



'We Are One Community'

How a charter-district compact in Colorado's Roaring Fork Valley built bridges, trust and family access



Photo courtesy of Two Rivers Community School

"Children and families are best served when educators view one another as colleagues rather than competitors. This is especially true when it comes to relationships between district leaders and elected boards and charter schools."

Dear Friends,

As Gates Family Foundation has worked over decades with schools, districts, and public charter schools across Colorado, we have seen time and time again that children and families are best served when educators view one another as colleagues rather than competitors. This is especially true when it comes to relationships between district leaders and elected boards and charter schools.

These relationships can be fraught, but when lines of communications are opened, more often than not, areas of common interest emerge and animosity dissipates. This was certainly the case when, in 2018, I began working with the Roaring Fork School District and the three charter schools that operate within district boundaries. While there had been a history of friction between charters and the district, leaders had a broad enough vision to work through those issues in the interest of what would best serve students and families.

While the compact between the charters and the district that emerged is still a work in progress, and its implementation was slowed by the COVID-19 pandemic, there are already direct and tangible benefits for parents and children. One example: a coordinated enrollment timeline, so that families can feel confident they have found space in a school that best fits their child, and all school leaders can plan more efficiently. And just this spring, Two Rivers Community School, one of the three charters, elected to join the Roaring Fork School District — which could bring more than 20 percent more funding per pupil and "sets the stage for expanded collaboration and communication ... for the benefit of the entire community" according to the school leader.

We believe these agreements and outcomes are replicable in other parts of Colorado and the country, while also providing a unique story of how leaders in this mountainous, rural valley have navigated rough waters. Outside facilitation can provide a leveling effect that helps build trust and allows everyone to be confident that their voices will be heard.

We hope this report inspires others to take on the complicated but rewarding work of bringing school districts and charter schools together in the interest of serving children and families in the best ways possible.

Ana Soler
Senior Program Officer for Education
Gates Family Foundation



ROARING FORK VALLEY

INTRODUCTION

Colorado's Roaring Fork School District (RFSD), set amid majestic mountains 175 miles west of Denver, bears some striking similarities to urban districts, despite its bucolic setting. More than half of Roaring Fork's students are Latino, and 25 percent are English language learners. One-third of the district's students are eligible for subsidized school lunches.

Rob Stein, a long-time Denver educator who became superintendent of schools in Roaring Fork in 2016, was hired in part because he has spent much of his career working with similar student populations, and he has a history of promoting educational equity. He is also open-minded about charter schools and the benefits that the best charters can bring to the kinds of students RFSD serves.

Early in his tenure, Stein reached out to leaders of the three charter schools operating inside district boundaries to forge a collaborative working relationship.

Up until then, there had been what Stein termed a "typical history of animosity" between the district and two of the charters, whose creation had been authorized by an outside state agency, the Charter School Institute (CSI). Interested in promoting educational equity and access to all schools for all students in his diverse mountain community, Stein saw no reason why barriers built up over the past decade couldn't be torn down.

Other school districts around the country have implemented or attempted compacts with their charter schools, but almost always in urban areas. Denver Public Schools has had an elaborate compact with its charters, established in 2010, which, among other things, created a single enrollment system for district and charter schools. In the middle of the previous decade, the Bill and Melinda Gates Foundation provided planning grants to at least 20 cities to develop charter compacts, with mixed success.

2021-2022 School Year BY THE NUMBERS:

Population estimate (2020):
40,069

Median household income
(2019): **\$81,791**

School district population
(2020-2021): **5,647**

Percent of district students
eligible for free and reduced
lunch (2021-22): **37.7%**



**ROARING FORK
SCHOOL DISTRICT:**
(as of 2021-22 school year)

5,647 students

55.6 percent Latino

41.3 percent White

34.8 percent
English Language Learners

Source: Colorado Department of Education



Photo courtesy of Two Rivers Community School

"We started with active animosity between charters and the district.

We have moved past that for the most part, to troubleshooting active problems: What's not working and how to fix it. The third level is how to enhance the experience for all our families and community members: How can we do better some of the things that have been challenging in the past?"

– Angie Davlyn, RFSD's senior project manager

In the Roaring Fork Valley, charter and district leaders alike saw an opportunity to work together to benefit the children and families living in the region, and, after some initial friction, were able to set aside long-standing differences.

Ultimately, what resulted was an unusual compact between the school district and the three charter schools within its boundaries. One of those charter schools was authorized by RFSD and already had a closer working relationship with the district than the other two CSI-authorized schools. One of the two CSI schools – Two Rivers Community School – reached an agreement in March 2022, as a result of the compact process, to become a district-authorized charter as well.

After engaging in preliminary discussions, Stein and the charter leaders brought in Ana Soler from the Denver-based Gates Family Foundation to facilitate the compact conversations. Soler had extensive experience serving as a community-based facilitator, before joining Gates as a Senior Program Officer for Education. The involvement of a skilled, neutral expert helped move the process faster and farther than it might otherwise have gone.

While not a perfect marriage, the discussions and compact have done more than ease tensions. They also created an environment in which trust has increased, communication has improved, and all families potentially have better access to a variety of district and charter school services.

Like almost everything education-related since 2020, implementation of some of the compact agreements, specifically those related to transportation and enrollment, have been delayed by the COVID-19 pandemic. The lines of communication created by the compact, however, did help foster better mutual understanding of how the district and individual charters decided to respond to the crisis.

All parties remain optimistic that the modest agreements at the heart of the compact herald just the beginning of what could become deeper cooperation between the district and the charters.

"We started with active animosity between charters and the district," said Angie Davlyn, RFSD's senior project manager, who participated in the compact meetings. "We have moved past that for the most part, to troubleshooting active problems: What's not working and how to fix it. The third level is how to enhance the experience for all our families and community members: How can we do better some of the things that have been challenging in the past?"



Sonya Hemmen, head of school at Ross Montessori — the charter with the most troubled past relationship with RFSD — also voiced cautious optimism. “We made progress, and there is a lot more to go,” Hemmen said. “There is a laundry list of about 10 things we might, in the future, collaborate on — very well delineated, like transportation — without making it a big deal.”

The next step, Hemmen said, will be to demonstrate that all parties are “really wanting and stating we all want what is best for our children and then showing it by sharing resources. Not just talking about it ethereally, but let’s actually do this.”

This report will briefly sketch the history of the compact, its major accomplishments, the perspectives of district and charter school leadership on what they gained from the agreement, and how the compact can be built upon, not only in the Roaring Fork Valley but elsewhere.

Roaring Fork is not the first school district to enter into a compact with neighboring charter schools, but its rural context makes it unusual. The broader lessons learned, however, can be applied in many contexts:

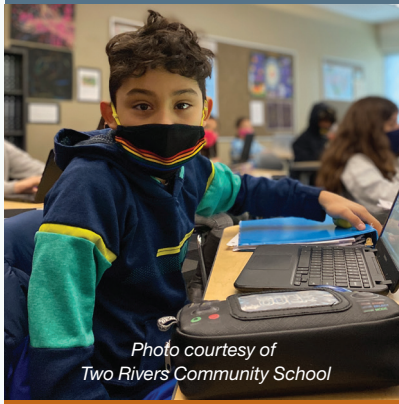


Photo courtesy of
Two Rivers Community School

Steps for Successful District-Charter Collaboration

- 1 — Open lines of communication
- 2 — Establish ground-rules, process and goals with neutral third party
- 3 — Develop a common vision to ensure a student/family-first orientation
- 4 — Be patient, build trust, and celebrate incremental progress
- 5 — Institutionalize agreements through a common document
- 6 — Ensure all parties bring in layers of leadership, to establish long-term commitment

ORIGINS OF THE COMPACT

Over the past 20 years, the Roaring Fork School District in Colorado's central mountains has become increasingly diverse. Workers who serve the Aspen and Snowmass resort communities, many of them immigrants from Latin America, have moved into the area as the cost of living has driven them farther down the valley into Basalt, Carbondale, and Glenwood Springs.

As of the 2021-22 school year, among RFSD's 5,647 students, 56 percent are Latino and 41 percent are white. Just over a third of the district's students are classified as English Language Learners.

When Ross Montessori Charter School opened in Carbondale in 2005, it created instant controversy. Ross wasn't the area's first charter — Carbondale Community School opened in 1996 — but it was the first charter not authorized by the district itself, but by the Charter School Institute, an office of the state.



Photo courtesy of Roaring Fork School District

Ross' founding parents and teachers started the school because previously there had been a strand of Montessori programming at the district's Carbondale Elementary School. But that school closed in 2005, and the superintendent at the time determined that Montessori no longer fit within the district's mission.

"Rather than deciding to give up, a small group decided to open their own school,"
said Sonya Hemmen, Ross's current executive director.

But some district officials and community members saw Ross as a "white flight school," where parents uncomfortable with the Roaring Fork Valley's demographic changes underway chose to send their kids.

That mutual animosity persisted for years. Minimal contact occurred between Ross and the district. Relations between Carbondale Community School and RFSD were more cordial, at least in part because — as a district-authorized school — CCS received significantly more per-pupil funding than did the institute-authorized schools.

Two Rivers Charter School opened in 2015 as a Charter School Institute-authorized school, after its application to be chartered by RFSD was rejected. That rejection caused some friction in the K-8 school's first years, but it has eased over time.

Two Rivers seriously considered applying to become a district-authorized charter in the spring of 2020, before withdrawing its application amid the financial uncertainties caused by COVID-19. The school revived its efforts in late 2021 and early 2022, and won approval to become a district-authorized charter in March 2022.

While earlier RFSD superintendents had not been amenable to charters, Stein's immediate predecessor, Diana Sirko, had less of what he termed an "anti-charter bias." So when Stein took the helm in 2016, relations between the district and charters had begun to thaw. He reached out first to Ross Montessori, where tensions remained highest.

Talking to leaders of Ross and Two Rivers, Stein learned that issues of funding for the non-district charters were at top of mind. Leaders at the two schools felt the district could do more to share resources more equitably to benefit students — for example, letting charter students ride district buses and participate in district-run extracurriculars. Meanwhile, some in the district felt the charters were getting a free ride when, for example, their students joined district sports teams but the schools didn't pay their fair share.

"This created some conversations that led me to reach out to the Gates Family Foundation to say there is an opportunity here to facilitate some conversations about equity," Stein said. For him, that meant that all schools within the district boundary should be equally accessible to all kids, regardless of their country of origin or their native language.



When Ana Soler from Gates began facilitating the compact meeting in 2018, tensions had eased somewhat, but progress toward tangible agreements had been slow. That changed almost immediately. “Having an outside organization leading the process took the onus off of us and made it feel less like the district had an agenda it was pushing,” said RFSD’s Davlyn.

Soler said her first goal after stepping in was to take the group through a visioning process to see what impact this work might actually produce for the area’s students and families if they focused conversations on a shared vision of equity. “Then I asked the group ‘OK, who wants to do this?’ and they all jumped on. It was super-positive. The desire to work together was definitely there.”

A major point of debate during the conversations was allocation of resources across schools. The resource charter schools most desired from the school district was money. Under a state law adopted in 2017, district-authorized charters and district schools must receive an equivalent share of mill levy override (local tax) dollars. Schools authorized by the Charter School Institute, however, don’t get to share in those riches. Instead, they get a slice of a much smaller state fund created to help offset those discrepancies. This results in tough budgetary decisions that can have a direct impact on classrooms, and on students’ school experiences.

The resulting funding discrepancy is significant. According to CSI, in 2019 CSI-authorized charter schools were allocated an average of \$317 per pupil from the Mill Levy Equalization fund, compared to the average \$1,535 per pupil that Colorado district schools receive from local Mill Levy Overrides.

Stein and his leadership team said they would welcome both Ross and Two Rivers into the RFSD fold if they chose to apply for authorization through the district.

When Two Rivers joins the district for the 2022-23 school year, it will see immediate benefits, according to both Stein and Two Rivers head of school Jamie Nims. The biggest win will be an additional \$2,600 per student in district mill levy funding available only to district schools and district-authorized charters.

Because Roaring Fork voters passed a \$7.7 million mill levy increase in November 2021, bringing Two Rivers into the fold will not decrease funding for existing programs, Stein said. “It’s a real infusion of money for their school that doesn’t take away money from us.”

Stein called the amiable negotiations with Two Rivers “evidence of success” of the compact’s impact. In addition to the additional money, Stein said, a percentage of district-built teacher housing will be made available to Two Rivers teachers. In an area where housing prices often make homeownership and even renting out of reach for people on teacher salaries, this represents a significant recruitment tool.

Nims said becoming a district charter will allow Two Rivers to “do some pretty incredible things throughout the school” with the extra funding. The school’s budget will increase from roughly \$4.5 million to \$5.5 million. Classroom budgets will increase, and Nims said he will hire additional support staff to ease the burden on teachers.



Photo courtesy of Ross Montessori School



*“Those are our students.
Those are our schools.
We are one community.”*

*— Rob Stein, Superintendent,
Roaring Fork School District*



Photo courtesy of Ross Montessori School

The school will also boost salaries across the board, so that teachers and administrators can afford to live in the Roaring Fork Valley. The educator housing allotment from the district will help with affordability as well, for at least some teachers.

Another advantage Nims cited is the easy access to the district's professional expertise. As an individual school that is not part of a larger charter school network, Two Rivers does not have a central office that provides professional development and human resources expertise. While CSI did offer some of those services, the physical distance between the Roaring Fork Valley and Denver sometimes created logistical hurdles.

Having the RFSD staff expertise close by will make a big difference, he said. “It will be much easier to go and seek support,” he said.

And what benefit does having RSFD as Two Rivers' charter authorizer bring to the school district? Stein said the answer is simple: “Those are our students. Those are our schools. We are one community.”

Michael Hayes, executive director of the nonprofit that oversees Carbondale Community School, said he believes the district could go farther with its resource-sharing. “From a student and family perspective — and this might not be popular with the district — I'd like to see the district share mill levy and all public funds including bond issue funds, with all public schools, whether they're district or CSI authorized. If we're talking equity, let's talk equity.”

While the compact discussions led to some progress in this area (see below), the parties had, to a certain extent, to agree to disagree and reserve additional conversations for the next round of talks.

\$317 per pupil

Average amount that
CSI-authorized charter
schools receive from the
state-level Mill Levy

vs.

\$2,600 per pupil

Amount Two Rivers will
stand to receive from
the Roaring Fork local
Mill Levy Overrides, as a
result of transitioning to a
district charter



Source: Charter School Institute and Roaring Fork
School District



Photo courtesy of Two Rivers Community School

COMPACT AGREEMENTS

During a series of meetings facilitated by Soler that took place between February and May 2019, charter and district leaders met along with members of the RFSD board and the charter school boards. The first step was to process the sometimes troubled district-charter relationship, and next to find areas of common ground that could lead to agreements on how to collaborate. The agreements that emerged represented small, preliminary steps, all parties agreed — but also built trust, stronger relationships, and a willingness to keep working on additional ways to serve all Roaring Fork Valley kids equitably.

As it currently stands, the compact finalized in December 2019 includes the following agreements, under the two broad categories of enrollment and resources:

Enrollment

Charters and the district will adopt coordinated enrollment timelines. This simplifies the application process and reduces confusion for families. It's also important to the district because in the past, the district would run its enrollment process first. Then charters would hold their lotteries, and students who got a spot in a charter might not show up at the district school, causing staffing challenges. RFSD's Davlyn said that in one recent year a district school wound up 16 kids short and had to cut a teaching position.

Logically, Davlyn said, enrollment systems should be coordinated, or the most 'limited enrollment' schools — charters — should go first, followed by the district. Charter lotteries in 2020 were held two weeks before the district kindergarten registration deadline.

From the charters' perspective, coordinated enrollment makes sense for similar reasons: It increases certainty for small schools where the loss of even a few students makes a significant dent in the budget. Hemmen said that when she told district officials of her proposed timeline late in 2019 and they agreed to go with it as well, "I was absolutely 100 percent surprised, but thrilled."

Under the compact, in addition to common dates, district and charter schools will "provide families access to clear information about all schools, application, and enrollment process to all schools so our families can make informed decisions."

The pandemic threw a wrench in the first year roll-out and caused some confusion over timelines. Ross Montessori delayed its admissions lottery by a few weeks, which threw off the coordination. But school leaders agreed that should be smoothed out in future admissions periods.



District and charter leaders also agreed in principle to work toward having all schools in the Roaring Fork Valley have student populations that closely mirror “special population demographics that are comparable to those of the district.” While this agreement was less fleshed out in the compact, the leaders defined this to include students from low-income families, students of color, English language learners, and students requiring special education services.

Resources

The district and charters agreed to increase opportunities to share organizational best practices and to “facilitate access to professional development and learning opportunities.” RFSD's Davlyn said the district opened the door to charter teachers attending professional development programs. All offerings are posted on a district website page. Charter staff can attend district professional development at no cost in most cases, and for a nominal charge if the district is paying to bring in an outside speaker.

The compact establishes communications channels for crisis management. Nothing as elaborate as a unified text alert system exists, but “we go old school,” Davlyn said, and share information via email. As schools were beginning to cope in March 2020 with the early COVID-19 pandemic, RFSD sent out information on everything from the kind of cleaning solutions the district was using to disinfect classrooms and common areas to what criteria the district was using to determine if and when schools should close.

Stein said that as superintendent, he had easy access to state health officials, while a charter school principal might have a harder time getting a call back. He said he shared the regular updates he received as the pandemic crisis accelerated. “We now have the kind of relationships where we feel this is part of our responsibility,” he said.

Nims of Two Rivers Community School, said “our first closure was a decision made collectively (in March 2020) by all schools in the area, which predated the governor's executive order to close all schools in the state.”

All families will have ready access to school-based health centers as well as family resource services (“housing assistance, food assistance, medical assistance and other impediments to school success”), by making district bilingual outreach staff available to charter school families for whom English is a second language. This was already in place, but the compact codified this practice in writing. Once the pandemic hit the area, school-based clinics had extremely limited capacity and most Roaring Fork families, whether charter or district, were sent to the main offices of Mountain Family Health Centers, located in Glenwood Springs and Basalt.

As discussed earlier in this paper, the community of schools will provide a clear pathway for district-authorized charters to gain access to mill levy and bond funding.



Photo courtesy of Roaring Fork School District



AREAS FOR FUTURE AGREEMENT

The compact also outlines several areas for deeper collaboration in the future. While these explorations have been delayed by the pandemic, interest remains strong in exploring them further:

- **“Joint commitments to special populations,”** particularly students learning English and special education students. Sharing best practices and perhaps educational specialists are among the ideas worth future conversation.
- **Sharing physical spaces, or finding ways to collaborate in this area.** Examples cited include early childhood education facilities, affordable housing for teachers, and right of first refusal for charter schools to buy or purchase “unused/available physical spaces (e.g. buildings or fields).”
- **Parties agreed to seek ways to “leverage” mill levy and bond funding to benefit all students,** though how this might work was unspecified in the compact document.
- **Promoting shared events or collaborations among charter and district students.**



Photos courtesy of Roaring Fork School District

From Stein's perspective, work to date on the compact has opened a wide range of possibilities for the future. He said he was open to discussing “any kind of a service a school wanted to subscribe to that we wanted to offer.”

Nims from Two Rivers school agreed. “The vision developed was super meaningful — and if we really start talking about resource sharing, including mill levy dollars, that moves the needle forward for all kids in the valley,” he said.

POTENTIAL FOR REPLICATION ELSEWHERE

While it is interesting to study how one school district built bridges to charter schools after years of low-level strife, what makes the Roaring Fork compact more broadly meaningful, both in Colorado and in other states, is the potential for replication elsewhere. Participants offered several suggestions for school districts and charters interested in launching similar work.

The first step must be to establish healthy lines of communication between the district and charters. This is easier if relations have been cordial from the start. Absent that, new leadership, especially at the district level, can create fertile ground for establishing trust. Stein's early outreach, especially to Ross Montessori, provides a good example. Both sides have to be open to criticism and willing to listen with open minds to an airing of past grievances.

In some cases, if relationships are too fraught, it might be wise to bring in outside facilitators from the outset. Even if it's possible to launch the effort without external assistance, the second step in the process should be to bring in unbiased facilitators as the real work starts. They can help participants work through old issues, set ground rules that are agreeable to all parties, and establish mechanisms for resolving disputes or disagreements.



Photos courtesy of Two Rivers Community School

Third, all parties must work to establish a common vision for the partnership that features a students/families-first orientation. This is a pivotal step that should not be overlooked. Coming to a shared definition — or at least common understanding — of big-idea terms such as “equity”, “access” and “collaboration” can also be critical. Small wins can build trust and empathy, if each party feels heard and respected. Returning to this wide-angle frame can help diffuse tensions later in the process, should things get heated.

Fourth, everyone must realize that the process of building a meaningful agreement is likely to be incremental. Facilitators and participants alike must be patient, and celebrate baby steps toward progress in the early stages. As trust develops and the group grows accustomed to working together, progress tends to accelerate. But it cannot be rushed.

Fifth, as basic as this sounds, it is important to capture agreements in a common document to prevent disagreements from arising. Down the road, especially when leadership inevitably changes, a shared document can prevent diverging memories or new interpretations.

Finally, stick with it until big wins emerge. This requires the parties to commit to ongoing discussions, even after early agreements are reached.

“What really impressed me, and what made this work, is that everyone kept coming back, no matter how hard or sometimes personal the conversations got,” said Soler of the Gates Family Foundation. “You couldn’t get anywhere if people gave up halfway.”

From the perspective of participants in the compact process, there’s no reason other districts couldn’t and shouldn’t try this. Said Nims of Two Rivers: “I see no reason why this couldn’t spread across the state and the nation and offer a model for relationships between districts and charters.”

ACKNOWLEDGMENTS

Gates Family Foundation would like to thank all those who took part in the creation of the Roaring Fork District-Charter Compact and who took the idea of working better together from a vision to reality. Your starting value of “the kids are all our kids” is an inspiration.

This case study was reported and written by Alan Gottlieb, owner and principal at Write. Edit. Think. LLC, for Gates Family Foundation. It is being published and shared in May 2022, following a delay due to COVID.