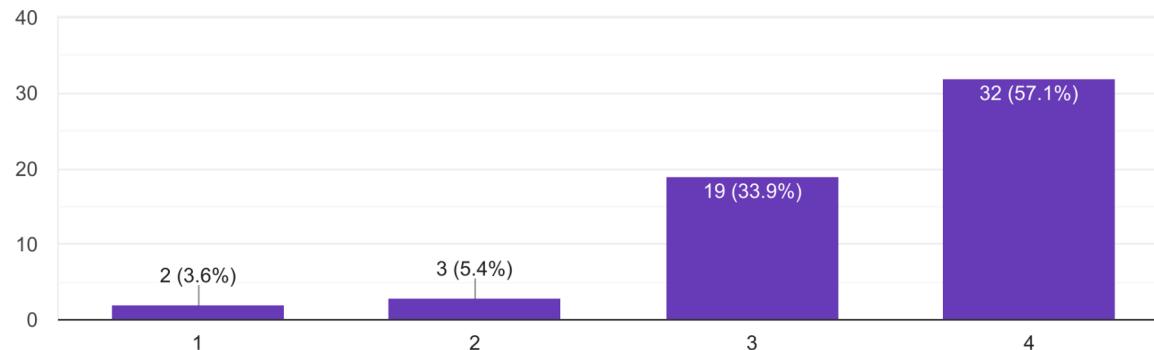




## Trends in Survey Responses\*

Timeliness & Responsiveness: How responsive and timely is our office in providing information when requested?

56 responses



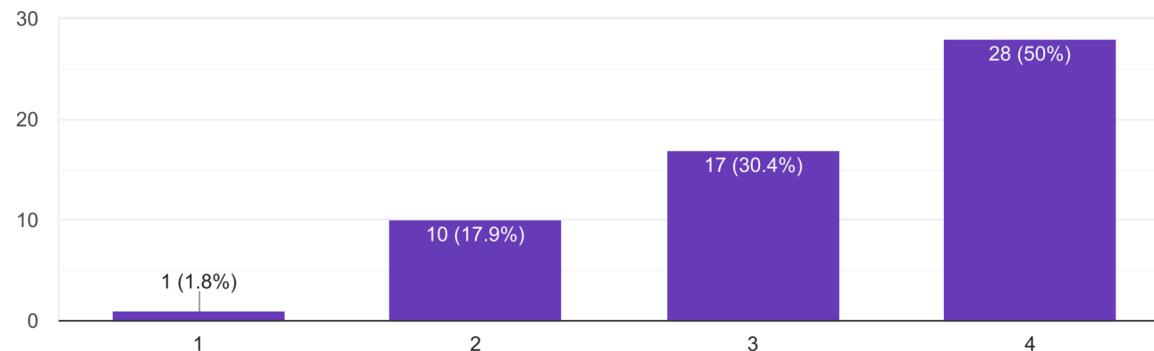
\* 1 represents the least favorable response, 4 represents the most favorable response



# Trends in Survey Responses\*

Support for Continuous Improvement: How well does our office support your school's efforts to improve academic, operational, and financial outcomes?

56 responses



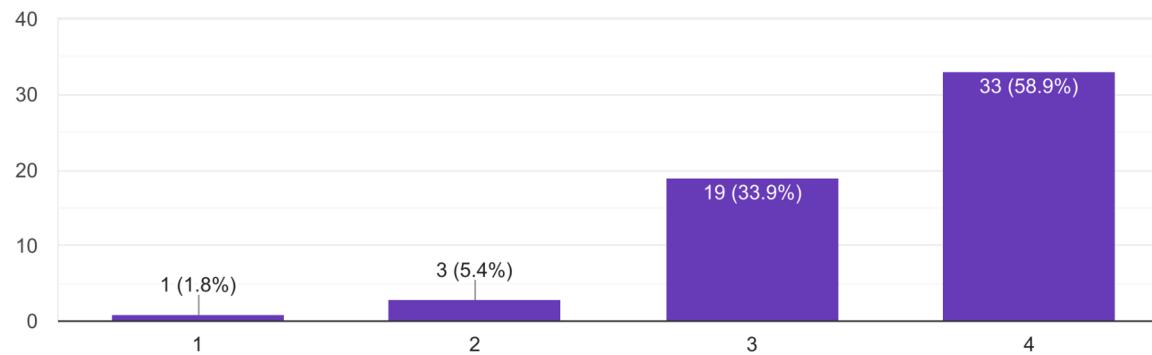
\* 1 represents the least favorable response, 4 represents the most favorable response



# Trends in Survey Responses\*

General Perceptions & Relationships: How would you describe your school's working relationship with our office?

56 responses



\* 1 represents the least favorable response, 4 represents the most favorable response

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# Focus Groups/Interviews

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## Strengths: Trends in Board Focus Group Responses\*

- SCSB staff members are helpful when board members ask SCSB questions. SCSB staff members respond to questions very quickly.
- SCSB demonstrates flexibility in working with and facilitating boards and schools on problem-solving and developing creative solutions.
- The Associate Executive Director is particularly helpful ... “Marie should run for governor!”
- “Feels like they are on our side.”
- Board members believe they are sufficiently knowledgeable about academics and academic outcomes.
- Board members believe that the training, provided by Brian Carpenter and enabled in part by SCSB, was highly beneficial.

\* 15 interviewed board members represents a small percentage of all LEA board members

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## Areas for Improvement: Trends in Board Focus Responses

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- Some board members cannot discern the difference between the Utah Association Public Charter Schools (UAPCS) and SCSB.
- Some board members have had little to no interaction with SCSB.
- There are currently no opportunities for board members to learn from peers on other charter boards.
- There is no clear mechanism for boards to provide feedback to SCSB on SCSB's practices.
- New board members, as well as new treasurers and finance committee chairs, could benefit from initial training, unless they already had training from Brian Carpenter.
- Focus group participants would like more guidance on governance vs. management best practices. They are not aware of assistance SCSB has already provided in that area.
- Special Education is an area of compliance in which schools could benefit from more guidance on reporting and programming.

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# Recommendations

*Effective governance—by boards that hold a clear vision for learning and continuously improve—is a critical driver of student success in charter schools.*

— Education Commission of the States,  
Governance in Charter Schools

## Relationship-Building

1. Be clear about the goal for relationship-building and support and plan backward accordingly.

Suggested goals:

- o Relationship-building SMART Goal: By June 2026, improve the quality and frequency of relationships between SCSB and LEA boards (measured by pre- and post-surveys; pre-survey results listed above).
- o Support SMART Goal: By June 2026, improve the quality and frequency of support that SCSB provides LEA boards (measured by pre- and post-surveys; pre-survey results listed above).

2. Going forward, SCSB should focus on new initiatives aimed at LEA board members only if those initiatives clearly enhance SCSB's relationship with LEA board members.

3. For the next 12 months, there are two recommended initiatives to focus on:

- o Board Member Orientations
- o Board Networks

*Board orientations provide an official launch for new partnerships and relationships.*

— BoardSource

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## Initiative #1: Conduct Board Member Orientations

Establish immediate rapport with all new board members, and board members serving in new roles, by providing orientations and initial training to the following three groups:

1. New board members (though provided by UAPCS to some LEAs, SCSB providing this to all LEAs free of charge establishes an initial and immediate connection between SCSB and board members)
  - a. Conducted by SCSB Associate Executive Director
2. New board chairs
  - a. Conducted by SCSB Executive Director or Associate Executive Director
3. New treasurers/finance committee chairs
  - a. Conducted by SCSB Financial Education Specialist

# Initiative #2: Facilitate Board Networks

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With over 100 LEA boards, and given SCSB's lean staffing structure, boards' collective wisdom should be harnessed to support other boards, and promote community-building, through:

1. 1-2 in-person annual convenings, hosted by SCSB, provided exclusively for board members (some occur Saturday mornings). Helps build camaraderie and helps board members feel they are part of something bigger than just their schools. Focus on inspiration and being part of a movement with a higher purpose.
  - a. Could include the orientations discussed earlier (new members, board chairs, finance committee chairs)
  - b. One annual convening could be of board chairs and the other could be of treasurers/finance committee chairs
  - c. Could take place regionally: Tooele County, Washington County, North/South Utah County, etc.
1. Start three What's App groups: 1) New board members (focus on newer members but any member could join), 2) Board Chairs, 3) Treasurers/Finance Committee Chairs.
  - a. Introduce monthly topics such as: Opening high schools, Employee/executive compensation and KPIs for leaders, School expansions, Recruiting and selecting new board members, Making board committees effective, How to utilize school budget surpluses and what are best practices for distributing that (higher salaries, paying off buildings, etc.), Guidance on how non-educator board members could best become conversant in education
1. Pair new or struggling boards with experienced, high-performing boards for 1-year mentorship.

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## Additional Supports to Enhance Relationships w/Boards

- 1. Continue this process (surveys and focus groups) annually to elicit feedback from LEA boards.
- 2. SCSB staff continue providing timely responses to LEA board questions.
- 3. SCSB staff attend (remotely) several board meetings of every LEA annually (consider quarterly), and encourage boards to have SCSB make a short presentation when SCSB attends. Enables SCSB to better understand issues boards are facing and be more proactive in supporting boards.
- 4. Provide training and guidance on:
  - a. Governance vs management, with an emphasis on specific actions a board can and should take in regards to governance
  - b. Special Education compliance
  - c. Utah State Board of Education reporting, including financial reporting
- 5. Disseminate quarterly bulletins written specifically for LEA board members.
- 6. cc board chairs on all emails SCSB sends to school leaders.
- 7. Recognize high-performing boards and highlight their innovative governance practices in SCSB's annual report.



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## Other Recommendations

1. Hire a full-time board support specialist, or contract with a third-party such as [Dr. Brian Carpenter](#) or the [National Charter Schools Institute](#), to provide regular support to the LEA boards. This aligns with the SCSB Strategic Plan goal to “Increase capacity among SCSB members and staff for supporting the priorities of the SCSB.”
  - a. See the [full-time](#) and [part-time](#) SCSB LEA Board Support Specialist job descriptions
2. Though UAPCS sends Legislative Change updates, would be helpful to boards to receive an objective, summary legislative update at the end of each legislative session from SCSB.
3. Develop and provide a board self-assessment tool developed by SCSB.
4. Track the vacancy rate of each board and provide assistance to boards with high vacancy rates.
5. Impress upon board members their need to be intimately familiar with the contract that the school has with SCSB.
6. Update the SCSB website.

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## Closure Recommendations from Other Authorizers

1. Identify potential closures early, including frequent communications with board, staff and families - including timeline and next steps that school must take.
2. Watch finances closely in closure year. Be clear on what can occur in regards to fund balances and what spending is allowed ... avoid what happened in other states in which schools in their last year went from having a healthy fund balance at the beginning of the year to having no funds by the end of the school year. Consider holding monthly meetings with the school to review finances throughout the closing year.
3. Require the school in jeopardy of closure to set aside some funds in an escrow account to fund closure.
4. Regularly attend board meetings to ensure appropriate transparency conveyed by the school leader and that the school leader is presenting accurate data to the board, including information on the performance of student subgroups and whether the school can pay its staff and facility costs.
5. Consider notifying the public in the spring of the closure year that the school will close; earlier notifications could jeopardize the learning experience of students at the school due to staff departures.
6. Ensure school develops, and implements, a plan for full transfer of student records.
7. See the attached two documents from New Orleans on detailed steps to take to prepare for closure.



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## Merger/Consolidation Recommendations from Other Authorizers

1. Start by establishing a succession plan and vision for a particular merger/acquisition.
2. Ensure there are two independent counsels for each LEA.
3. Ensure boards are leading the merger/consolidation, rather than school leader, so that the long-term health of schools is kept paramount rather than a focus on the potential of short-term interests of particular school leaders.
4. Conduct due diligence to ensure the proposed school leader has the capacity to lead the larger school at the end of the merger.
5. Try to avoid a merger of two boards coming together and having a board twice the size.
6. Be conscientious of how debt and revenue will transfer; ensure there is no unknown debt being transferred.
7. Boards need to examine facility opt out contract clauses.
8. Generate community buy-in, in part to attempt to avoid significant student departures. Include the acquired/closing school vetting future operators to select the most desirable future operator.
9. Mergers should not be used as a tool to allow an underperforming school to avoid accountability by moving to an authorizer who may be perceived as more lenient in their oversight.
10. Consider the New York State Education Department's [Merger/Consolidation Application](#).



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**Thank you for the opportunity to  
assist with this important  
project!**