



Promoting Quality
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Governance

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**Audubon Center
of the North Woods**

Onboarding New Charter School Board Members

Why onboarding?

Charter school boards in Minnesota hold elections for board members annually, and among those elected are teachers, parents, and community members whose service to the board in this role is a new experience for them, as well as individuals who previously served in this important role. These new board members, those who previously served as board members, and those board members' whose terms will continue until their end dates comprise the school board for at least the next year. It is to be expected that the knowledge and experience levels may vary considerably among new, experienced, and continuing board members.

Initial and ongoing board training for all charter school board members in Minnesota is mandated under MN Stat. 124E. It states, in pertinent part:

Subd. 7. **Training.**

Every charter school board member shall attend annual training throughout the member's term. All new board members shall attend initial training on the board's role and responsibilities, employment policies and practices, and financial management. A new board member who does not begin the required initial training within six months after being seated and complete that training within 12 months after being seated is automatically ineligible to continue to serve as a board member. The school shall include in its annual report the training each board member attended during the previous year.

This required training is a critical part of the onboarding activities that new and continuing board members participate in, but it does not cover the gamut of important information that new board members need to “ramp-up” their contributions to the board’s work in a timely and effective manner. How do new board members acquire that information? Through an intentional, specific, and comprehensive process known as “onboarding.”

This paper is not intended to be legal advice. Please check with the school’s legal counsel and / or relevant Minnesota state statute for additional information.

What is onboarding?

Onboarding is another more inclusive term for “orientation” or “induction,” and is basically a process through which new board members acquire the information they need, when they need it, in order to perform as constructive and effective board members. The required initial board training topics, under MN §124E, are included as part of the onboarding process, but these alone cannot prepare the board members for the specific work of their school’s governance.

Onboarding is another, more inclusive, term for “orientation” or “induction.”

It is often reported that while this training is important, helpful, and meets the statutory requirements of initial board training, the training is not school or site specific. Attendees at these training sessions generally represent a number of charter schools, rather than just the board members of a single school.

While the mandated training provides new board members with up to date information of a general nature, it does not address the uniqueness of each charter school community, its culture, past practices, norms and values, and other important characteristics. Effective board members need to understand the complexities of the school, the opportunities before the school, the challenges the school faces, the school’s history and “track record,” for example.

Onboarding activities are intended to supplement or enhance the more general information provided in required training by applying that information to the local school site, and by providing information as indicated above that is not provided in the required training.

Options for Onboarding New Board Members

ACNW chartered schools use a variety of methods to onboard their new board members. Included below are examples of the methods being used.

1. Mentoring

Mentoring is a process whereby a veteran board member either volunteers or is assigned to become the “go to” person for one new board member. They provide one-on-one coaching, information as requested by a new board member, and information determined by the board that should be imparted to new members in a one to one setting. This allows for detailed discussions to occur rather than being a session where information is disseminated but not discussed in any detail.

This format is a bit ad hoc in that the topics of discussion are mostly, but not entirely, determined by the experienced and the new board members. Successful boards also specify for the mentors the “required” topics that should be discussed between the mentor and the new board member.

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Options for Onboarding New Board Members

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2. Board Manual

In this process, the board, with the assistance of the school director, creates a manual for new board members, either in hard copy or in electronic format. This document is intended for board member use only, but since it is a public document it is available to the public as well.



Included in the board manual is information about all of the topics mentioned above, including:

- the uniqueness of this charter school community,
- its culture, past practices, norms and values, and other important characteristics, along with information about the complexities of the school,
- the opportunities before the school,
- the challenges the school faced in the past and may be facing now,
- the school's history of success and
- its overall track record.

The board manual should also include foundational documents, such as the school's bylaws, most recent annual report, charter contract, and policy manual. Board manuals may have many different types of organization which may, or may not, serve as a useful and effective stand-alone resource to the new board members. Blending this resource with a Board mentor or specific board training can enhance the effectiveness of a Board manual.

3. Board Meeting Training Calendar

A board meeting training calendar is used by some ACNW authorized schools to specifically map out the full board's ongoing training activities for the year, as required under MN Stat. 124E. Board training does not need to occur at board meetings; however, those times are one of the best ways to ensure that all or most board members meet their required annual ongoing training requirement and at the same time to interact with their fellow board members about the training topic and how it affects the school.

Some board meeting calendars also list the training topics of specific interest to the board as a means of providing "onboarding" type of information to new board members, within the context of the full board being present and engaged in the training and the related discussions. These activities can also serve as refreshers for continuing board members and can be especially valuable opportunities for the board and its newcomers to have a common understanding of the issues on a variety of topics, past and future.



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4. Blended

A blended onboarding process is just what is implied by the term...one or more of the above processes are incorporated into a blended onboarding process. In a full blended onboarding process, for example, each new board member is assigned as a mentor and serves the role described above; a board manual is used as the “curriculum” for board training of new board members, and a board training calendar is developed by the board and is executed with fidelity.

Included in a blended approach could also be the following:

- A. A series of informal meetings among new board members, the board chair, and the school director where information is reviewed and discussed in order to clarify roles and responsibilities, understand requirement, and to consider options.
 - B. A series of informal meetings among new board members and a sub-committee of the board, sometimes known as the “onboarding committee.” The process here is similar to the above, except a group of board members rather than just the board chair and the director participate.
5. There are undoubtedly other means of onboarding new board members who join a charter school board and it might be helpful if, as you interact with leaders from other ACNW authorized schools or others, that you ask the question “How do you onboard your new members?” Useful information may come your way that will provide the basis for initiating or improving on the new board member process used by your board that will be of benefit to your new board members as they arrive.



Suggested Onboarding Topics

Suggested Topics/Materials for Onboarding New Board Members

- A. Board Bylaws
- B. MN §124E Charter School Law
- C. MN §13D Open Meeting Law
- D. MN §317A Non-Profit Organizations
- E. Current board approved school calendar
- F. Current board approved board meeting calendar
- G. Board approved policies and procedures
- H. A listing of current board members along with their contact information
- I. Current year financial audit
- J. Current year board approved operating budget
- K. A complete set of recent monthly financial documents, including but not limited to cash flow, budget/actual enrollment, budget/actual revenue and expenditures, balance sheet, check register, etc.
- L. Three months of board meeting packets, including agenda, meeting materials, and meeting minutes for each meeting.
- M. Building Company organizational documents and current budget, if applicable
- N. Building lease
- O. Faculty and staff list
- P. Faculty and staff salary and benefit charts/policies
- Q. Employment agreement for the school leader
- R. Most recent board evaluation for the school leader
- S. Recent school newsletters and other publications
- T. Contracts for services: auditor, financial services, special education
- U. Other Contracts not otherwise specified
- V. Pending legal matters that involve the school
- W. Official designations, attorney, newspaper, etc.
- X. Curriculum design in abbreviated form
- Y. Information about parent groups that support the school
- Z. Other information identified by the board.



Onboarding New Board Members

New charter school board members usually come to the job with limited experience as a member of a public body. They often have limited knowledge of or experience with the types of responsibilities that are central to successful charter school boards. Despite having experience perhaps in law, finance, facilities, or human resources, it is likely they have not applied that experience in a public school board setting. This lack of knowledge and experience with serving on a board, public or private, reinforces the legislature's mandate that all charter school board members participate in initial and ongoing training relative to topics associated with their responsibilities as a school board member.

General training topics specified in MN Stat. 124E serve as a starting point for the education of new school board members; however, that training needs to be supplemented and enhanced with learning opportunities that apply the general training to new board members' specific school, and also provides information about the uniqueness of their charter school community, its culture, past practices, and norms and values. Effective board members need to understand the complexities of the school, the opportunities before the school, the challenges the school faces, the school's history, and its track record, for example.

Effective, timely, and thorough onboarding of new board members can contribute significantly to the early and sustained positive contributions of new members to the board's overall success in providing leadership that allows the school to thrive by successfully meeting its mission, and then some! Successful boards pay attention to the onboarding process and consistently follow-through on planned and scheduled onboarding activities.

