

# CGMI-P Network Partner Implementation Guide

## Methodology

How CMOs, EMOs, and network operators can implement  
CGMI-P portfolio governance tracking across their schools.

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This guide provides CMOs, EMOs, and network operators with everything needed to implement CGMI-P portfolio governance tracking across their schools.

# 1 Who This Guide Is For

This guide is written for charter management organizations (CMOs), education management organizations (EMOs), and network operators — any organization that governs or provides governance support to multiple charter school boards.

CGMI-P is relevant to network operators who want to:

- Track governance maturity across all schools in their network from a single dashboard
- Identify systemic governance gaps that affect multiple schools simultaneously
- Benchmark their network's governance maturity against peer networks
- Designate governance anchor schools that mentor weaker schools in the network
- Prioritize governance improvement resources where they will have the greatest impact
- Demonstrate portfolio-wide governance quality to authorizers and funders

## 2 The Network Governance Challenge

Networks face a governance challenge that individual schools do not: they must maintain governance quality across multiple boards simultaneously. Each school has its own board, its own governance dynamics, and its own maturity trajectory. Without a common measurement framework, network operators have limited visibility into governance quality across their portfolio.

Common failure modes in network governance include:

**Succession planning gaps.** Rapidly growing networks add schools faster than they develop governance talent. Board member pipelines are thin, and the departure of one or two key individuals can destabilize governance across multiple schools.

**Compliance pattern blindness.** Individual compliance incidents appear isolated, but pattern analysis often reveals systemic process failures — the same meeting notice issue, the same policy gap, the same financial oversight weakness appearing across multiple schools.

**Uneven maturity.** Some schools in the network have strong governance; others struggle. Without a common framework, the network cannot identify which schools need support, what kind of support they need, or whether support interventions are working.

**Authorizer risk concentration.** If multiple schools in a network are at governance risk simultaneously, the network's relationship with its authorizers is at stake. Network operators need leading indicators of governance risk, not lagging compliance failures.

CGMI-P addresses these challenges by providing a common governance maturity language across all schools in the network, with portfolio-level analytics that surface systemic patterns individual school assessments cannot reveal.

## 3 What CGMI-P Provides

### Network-Wide Maturity Dashboard

A single view showing the CGMI maturity level of every school in the network. Filter by level, domain, trend direction, or authorizer. See at a glance which schools are advancing, which are stagnant, and which are at governance risk. The dashboard updates as schools complete appraisals.

### Domain Capability Comparison

Compare domain-level capability profiles across all schools in the network. Identify which governance domains are systematically weak across the portfolio. If six of eight schools score Level 2 in D1 (Board Composition), the network has a systemic succession and competency problem that requires a network-level solution, not eight individual school solutions.

### Governance Gap Prioritization

Rank schools by advancement need and proximity to next level. A school that is one gate away from Level 3 is a higher-ROI improvement target than a school that needs to address five gates. The network can allocate governance improvement resources where they will have the greatest impact.

### Network Benchmarking

Compare your network's governance maturity distribution against peer networks. Understand whether your portfolio's governance maturity is in line with, above, or below comparable networks. Identify which domains your network leads in and which it lags.

### Anchor School Designation

Formally recognize Level 4 and Level 5 schools as governance anchor schools within the network. Anchor schools serve as governance mentors for weaker schools — sharing practices, hosting board observations, and providing peer learning opportunities.

## 4 Most Active Framework Domains

While CGMI-P tracks all five domains, three domains are especially valuable for network-level governance management because they surface the systemic patterns that network operators need to see.

### D1 — Board Composition & Competency

Networks can identify systemic succession planning and competency gaps across schools. This is the most common failure mode in rapidly growing CMOs: boards are staffed reactively, training is inconsistent, and the departure of key individuals destabilizes governance at multiple schools. CGMI-P surfaces D1 weaknesses across the portfolio so the network can invest in a centralized board recruitment pipeline, standardized onboarding, and cross-school training programs.

#### Key network-level metrics:

- Board member pipeline depth across all schools
- Training completion rates by school and role
- Vacancy duration and succession plan coverage
- Skills matrix completeness and diversity profiles

### D2 — Governance Processes & Compliance

Compliance pattern analysis across the network surfaces systematic process failures before they become authorizer incidents. If three schools in the network are missing meeting notice deadlines, the problem is likely a shared process gap (inadequate notification systems, unclear responsibilities) rather than three independent failures. CGMI-P identifies these patterns.

#### Key network-level metrics:

- Meeting notice compliance rates across schools
- Minutes timeliness and quality scores
- Policy audit finding patterns (same finding at multiple schools)
- Open meetings law compliance trends

### D4 — Financial Governance & Sustainability

Network-level financial governance benchmarking identifies schools trending toward structural difficulty. A school with declining fund balances, late audits, or limited board financial literacy is a risk to the entire network's authorizer relationships. CGMI-P flags financial governance weakness early enough for the network to intervene.

#### Key network-level metrics:

- Audit completion timing across schools
- Fund balance trends and reserve adequacy
- Board financial literacy scores
- Treasurer engagement and financial dashboard usage

## 5 Anchor School Designation

The anchor school designation is one of CGMI-P's most powerful features. It transforms governance excellence from an individual school achievement into a network resource.

### Eligibility

Schools at CGMI Level 4 (Advanced) are eligible for anchor school designation. Schools at Level 5 (Exemplary) are automatically designated as anchor schools upon achieving their rating.

### What Anchor Schools Do

- **Governance mentoring.** Anchor school board members are available to advise boards at lower-maturity schools in the network on specific governance challenges.
- **Board observation hosting.** Lower-maturity schools can observe anchor school board meetings to see well-functioning governance in action.
- **Practice sharing.** Anchor schools document and share their governance practices — policies, meeting structures, evaluation processes — as templates for the network.
- **Peer learning facilitation.** Anchor schools may host peer learning sessions where boards across the network discuss governance improvement strategies.

### Network Value

Anchor school designation creates a governance improvement multiplier within the network. Instead of the network operator providing all governance support centrally, anchor schools distribute governance expertise across the portfolio. This is especially valuable for networks operating across multiple states or regions, where centralized support may be logistically difficult.

## 6 CGMI-P Activation by Level

CGMI-P capabilities expand as schools in the network achieve higher maturity levels.

Level	CGMI-P Status	What the Network Gets
<b>L1</b> <b>Emerging</b>	Not active	School appears in network dashboard but is not yet contributing meaningful governance data. Network should prioritize basic compliance support.
<b>L2</b> <b>Developing</b>	<b>Tracking</b>	Network monitoring begins. School's domain profile is included in portfolio-level analytics. Gap prioritization and benchmarking data available.
<b>L3</b> <b>Established</b>	<b>Tracking</b>	Eligible for governance peer support within the network. School's data contributes to domain comparison and network benchmarking.
<b>L4</b> <b>Advanced</b>	<b>Active — Anchor eligible</b>	School may be designated as a governance anchor school. Can serve as mentor to lower-maturity schools in the network.
<b>L5</b> <b>Exemplary</b>	<b>Active — Anchor</b>	Automatic anchor school designation. Governance mentor for the network. Requires Certified Appraisal.

## 7 Using CGMI-P in Network Operations

CGMI-P integrates into the governance management activities that network operators already perform. The table below maps common network activities to CGMI-P capabilities.

Network Activity	How CGMI-P Helps	Data Used
<b>Annual Governance Review</b>	Review domain profiles for all schools. Identify which schools improved, which declined, and which domains need network-level attention.	Network dashboard + YOY comparison
<b>Resource Allocation</b>	Prioritize governance support spend using gap prioritization. Invest in schools closest to their next level for maximum ROI.	Gap prioritization ranking
<b>Board Training Programs</b>	Design network-wide training programs targeting the domains that are weakest across the portfolio (e.g., D4 financial literacy workshops).	Domain comparison heatmap
<b>New School Onboarding</b>	Baseline new schools with a Self-Assessment. Set governance maturity targets as part of their network integration plan.	SA baseline + advancement plan
<b>Authorizer Reporting</b>	Include network-level CGMI data in reports to authorizers. Demonstrate that the network is actively monitoring and improving governance.	Portfolio distribution + trends
<b>Board Recruitment</b>	Use D1 skills matrix data across the network to identify which skills are most needed and coordinate recruitment across schools.	D1 practice area scores
<b>Risk Management</b>	Monitor for schools trending downward in governance maturity. A school declining from L3 to L2 is a leading indicator of governance risk.	Trend analysis + alerts

## 8 Designation Requirements & Process

To become a CGMI-P Recognized Network Partner, the following requirements must be met:

- ✓ **Requirement 1.** Network operator has enrolled a minimum of 3 schools in a CGMI-recognized governance program.
- ✓ **Requirement 2.** At least one Guided Appraisal (GA) has been completed per enrolled school.
- ✓ **Requirement 3.** Network governance officer has completed CGMI-P orientation training.
- ✓ **Requirement 4.** Network has established a governance improvement process that references CGMI ratings.

### Adoption Timeline

Step	Activity	Timeline
1	Network completes CGMI-P designation inquiry form	Day 1
2	CGMI reviews portfolio enrollment and appraisal completion status	Week 1–2
3	CGMI conducts orientation session with network governance officer	Week 2–3
4	Network operator signs the CGMI-P Recognition Agreement	Week 3–4
5	CGMI issues designation and activates the network portfolio dashboard	Week 4–5

### Annual Renewal

The CGMI-P designation is subject to annual renewal. Renewal requires continued enrollment of at least 3 schools with active CGMI appraisals. Networks that drop below the minimum threshold retain their designation for one grace period (12 months) to re-enroll schools.

## 9 Frequently Asked Questions

### **Can a network include schools across multiple authorizers?**

Yes. CGMI-P tracks governance maturity at the school level regardless of which authorizer oversees each school. The network dashboard can filter by authorizer, but the portfolio view encompasses all enrolled schools.

### **What if our schools are at different maturity levels?**

That is expected and normal. Most networks will have schools at two or three different CGMI levels. CGMI-P is specifically designed to help networks manage this variance — through gap prioritization, anchor school designation, and targeted resource allocation.

### **Does CGMI-P work with schools in different states?**

Yes. CGMI domains and practice areas are designed to be applicable across all 50 states. State-specific compliance requirements are captured in D2 (Legal & Regulatory Compliance) and adapt to each school's jurisdiction.

### **How does anchor school designation benefit the anchor school?**

Anchor schools receive formal recognition of their governance excellence. They gain visibility within the network, strengthen their board members' professional development through mentoring experience, and contribute to the network's overall governance reputation with authorizers.

### **What is the minimum network size for CGMI-P?**

Three schools. This is the minimum needed for meaningful portfolio-level analytics. Networks with fewer than three schools can still have individual schools pursue CGMI appraisals and receive school-level ratings.

### **Can our network's governance staff see individual school appraisal details?**

Yes, with school consent. The network dashboard shows level and domain ratings for all enrolled schools. Detailed appraisal reports (evidence citations, practice area scores) are shared with the network only with the school's authorization.

### **How does CGMI-P relate to CGMI-A?**

They are complementary. CGMI-A connects schools to authorizers; CGMI-P connects schools to their network operator. A school can participate in both simultaneously. The network portfolio dashboard and the authorizer portfolio dashboard are separate views of the same underlying maturity data.

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### **CGMI-P · Partner Integration**

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