

Tips for Screening a Charter School Board

Thank you for your interest in possibly serving on a charter school board.

Charter school board service is a weighty, yet extremely rewarding, experience.

We have compiled some information to help you find the best board for your unique interests and skills. Each charter school is unique; you should be prepared to put in a bit of legwork to find just the right fit.

What is the time commitment for serving on a charter school board?

This varies from school to school although best practice tells us that the most effective charter school board members give 6-10 hours a month. This generally breaks down as:

- 2 hours per month for board meetings
- 1-2 hours per month for committee meetings
- 1-2 hours for committee work in between meetings
- 2-4 hours per month for ambassador and fundraising tasks

At a bare minimum you will need to be able to commit to monthly board meetings and at least 2 hours of work in between board meetings.

I don't have a background in education; can I be an effective board member of a charter school?

Absolutely! Although an effective charter school board should have some educators on the board (people who really know accountability, have run schools or educational institutions before), the majority of board members should have the skills that the staff of the charter school will never have.

What skills are charter schools looking for when they seek board members?

The priority areas are:

- Financial—both accounting and bigger picture financial management skills
- Real estate—facility identification, negotiation, financing and property management
- Fundraising—especially cultivating individual donors, building a donor base
- Public relations/marketing—especially as it relates to fundraising and community building
- Human resources—personnel policies, salaries, benefits
- Legal expertise—general law as opposed to educational law
- Education—especially accountability, systems, and big-picture administration of educational institutions
- Previous governance experience (non profit or corporate)

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What makes the ideal charter school board member?

- Passionate about the mission
- Time to commit to this important endeavor
- Ability to bring a concrete skill to the board
- Willingness/ability to serve as a governor, ambassador, sponsor and consultant
- Ability to understand the distinctions between governance and management
- People comfortable with at start-up situation
- Ability to ask tough questions

How will I know which board is right for me?

1. Have an initial meeting with the chair of the board or nominating committee.
2. Learn what they are looking for in new board members and ask tough questions.
3. If it seems like a fit, set up a visit to the school to meet additional board members, the head of the school and to see the school in action.
4. Attend a board meeting to see the board in action.
5. Clarify what specifically the board will be looking for you to do.
6. Do some soul searching and make sure you can really give the time and that is needed.



Questions to ask along the way:

Feel free to ask lots of questions about the school and the board. The more information you have the better you will be able to assess whether a particular board is right for you.

Organizational:

- When did the school open? What is the history? Background?
- What are the school's biggest strengths to date?
- What are the school's biggest challenges and how do they plan to address them?
- How does the board know if the school is successful? How is this measured?

Philosophical Alignment:

- What is your vision of a successful school?
- What is the core philosophy driving this school?

Skills and Expertise:

- What are the priority skills that you are looking for?
- How will I help fill those gaps?
- How do you plan to fill the other gaps?

Board:

- How would you describe the board's culture?
- What are the board's greatest strengths? Greatest weaknesses?
- What is the current board size? What will it be like in 2 years? 5 years?
- In the ideal situation what would the board be like in 5 years?
- Is there a written job description for the board?
- What are the most important accomplishments of your board to date?
- What does it take to be a successful member of this board?
- What are three adjectives you would use to describe this board?
- If you could change one thing about the board what would it be?
- What are the most important things that the board will focus on in the next year or 18 months?
- What is the nominating process? What are the steps I would have to go through to be considered for your board?

Time:

- What is the time commitment required for serving on this board?

Information you could request:

- A copy of the school's charter or a summary of the key components
- A job description for the board and individual performance expectations for trustees (if they have it)
- Bios of the current board members

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Top 10 Characteristics of a Highly Effective Charter School Governing Board

1. Passionate, unwavering belief in the charter school's mission and core values.
2. Clarity of collective vision – where the school is and where it wants to be in the future.
3. A firm understanding of the charter promises and a clear, consistent way to measure them.
4. Clarity of roles and responsibilities
 - a. Role of the full board
 - b. Role of individual trustees
 - c. Role of committees
 - d. Role of the Executive Director
5. Demonstration of a clear understanding of the difference between governance and management
6. Focused on results
7. The right structure
 - a. Board size
 - b. Composition
 - c. Committee structure
 - d. Officers
8. Board meetings – focused on strategic questions not just reporting
9. An Executive Director who has the time to assist in the creation of effective governance
10. A strong partnership between the board and the Executive Director, which is built on mutual trust and respect.

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Expectations of a charter school board member

1. Governor

Fulfilling governance functions

2. Ambassador

Reaching out to the community

3. Sponsor

Giving time and money

4. Consultant

Using skills and expertise on behalf of the organization



Tips for Screening Potential Charter School Board Candidates

Finding board members for your charter school can be a nerve wracking experience. Screening candidates is essential. You are “hiring” people to oversee a multi-million dollar enterprise that is responsible for educating hundreds of children. Give it the careful attention it deserves. Remember, much of effective charter school governance is about having “the right people on the bus”. Here are some tips to get you on the road to success.

- **Don’t forget to test for mission fit**—more often than not we feel a bit desperate about finding new board members, and are so excited when someone shows enthusiasm for joining our board that we forget to not only “sell” but to screen them as well. Sure you should be checking for skills, but passionate, unwavering belief in the school’s mission and core values is the most important thing. Make sure to let the board candidate talk about themselves, their motivations for joining the board and their previous board experience to help you determine if they will be a good fit.
- **Screen candidates for qualities as well as skills**—every board member should bring critical, prioritized skills to the board. Some of the most essential skills are financial, legal, human resources, education, fundraising, real estate, previous governance experience, community connections and pr/marketing. But in addition to these (and every bit as important), are essential qualities. These might include: sense of humor, good people skills, good at group process, ability to handle the ups and downs of a start-up, teamwork, no personal agenda, and most of all the **TIME** to commit to serving on this type of board, which may be much more hands-on than other boards they have been involved with. It’s essential that your board make a list of the key qualities you expect your board members to have and to create questions that will help you screen for these qualities.
- **Create a written process of the steps you will take with candidates**
Make sure everyone is clear on the board recruitment process and that all candidates go through the same process.
- **School Leader Role**
Your school leader should play a significant role in board candidate recruitment and screening. Make sure candidates have ample time to meet the school leader and tour the school. Be sure to listen carefully to concerns your school leader may have about potential candidates.
- **When in doubt, road test**
It’s often quite uncomfortable and sometimes difficult to remove a board member. So take the time to do careful screening. Feel free to ask for a “road test”. You

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may consider having a candidate serve on a committee for a few months before nominating them to the board. Or ask them to come to a one time strategy meeting to see how helpful they are in solving a problem using their particular skill set.

Board candidate recruitment check list:

- Create a job description for the board and written performance expectations for individual trustees. Make sure to clearly articulate the time commitment needed.

- Create a written nominating process. What are the steps a candidate will go through?

- Clearly define and prioritize the skills, qualities and diversity you need on your board. Get full board agreement about this.

- Discuss board recruitment with your School Leader and clarify their role in the process.

- Create a tool to help you “rank” candidates (see attached sample).

- Create specific questions that you will ask candidates to test for mission fit, etc. (see attached samples)



Excel Academy Charter School of East Boston
Board Candidate Evaluation Form

Candidate Name: _____ Date: _____
Evaluator Name: _____

1. **RELEVANT EXPERTISE:** Does the candidate have expertise relevant to a board position? Will her/his expertise fill a need unmet by current board members? Has the candidate had enough experience within his/her field such that s/he can make meaningful contributions? Is s/he willing to share her/his expertise as a board member?

Please check only the TWO most relevant areas of expertise:

Strategic planning _____ Senior management/leadership _____ Accounting/finance _____
 Fundraising _____ Legal _____ Marketing/PR _____ Governance _____
 Facilities/Real Estate _____ Education _____ Politics/Connections _____
 Community Representation/Organizing _____

<u>Definitely Reject</u>	<u>Probably Reject</u>	<u>Unsure</u>	<u>Probably Invite</u>	<u>Definitely Invite</u>
1	2	3	4	5

2. **TEAMWORK:** Will the candidate make a good team member? Is s/he open to hearing others' opinions and perspectives? Is s/he sensitive to group dynamics? Is s/he willing to put organizational needs before her/his interests & needs in making decisions?

<u>Definitely Reject</u>	<u>Probably Reject</u>	<u>Unsure</u>	<u>Probably Invite</u>	<u>Definitely Invite</u>
1	2	3	4	5

3. **COMMITMENT:** Is the candidate willing to devote her/his full energy and talent to the board? Is her/his understanding of her/his responsibilities as a board member aligned with our expectations? Does s/he have the time necessary to be an active board member? Even in the face of organizational challenges and difficulties, will the candidate remain committed to the organization?

<u>Definitely Reject</u>	<u>Probably Reject</u>	<u>Unsure</u>	<u>Probably Invite</u>	<u>Definitely Invite</u>
1	2	3	4	5

4. **PHILOSOPHICAL ALIGNMENT:** Does the candidate believe in the mission and purpose of both our organization and the charter school movement? Will s/he make decisions based on alignment with the organizational mission, rather than based on personal needs and considerations?

<u>Definitely Reject</u>	<u>Probably Reject</u>	<u>Unsure</u>	<u>Probably Invite</u>	<u>Definitely Invite</u>
1	2	3	4	5

TOTAL SCORE (out of 20):

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OVERALL IMPRESSIONS:



Skills and Expertise:

- What is your past governance experience? Do you believe the board you served on was effective? Why or why not?
- What work do you do right now? How might this work support the mission of this school?
- What ideas if any do you have to leverage your networks and connections that could benefit the school?
- How might you advocate for the school publicly and privately?
- What would you do if the media or some local groups opposed the school?
- Do you have any past issues or conflict of interests that could potentially interfere with your service on the board?
- Describe a project that you raised money for in the past. What were your goals and what was the outcome?
- I can see many things you would bring to this board, but what do you see yourself bringing to it? What unique contribution will you bring?
- What do you hope to get out of being on this board?

Teamwork & Group Participation:

- What are the characteristics of effective groups?
- What qualities make some boards more effective than others?
- What do you see as the role of the ideal board member?
- When you are in a professional group, do you often change your mind on an issue about which you feel strongly? Can you think of any examples when this did or didn't happen?
- If your personal views were to come into conflict with a decision of the board of the school, what would you do?
- Would you be willing to make a financial contribution that was meaningful to you and the school if you were a member of the board?
- Describe an experience in which you had leadership responsibilities with a group. What worked? What did you learn about yourself?
- Describe your ideal approach to resolving conflict.
- Describe a situation in which you had a conflict with a team member, employee, or manager. What strategies did you use to resolve the conflict?
- Working on a board requires close teamwork among a group that is likely to bring diverse backgrounds and experiences. Can you describe an experience in which you worked with such a team? If not, how does this opportunity strike you?

Time and Energy:

- What projects are you passionately committed to right now?
- What is your current work? How is it going? What do you like and dislike about it?



- Are you willing and able to commit at least ten hours a month to a cause you feel passionately about? Can you think of a recent example where you did just this?
- Do you have any other non-profit commitments that might be a higher priority than your work on the school? If so what are they?
- How many board positions do you currently hold? What conflicts would your service to this Board present?

Philosophical Alignment:

- Where do your children go to school? Are you satisfied? Why or why not?
- What is right/wrong with education right now?
- What would you never want to see in this school?
- What is a charter school?
- What do you like and dislike about the charter school idea?
- Do you think that we should hold children from poor urban backgrounds to college preparatory academic standards?
- What do you believe about charter schools? Do you think they are good or bad for public education and the children they serve?
- Do you think public schools should be in the business of teaching character and civic education? Do you think that urban middle school students should be required to wear uniforms and be expected to learn in a highly structured and disciplined environment?
- What is the primary purpose of public schools?
- Describe your vision of an excellent public school?
- Why do you think so many inner city kids are not succeeding academically? What is needed to address these causes?
- Tell me about an experience or achievement from your own schooling that was particularly powerful for you?
- For the school we've discussed, 10 years from now, how would we know if it had been successful? What kind of measurable or appreciable results might we see that would have us know we had succeeded?

