



Promoting Quality
Charter School
Governance

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**Audubon Center
of the North Woods**

Charter School Director/Leader Succession Planning

Background

All charter school boards desire for their schools to be led by a well-qualified and highly competent and successful school leader who is committed to serving the school in their leadership roles for an extended period of time. Lengthy service by school leaders can provide stability and the establishment of desired cultural norms and successful administrative processes and procedures. In addition, the school community, over time, can gain and maintain confidence in the school leader and her/his commitment to the school and to the community.

The definition of “lengthy service” is likely not universal among school boards. For some, three years might seem to be adequate, while other boards may desire five, seven, ten, or more years as adequate to be considered lengthy service. Whatever length of time a board might use for that definition, the one thing that is certain in all cases is that all school directors will leave their positions eventually.

In most cases the reasons a school leader leaves their position are unrelated to the school or the school board and may not be predictable in terms of timing. In some cases though, such as retirement, the board may have advanced notice of the leader’s departure and can plan a timely process to acquire the services of a high quality replacement. However both cases, either where the school leader gives advance notice of her/his departure or the one that occurs abruptly, call for charter school boards to have at least a tentative plan in advance of the event’s occurrence that will allow for a smooth and non-disruptive transition from one school leader to the next school leader. The succession plan, thought of and developed well in advance of its need, will be of great benefit to the charter school board when the situation arises. This plan can then be implemented and/or modified by the then sitting board when the departure of the school leader has been announced or when it abruptly occur.

Succession Planning

Some reasons charter school leaders leave their positions include:

1. Retirement
2. Family Relocation
3. Illness/injury of the leader or family member
4. More attractive career opportunities elsewhere
5. Dissatisfaction with current position or relationships
 - a. Feelings of lack of support
 - b. Performance evaluations
 - c. Compensation/benefits
 - d. Other reasons

In the case of a school leader leaving her/his position based on dissatisfaction as indicated above, or for other similar reasons, the board should take stock of its relationship with the school leader on an ongoing basis to head off such departures where possible. Often candid and open communication between the leader and the board can resolve any issues prior to their reaching the point where the school leader decides to leave.

Succession Planning

There are no Minnesota statutory requirements for charter school leader succession plans. A charter school board can wait for the circumstance of their school leader's departure and then rapidly develop and implement a process to locate a replacement for the school leader with the desired qualifications and high level of competence. A better scenario is for the charter school board, well in advance of a school leader's departure, to engage in respectful, thoughtful deliberations, and come to agreement about the processes and procedures it will use when the situation of the school leaders imminent or actual departure arises. In so doing the board will do its best to ensure a smooth, non-disruptive and timely transition from one school leader to another, all to the benefit of the school and the students/families the board serves.



Elements of a Charter School Leader Succession Plan

Director succession plans can and should be tailored to the individual school community in which the school is located with intentional consideration being given to its history, social norms, and expectations.

A director/leader succession plan should include (or at least consider) the following actions:

- Development of a board-approved director succession plan policy. The policy should include definitions of what specific terms mean. Definitions help to prevent misunderstanding.
- Establishment of a process and timeline: what should happen and when will it happen?
- Schedule and hold a board meeting in public to discuss/implement director/leader succession plan
- Appointment of an Interim Director/Leader
- Coordination of the search process, possibly including the hiring of a firm or individual to coordinate the search process, and development of a detailed timeline and plan of activities (e.g. interviews, background checks, etc.)
- Advertisement of the position's availability and requirements
- Implementation of the plan developed by the firm or individual tasked with coordinating the search process
- Hiring of the director/leader, including establishment of a Director/School Leader Entry Plan and a plan for professional support for the new director/leader.



Sample Charter School Leader Succession Plan

World Learner School

(an ANCW authorized school – www.wlschaska.org)

POLICY: 115 Director Succession Plan

EFFECTIVE DATE: 11/23/2015

REVISED DATE: 10/22/2018

PURPOSE

The purpose of this policy is to establish an orderly, thorough and comprehensive process to respond to the departure of the school's Director, and to transition the school's leadership in a manner that is minimally disruptive to its daily operations and to its continued success.

GENERAL STATEMENT OF POLICY

The Director succession policy recognizes the importance of continuity in the school's leadership and it further recognizes that school leadership can change over time, for a variety of reasons. Some changes can be anticipated well in advance, such as when a Director announces his/departure, for retirement or other reasons, and the announcement is made months in advance of the Director's actual departure date. Other changes in leadership can be required with little or no advanced notice or in a somewhat abrupt manner such as in the case of unfortunate accident, serious illness, or even death of the Director.

DEFINITIONS

A. Succession Plan

A succession plan is a board adopted plan of action that is initiated upon notice of departure of the school's Director. It is detailed enough to result in a smooth, effective, and minimally disruptive transition of school leadership.

B. Qualifications

Qualifications are the skills, specialized training, education degrees, years in practice, personal qualities and characteristics or accomplishments that are specified by the school board as either essential or desired in candidates for the position of Director for the World Learner School. Essential qualifications are those that are required of all candidates who will be considered for the position. Candidates not possessing the essential qualifications will not be considered. Desired qualifications are those that the board believes are important assets for candidates to have, but candidates without one or more desired qualification will still be considered for the position, as long as they possess all of the essential qualifications for the position.

C. Acting Director

An acting Director is a person appointed by the school board to serve in the role and capacity of Director for a temporary period of time, usually to fill the time between the departure of the Director and the arrival of a new Director; or, if the Director is incapacitated and will not be available to carry out his/her duties for a period of time. The acting director has all of the responsibilities and authority of the Director during the time he/she serves in that role. *Continued on p. 5.*



SUCCESSION PLAN PROCESS AND TIMELINE *Continued from p. 4.*

- A. Upon receiving notice of the Director's incapacitation or imminent departure from the school, the school board shall meet at a special or regular meeting to review and if necessary modify the current succession plan (this is a necessary step since the time between the original adoption of the Director succession plan and the event requiring its implementation may be several years or more and it likely that the school board will be comprised of members, some of whom at least will not have familiarity with it and they deserve the opportunity to update the plan to adjust it to the then current reality of the school.)
- B. The school board will appoint an acting Director to serve until such time as the incapacitated executive returns to assume his/her duties, or a new Director is hired and is ready to begin his/her duties. Acting Director candidates can be identified in advance of their being needed from either current or former school staff or other education leaders in the community.
- C. In the case wherein the Director is leaving the school and a replacement Director will be hired, the board will review the current Director's job description and make desired changes to it, if any; and, will review and affirm the qualifications identified in this policy as being essential or desired.

A contracted leadership personnel specialist, under the direction of the board, may carry out the search process for a Director or, the board can conduct its own search process using the skills and talents of board members to do so. It is recommended that, as a minimum, the board consult with other charter school boards about their experiences in this important area and to also consult with professional associations, including their authorizer, for advice and direction.

- D. The Director vacancy will be advertised through the following channels and others as deemed appropriate by the board:

Minnesota Association of Charter Schools
Montessori professional organizations and journals
Local and state media
Others as determined to be useful

The position will be advertised for a minimum of 30 calendar days during which time the board will organize the process for:

- A review of candidates' credentials
- Initial interviews of candidates whose qualifications/credentials seem to most closely match the required and desired qualifications for the Director
- Reference Checks
- Final interviews/meetings
- Appointment of new Director
- Entry Plan for the new Director

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World Learner Montessori School Qualifications for Director

The board will make a final determination of the Essential and Desired Qualifications for the Director at the time of this policy's use. Below is a sample that the board may modify or add to as it wishes at that time.

I. Essential Qualifications:

Training and/or demonstrated skills in:

- A. Instruction and assessment
- B. Human resource and personnel management
- C. Financial management
- D. Legal and compliance management
- E. Effective communication; and board, authorizer, and community relationships

II. Desired Qualifications:

- A. Master's Degree in Education or related field
- B. Five or more years of Montessori School teaching or administrative experience
- C. Accredited AMI or AMS training

