Navigating School Reorganization

An Overview

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ADDITIONAL RESOURCES

This is a shortened version of the playbook, "Navigating School Reorganization," which is available on Bellwether's website and designed for charter leaders and boards in the District of Columbia.

Interested in learning more about how Bellwether can apply this expertise in your state and local context? Contact Evan Coughenour, a partner and lead of our organizational sustainability focus area, at evan.coughenour@bellwether.org.

Introduction to School Reorganization

Local and national trends — including declining K-12 enrollment, fiscal pressures, and talent pipeline challenges — are leading more charter school leaders and boards to consider mergers, acquisitions, and other forms of reorganization as strategies for strengthening and sustaining their schools. Leaders and boards deciding whether to pursue these strategies should weigh an organization's circumstances and available alternatives and center what will best serve students, honor the mission, and strengthen school quality. When thoughtfully pursued, reorganization can preserve access to diverse school models, improve student outcomes, and support the long-term sustainability of the organization that carries those models forward.

This high-level playbook offers charter leaders and board members practical guidance on whether and how to pursue this type of reorganization. The guidance draws on national lessons from leaders who have navigated these transitions and is built on the local policy, governance, and community context in the District of Columbia. Leaders in other states, and those exploring other forms of reorganization, such as changes to grades served, management company transitions, or campus closures, may still find much of it useful when adapted to their own state and local contexts.

How To Use This Playbook

Although much of this high-level playbook focuses on the *technical* aspects of reorganization, the work typically requires a great deal of *adaptive* change.[1] Leaders and boards should expect to spend significant time and energy navigating these adaptive aspects of the process, even though they receive less attention in the sections that follow. Reorganization involves far more than an organizational transaction — the process often requires leaders and board members to sit with uncertainty, to be vulnerable with a potential partner and with their own community, and, in some cases, to confront the possibility that the organization they built or lead may not continue in its current form.

This playbook is a decision-support *resource*, not a push or mandate to reorganize. At every stage of the process described, leaders and boards retain full discretion over whether to continue, pause, or step back. Board members and leaders should feel assured that choosing *not* to move forward at any point is a sign that the process worked as intended. The playbook is designed as a *starting point* for internal discussions and conversations with local charter authorizers, potential partners, and external advisers. In addition, this playbook is intentionally nonexhaustive. It is meant to complement, not replace, the professional judgment and local expertise of local education agency (LEA) leaders and boards. As a static and generic resource, it also lacks the depth and specificity of advice from legal, financial, and management professionals.

When and Why Should We Consider School Reorganization?

Reorganization is one of several strategic options available to charter school leaders and boards. It is most effective when considered proactively rather than in response to a crisis or an isolated partnership inquiry. Boards should periodically assess whether their current organizational model remains the best way to advance their mission and revisit that assessment as circumstances change.

This section helps leaders and boards understand when reorganization may be appropriate, what it can realistically accomplish, and how to determine whether it is the right strategy for their school or network.

[1] In *The Practice of Adaptive Leadership*, Ronald A. Heifetz, Marty Linsky, and Alexander Grashow distinguish between technical challenges, which can be addressed through existing knowledge, procedures, or authority, and adaptive challenges, which require collective learning and changes in assumptions, behaviors, relationships, or priorities (Harvard Business Press, 2009).

The Human Impacts of Reorganization

For a school leader or board member, even raising the question of reorganization can feel like an admission that something is not working or a threat to a legacy they have built. That discomfort is a healthy and normal part of stewardship, not a sign that something has gone wrong. Naming this tension early and giving yourself and your board members room to sit with it tend to produce clearer thinking than treating reorganization as a purely strategic or technical exercise.

Consider reorganization at key strategic decision points.

Leaders and boards should consider reorganization at several natural decision points:

- **As part of periodic strategic planning.** Evaluate whether the current organizational model remains the best way to achieve your mission, considering reorganization alongside expansion, replication, program changes, and other strategic options.
- **As part of annual planning.** Revisit key assumptions about the school's or network's performance, financial outlook, leadership, and capacity to determine whether reorganization or another strategic path warrants consideration.
- **In response to external changes or opportunities.** Consider whether shifts in funding, policy, facilities, community needs, or interest from a potential partner create new opportunities or challenges that warrant exploring reorganization.
- **Before beginning a search for a new leader.** Determine whether the organization should continue in its current form before committing to a successor. The leader profile depends on that answer, and a transition is one of the few moments when reorganization does not require displacing a sitting leader.

You should also consider how the timing of these conversations intersects with key external milestones, including when performance results become available and where the organization is in its charter review or renewal cycle. These factors may affect eligibility for reorganization under your authorizer's policy and how much certainty an LEA has before investing significant time and resources in exploration. For example, the third year of a five-year charter review cycle is a useful checkpoint: By then you can see whether you are on track to remain eligible for reorganization and still have enough runway to act.[2]

[2] The ASPIRE Policy & Technical Guide establishes that schools earning a Level 5 designation will be immediately considered for charter revocation. Additionally, starting in SY29–30, DC PCSB may consider charter revocation for schools with Level 4 designations in any three of the previous five years. DC Public Charter School Board, *ASPIRE Policy & Technical Guide, School Year 2026–2027* (2026), https://dcpcsb.egnyte.com/dl/q36q6hXjkkJ7.

Guide reorganization discussions with a clear strategic rationale.

Reorganization can advance a range of strategic objectives, but it also involves meaningful risks and trade-offs. Many costs, including legal fees and consulting support, are incurred up front, while potential benefits are neither immediate nor guaranteed. Financial efficiencies may take time to realize, and successful implementation requires sustained leadership attention, investment, and change management. Leaders and boards should weigh costs and benefits when defining what they hope to achieve and determining whether reorganization is the strongest strategic response. Organizations may pursue reorganization to:

- Expand or improve educational opportunities for students.
- Preserve high-quality schools or programs.
- Increase organizational impact or reach.
- Strengthen long-term organizational sustainability through economies of scale (e.g., by optimizing facility or other resource utilization).
- Support intentional leadership succession or organizational continuity.
- Combine complementary strengths, expertise, or resources.

Given these trade-offs, leaders and boards should discuss and agree on their strategic rationale for reorganization before moving into active exploration.

To do this, first define the objectives the organization is trying to achieve, what opportunity it is seeking to pursue or what challenge it is trying to address, and how those objectives connect to its mission and long-term strategy. Then, consider the range of potential pathways for achieving those objectives. In addition to a merger or acquisition, options can include internal improvement or restructuring, expansion or replication, shared services or other strategic partnerships, or continued independence. Compare the potential benefits and trade-offs of each, including:

- Strategic alignment.
- Resource requirements.
- Fit with leadership interest, capabilities, and capacity.
- Expected impact on students and communities.
- Time frame and level of risk and certainty.
- Implications for school accessibility, transportation, continuity of educational programming, specialized services, family choice, and students' sense of belonging.

Leaders and boards should move forward with reorganization as the preferred strategy *only* when their pathway comparison suggests it is a good fit for their school's or network's objectives.

Assess readiness before beginning active exploration.

Once leaders and boards determine that reorganization is a strong strategic option, they should assess whether their organization is ready to move from consideration to active exploration. They do not need to have every question answered at this stage, but they should have sufficient alignment and capacity to invest meaningfully in the process. This assessment could produce a "not yet" or "not in this way" answer, which is a legitimate outcome; no one outside the organization can obligate you to proceed past this point. Assess organizational readiness, including:

- Leadership and board alignment around the strategic rationale.
- Internal skill sets, energy, and bandwidth to undertake a complex, multiyear effort.
- Financial resources and external expertise needed to support exploration.

Leaders and boards should also begin considering what they most want to prioritize or preserve through a potential reorganization. These initial priorities and nonnegotiables will inform the partner criteria developed later in the process.

Start the conversation internally.

There is no single "right way" to start a conversation about reorganization at a school or network. The topic may come up as part of annual or strategic planning, be prompted by an inbound request from an interested partner, or be suggested by a funder or advocate. If you think a conversation is needed and serendipity has not yet worked its magic, consider applying one or more of the following conversation starters:

- **Start with the strategic challenge.** Ask: *What pressures or opportunities could materially affect our ability to serve students well over the next three to five years?* Then explore whether partnership is one possible response.
- **Flip the question by asking what it would take to "stay independent."** Ask leadership and the board to articulate what would need to be true for the LEA to thrive independently and where they have concerns about achieving that.
- **Imagine you get a call.** Ask: *If a strong, mission-aligned LEA approached us tomorrow about a merger or acquisition, what questions would we want answered before deciding whether to explore further? Who would we want to involve in answering those questions?*
- **Run a future-state exercise.** Ask: *What would we want students, families, staff, and the organization to experience five years from now? What structures might best support that future?*
- **Discuss what would make a merger worth exploring.** Rather than debating a specific partner, identify the conditions under which a merger could advance the LEA's mission.

- **Begin with fiduciary stewardship.** For boards especially, ask: *What are our obligations to students and the public if another organizational structure could produce stronger or more sustainable outcomes?*
- **Compare strategic pathways side by side.** Put a merger alongside other options: remain independent, share services, enter a programmatic partnership, grow, scale back, or pursue another form of reorganization. Discuss the benefits, risks, and feasibility of each.
- **Use a trigger-based discussion.** Review objective indicators (e.g., enrollment, finances, academic performance, leadership succession, facilities, talent capacity) and ask what thresholds should prompt consideration of a strategic partnership.

TOOLS, TEMPLATES, AND RESOURCES

- **Reasons To Consider a Merger** — A summary of common strategic rationales for nonprofit mergers to help leaders and boards build their own before exploring a reorganization.

- **Strategic Rationale Template** — A template to clarify what an organization is trying to achieve, why reorganization may be relevant, and how it compares with other potential pathways.

- **Reorganization Readiness Assessment** — A set of guiding questions about an organization, to be answered honestly and out loud before any conversation with a prospective partner begins.

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About Bellwether

Bellwether is a national nonprofit that works to transform education to ensure young people — especially those furthest from opportunity — achieve outcomes that lead to fulfilling lives and flourishing communities. Founded in 2010, we help mission-driven partners accelerate their impact, inform and influence policy and program design, and bring leaders together to drive change on education's most pressing challenges. For more, visit **bellwether.org**.

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