Extending Charter Impact: A Series

Roles for Executive Leaders and Boards in Extending Charter Impact

When charter school/network executive leaders consider growth, one first step is to determine whether the school or network is in fact *ready* to grow. There are several questions that executive leaders can ask themselves to help make this assessment. Once a school/network has determined it is ready to grow, another important first step is to establish a clear and thoughtful division of responsibilities between the executive leader and the board for charting *how* the school/network might grow.

In our work with charter schools/networks, we often see executive leaders and boards of directors who are uncertain about how to make a decision to grow, and the role that the board should play in approving a plan to grow. If decision-makers are not aligned up front about respective roles and responsibilities, schools/networks may either skip important steps or duplicate work unnecessarily.

Moreover, without clear roles and responsibilities, school leaders and boards can miss opportunities to identify and discuss areas of disagreement or misalignment — discussions that are often some of the richest learning experiences. If a board member has a dissenting opinion, a strong understanding of roles and responsibilities can help ensure that those perspectives don't get lost and are raised with the right decision-makers at the right time.

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Executive leaders and their boards should lean into candid conversations to explore these different perspectives, as diverse groups are more likely to make innovative, boundary-pushing decisions. In fact, sharing divergent thinking and working through thorny challenges can create opportunities for learning and alignment between executive leaders and boards.

Does the planning process have a blind spot? Is it missing a nuanced perspective on issues of diversity, equity, or inclusion? Are there aspects of the growth plan where the analysis is not as rigorous as it should be? What is at the root of the disagreement, and how can it be resolved in a way that honors diverse perspectives?

At the same time, clear lines of responsibility are essential for balancing a board's role in governing the school and shaping its vision with an executive leader's responsibility for thoughtful planning and successful execution.

There are neither any hard-and-fast rules for how the growth planning process plays out nor hard-and-fast rules for growth itself. But this resource (*see page 2*) can serve as a discussion-starter for executive leaders and their boards, and help them avoid some common missteps and make the best decisions possible.

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Suggested Roles for Executive Leaders and Charter School Boards

Activity	Role of the Executive Leader	Role of the Charter School Board
Initiate a growth planning process to determine how the organization might grow (when, where, how, and how much)	With the Board Chair, recommend processes (sometimes including external strategic, facilities, and/or legal support) to make decisions about growth. This should be in the context of the organization's broader decision-making about long-term strategy. This process should be inclusive of family, community, staff, and board voices.	The Board Chair works with the school/network executive leader to design the process for making decisions about growth. At this point, the chair may also decide to appoint a growth or strategy committee to advise the staff and board on the steps outlined below.
Seek family, student, and community input	Work early and thoughtfully with parent organizations and board members to seek family, student, community leader, and funder input about whether and how to consider growth, including engagement on key questions of where, how, and how much to grow.	Support school/network engagement of parents, families, funders, and community leaders. Board members who have children enrolled in the school can play an especially critical role in engaging with families about potential growth.
Determine criteria organization will use to decide whether to grow	Propose "greenlight" criteria that help the organization decide whether and when to grow. Criteria should define what must be true about academic, operational, and financial performance before a school/network considers growth.	Approve "greenlight" criteria the organization will use to determine whether to grow.
Develop a plan to pursue growth	Define a plan for where, when, how, and how much to grow, working in partnership with board members, families, and communities to seek input and feedback throughout the process. Continue to be open to the possibility that the answer may be "do not grow".	Provide input (via Board Chair or growth/strategy committee) throughout the plan development process. Continue to be open to the possibility that the answer may be "do not grow".
Approve plan to pursue growth	Recommend plan.	Review and approve the plan.
Implement plan for growth	Manage and implement the growth plan, including continued engagement with all key stakeholders. Track and monitor the team's work on the plan. Initiate and lead stakeholder engagement to support growth plan implementation.	Monitor progress against the plan using a board-level dashboard, which should include key milestones tied to the greenlight criteria. Pay attention to the need to revisit the growth plan if something goes wrong or does not progress as planned. With the executive leader, meet with key stakeholders (authorizer, etc.) to support growth plan implementation, including leveraging existing relationships to support growth.