

How a Teacher Partnership Manages A Public School

Notes of a discussion at Dorsey & Whitney

17 June 2008

When the discussion began about the 'partnership' model in public education there were no partnerships to look at. Today there are. So we wanted to explore with one teacher-run school -- Avalon School, in Saint Paul -- how that partnership handles professional and administrative matters. **Gary Johnson** in Dorsey & Whitney had offered to host a discussion, with partners in similar professional fields and people in public education.

"On the witness stand" was **Carrie Bakken**, one of the founding teachers in this eight-year-old school (www.avalonschool.org). Around the table, to explore these questions, were: Johnson and **Peter Hendrixson** who'd for six years been managing partner of that Minneapolis law firm; **Dan Mott**, a partner with Frederickson & Byron, who helped organize the first teacher partnership at New Country School about 1992; **Dr. Thomas Marr**, medical director for clinical relations at HealthPartners; **Richard Bend**, an attorney and a founding board member of the Michael Frome Academy, a chartered school which will open September 2008 in Woodbury and will use the partnership model; **Beth Hawkins**, a journalist commissioned by *EducationNext* to do an article on teacher partnerships; **Jim Miller**, a longtime partner with Larson/Allen, an auditing, accounting and consulting firm; **Ed Dirkswager**, who formerly ran the administrative side of Group Health, was for a time chair of the National Cooperative Bank, and who was later a consultant with Dr. Marr in forming physician practices; **Dick McFarland**, formerly CEO of RBC Dain Rauscher and ("not today") a board member of the McKnight Foundation; **Louise Sundin**, past president of the Minneapolis Federation of Teachers; **John Maas**, at various times a principal, deputy commissioner of the state agency, executive director of the superintendents association, consultant to the school boards association and business manager of a district, in Minnesota K-12; and **Jon Schroeder**, **Tim McDonald** and **Ted Kolderie** of Education | Evolving.

The discussion went about as follows:

Bakken: I'd gone to law school; was going to work with young people in the criminal justice system. I taught for a while at PYC, an alternative school in north Minneapolis. I decided I'd rather work with kids in another way. Avalon opened eight years ago. We were sponsored by Hamline University; affiliated with EdVisions. We started with the project-based learning model used at New Country School. We are a cooperative; with no administrator, director or principal. We began with eight teachers ('advisers'). We now have 23 people: 16 licensed teachers, five assistants, two persons in the office. We have grades 7 to 12, but only 36 students in the lower two grades. The summer before school opened we split up all the administrative work. The science teacher knew *Quicken* so he volunteered to be business manager. I think back: We were so naïve at the start; it has been such a work-in-progress. With experience we found it was too much to teach and handle these duties. So we split off separate positions for business manager and program-coordinator. The business manager now does that full-time; loves it; is going for an MBA. The latter position has been shared this year between me and Gretchen (Sage-Martinson). But we're clear: These are not 'authority' positions. Decision-making rests with the group. We all meet weekly. The school is a non-profit with a teacher-majority board: four teachers, two parents, one from the community. We were concerned when one of our founding members, formerly head of the Quaker school here, retired. But we have found the strength is in the group. It is impressive to watch the stability over the years. The coming and going of people does not change the school. Next year I will be back full-time; half-time as program coordinator and half-time as an adviser (teacher).

The questions began on the subject of people; personnel. **Bakken:** We are careful about recruiting, careful to evaluate performance along the way. We try hard to be sure that a teacher coming to the school wants also to be a member of the cooperative; participate in the governance of the school. We don't ask the assistants to take on extra work but we do ask them to take part in the decision-making. We evaluate ourselves. We have had to terminate people. We have to be diligent about professional performance. **Bend:** How do you tell whether a new person will be a good co-op member? **Bakken:** Usually a diverse background, multiple interests, is a good indicator. We have one teacher who'd spent a career at 3M; another who'd been in the Peace Corps. **TK:** Is there an economic dimension to membership? Does a teacher make an investment? **Bakken:** No. **Mott:** Will Avalon hire if a teacher does not want to be a co-op member? **Bakken:** We want all to be members. **Mott:** This has been an issue in law firms: Should all be partners, or some simply salaried lawyers?

Johnson: Project-based? **Bakken:** The students take a few traditional classes, seminars. Most of their work is on individual projects where they can work at their own pace. So you work with students individually. This means you're not just standing in front of a class all day. If an administrative question comes along you can deal with it at your desk. You can multi-task.

Compensation. **Bakken:** We try to follow the Saint Paul salary schedule. We do pay for prior teaching experience. We pay some stipends for extra work. For example, I get something more for the program-coordinator role since I work over the summer. We are very efficient; financially healthy. We carry a sizeable fund balance. We have no director's/principal's salary to pay. A year ago we distributed a 'longevity bonus' and I believe we will again this year. We are still an affiliate member of EdVisions but we are no longer in their payroll/benefits program. Our relationship with them was really helpful, though.

Marr: How does the group handle conflicts over what to do? **Bakken:** It's been surprisingly easy. When we know there's a contentious issue coming up we talk a lot ahead. In the meeting we use a "fist of five" system. People hold up five, four, three fingers to indicate some degree of agreement. One or two is disagreement. A closed fist blocks action. We talk it out. It is a group decision. I had been on the personnel committee for some years but I took myself off when I realized that in my role as program coordinator some of the new people were seeing me as a boss. We had an 'administrative team', but gradually learned to do without that. You have to work at maintaining this culture. There's a huge learning-curve for new people.

Miller: What's the turnover? **Bakken:** Low. Last summer we had two leave, to teach abroad. **Miller:** To me, this is a sign of success. **Hendrixson:** How else do you define success? **Bakken:** Our sponsor sets goals; checks to see if we've made them. We have to meet all the state requirements. We're measured. We also do satisfaction surveys. **Hendrixson:** What's your feeling about the testing? **Bakken:** I wish there were less of it. The Profile of Learning was better for us; more outcome-based. The new standards are very fact-based and specific. There is just a lot of testing. Most of April is lost to testing.

Schroeder: Talk about the students' role. **Bakken:** A nice thing about our cooperative is that it models democracy for the students. They wrote a school constitution, the first year. It was a great learning experience for them. And they see their voice matters. Congress meets weekly; any student can join in. How many come depends on the issue. When students are more frustrated, more participate. Initially the kids were angry about the dress code; said it was

too much like a big district. Congress wrote the dress code. Congress can send us a bill: The advisers are the 'executive branch'; can veto.

Sundin: How do you evaluate teachers? **Bakken:** Initially, with a rubric. Now we use a survey monkey. Every staff member participates. A team reviews. Parents and students are asked, as well. It's anonymous. The key question is whether an adviser is meeting the job-description. What does that adviser do well; not do well? It ends by asking whether this person should return next year. **Sundin:** So you don't use professional standards? Those in state law, or those from the National Board. Some districts develop their own. **Schroeder:** Is the nature of the evaluation affected perhaps by the project-based character of the learning program? Do the standards assume traditional teaching? **Bakken:** Avalon's job description is very detailed; probably covers all that. **Sundin:** Let's discuss this some time.

Marr: How large a school do you think this model would work in? And: Are you subject to more or to fewer state restrictions? **Bakken:** It depends. The American History requirements are pretty restrictive. The standards emphasize breadth not depth. But generally we have tremendous freedom. If something is not working we can quickly reverse course. We have now decided to go to classes for math. We decide these things. **TK:** Isn't this a function of the autonomy provided to a chartered school, rather than of the partnership model? **Bakken:** It's still better when the teachers rather than an administrator decide it. The teachers are better informed. As to scale, I think this model would work in a larger school. At Avalon we have decided not to expand further. But it would work with a larger school. We could figure it out. When we had eight people I could never imagine 23. We think we've shown that at this size a teacher group clearly is capable of making decisions. I think districts could do a lot more site-management on this model.

Student behavior. **Bakken:** We have some issues. These are handled by the adviser, not by me. Perhaps with the parents. Sometimes we use mediation.

McFarland: What's the graduation rate? **Bakken:** Really high. This year one senior did not graduate. **McFarland:** College? **Bakken:** At least 85 per cent.

Bend: In what ways have arrangements changed over the years? **Bakken:** I mentioned the decision after three years to separate-out the business-manager and program-coordinator functions. **TK:** I know your school is legally a nonprofit corporation. Are the teachers formally organized as a cooperative? **Bakken:** No. **TK:** You're a 'virtual' cooperative, then. The teachers control the

board of the school; you delegate to yourselves. **Mott:** Avalon is a school in which management is delegated to the employees. They're not a separate enterprise contracted to the school, which was the original idea. **TK:** Like New Country. **Mott:** Yes. **Bakken:** Good point. Currently we're having to set up payroll. Our people had been employees of EdVisions, which handled payroll, etc. Now we've gone to Wells Fargo for this service, and for benefits. So the school is now the employer. We're still sorting this out.

TK: Clearly lots of different things are being tried, with this partnership model. Louise, would you talk about the MFT's idea for 'self-governed schools'?

Sundin: Just yesterday we filed the application for a grant for this. In 2005 we'd asked the Legislature for an amendment to the site-management law, to create schools that would be within the district but possibly (my preference) without an administrator; separate enough to have real autonomy. It was strange bedfellows: the MFT and the Business Partnership. Everybody opposed it; the whole 'cartel', as Senator Pogemiller likes to say. The principals opposed it; still hate it. Even our state union opposed it. But it passed. Implementation has been slow because of all the changes in Minneapolis district leadership. But we have asked about eight groups of teachers if they want to start their own school. In some ways this is like Southeast Alternatives, years ago. There will be a lot of opposition. But there is a lot of discussion about this now, nationally. In the Teachers Union Reform Network, for example. The universal complaint among teachers now is about lousy leadership at the school level. The changing demographics fit into this. It used to be that people came into teaching wanting the security of civil service; a career. We're now getting a younger generation with a different mindset. They want to make a difference; perhaps stay only a few years. And what Ted said earlier is right on: Much of the talk today is about getting "better people for the job"; not about getting "a better job for the people". It's very top-down today; centralized. And this is not working.

Bakken: This past year we've been getting fantastic applications from people who want to come to Avalon; teachers now in districts, who want the sense of ownership. **Sundin:** A lot of the best *are* leaving.

Johnson: There is a question in all kinds of organizations about getting decisions close to the working level. **McFarland:** Sure. Our company had maybe 150 branches. Where we had a good branch office we had a good branch manager. Most came up through the company; were basically selected by the brokers in the office. We watch turnover carefully, as an indicator of success. If things aren't working you have to fire somebody. **Bend:** It's turning out that the personal characteristics are less important to organizational success

than the flow of information, the decentralization of responsibilities. The key is to get the structure right. **Marr:** Within any structure there are critical human factors, cultural factors, that shape success. There's no single model that guarantees it. **TK:** Is your 'program coordinator' position essentially the 'managing partner' position? **Bakken:** I suppose so. **TK:** Do you and Gretchen each take half the job, or do you divide the responsibilities? **Bakken:** She takes more of the student and marketing questions. I do more in handling the process; compliance, etc. **Q:** Could you be fired? **Bakken:** That'd be easy. One question on the survey is: Does this person seem confident about the position he or she is in? **Sundin:** Another big problem today is the attitude that age and experience are a negative for teachers. **McFarland:** Is this because the older teachers aren't keeping up with the technology? **Sundin:** No. **Bakken:** Experience *is* important. **Dirkswager:** There's no one model for a teacher partnership. The partners can do the administrative work themselves, or delegate it to someone they hire. Lots of possible variations.

TK: We've talked so far about starting with the delegation of responsibility to the school; and about teachers then assuming that responsibility. I want to ask Tom Marr about HealthPartners. Some years back, when it was Group Health, we had a meeting where Dr. Brat explained there were both a corporate board and a medical-dental board. Pretty quickly the teachers were saying: Our district has a corporate board: Where's our professional board? **Marr:** Let me respond more generally. There're similarities today between health and education. People are dissatisfied. Cost is excessive. Trust in the professionals is slipping. Health care is shifting from autonomy to accountability. In today's world it's the kiss of death to say to doctors, "You just practice medicine". It's a huge cultural change. A structural change, too, driven by the cost of technology and by the growing complexity of managing the business. Successful small groups are selling their business to hospitals and becoming contracted professional organizations. This is a model in-between the old private practice and the pure employee model. There are some things the business side is accountable for; some things the physicians are accountable for; some things they're accountable for together. Group Health was an employee model; people on salary. In HealthPartners today payment is mostly by productivity. We have about 650 physicians, at 22 practice sites. **Q:** What about the Mayo Clinic? **Marr:** It is a physician group; a salary model -- now also facing pressures for productivity.

Bend: How do you measure success: by financial results? By patient outcomes? **Marr:** It's mostly based on measures of what the physician does: number of patients seen, etc. We also measure satisfaction. **Bakken:** I think our model of

school is very efficient; financially sound. **Marr:** That's why I asked you about size.

TK: All the pressures about cost and performance and satisfaction come together to be handled in this teacher-group. We think the national policy discussion about education needs to think much more, now, about the "better job for the people" -- not just in the teachers' interest but in the interest of getting a model that works for the country. Minnesota, again, can be a leader; showing what's developed here. It is a problem that the partnership does not appear in the research. Last year I came across *Who Controls Teachers' Work?* The author says: teachers don't. I got in touch; asked if he knew there are now schools where teachers do. He didn't; was interested. So we are planning a national meeting this fall to raise the visibility and the priority for this model. Louise has heard this idea discussed at TURN. There's been a session at the national office of the American Federation of Teachers. It might be possible to reach the new president of the NEA. But it will be important to have the help of people who are able and willing to 'testify' to the effectiveness of the partnership model in these other professional fields.

Miller: My people say Minnesota's charter program is good because it provides for 'at will' employees; it is possible to do something when people don't work out. **Sundin:** I would note some disagreement with the blanket nature of that. **TK:** What we've heard re: Avalon is not about the ability of managers to fire employees. It's about the ability and the willingness of the teacher-group to deal with questions of quality and performance when the teachers, rather than an administrator, are in charge of the school. **Bakken:** It costs way too much to recruit and to train people. We try to help people succeed. **Johnson:** We've learned here, too, that it's not an answer just to be able to fire someone. When you're a group you want people to succeed. So you do more mentoring. Dismissal is a last resort; a failure.

McFarland: This article by Richard Ingersoll is one of the finest articles I've ever read on this subject. (Note: Ingersoll is the author of *Who Controls Teachers' Work?*)