

CharterBoardPartners

great boards for great schools

Case Study

America's Promise PCS is a K-5 school in its eighth year. The founding School Leader, Alice, has been in her position since the opening of the school. However, she has never been formally evaluated by her board. Currently the board has four founding members and five new members. The new members have not received a formal orientation process and are in various stages of familiarity with the board and the school. There is no committee structure in place, and many of the new members do not yet understand where they will be able to contribute.

It is mid-October, and the new school performance reports have just been issued. The board is dismayed to learn that the school's ranking has dropped significantly. The Board Chair, Jack, circulates an email informing the board that not only has their ranking dropped, but he has also received a message from the local authorizer requesting a board-to-board meeting to discuss the school's dramatic dip in performance. In the same email, Jack tells the other board members that he would like to call an emergency board meeting to address this topic, though they are not scheduled to meet again for a month. He also writes in the email, "we have to address this issue swiftly and aggressively, and consider all factors here, including whether or not we have the right person leading the school at such a critical moment." Alice is not included on the email.

After the email goes out, alarm quickly spreads among the board members. The new members are especially concerned—they just joined this board, and now they find themselves confronted with a serious issue right from the onset of their board tenure. Are they really prepared to weigh in on the best course of action to take, or evaluate whether Alice is a capable leader? The founding members feel dismayed that this happened on their watch. What were they doing wrong? How can they figure out what to do about the decline in school performance? Morale is low and anxiety among the members is extremely high as the group heads into the emergency board meeting.

Questions:

1. What are the key challenges here?
2. What best practice structures or processes would help the board make such a critical decision?
3. What would you do if you were supporting Alice and this board?

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Case Study #2 (Standards 4-6)

America's Future PCS has been in existence for four years, and has gone through three school leaders since the school opened. The current School Leader, Mary, is in her second year on the job. The board is comprised of nine members, five of whom are founding members.

America's Future, while performing fairly well academically, struggles financially. The latest audit raised flags for the second year in a row, and the school is operating at a budget deficit for the current school year. The authorizer's annual audit report, which was just released, cites "financial mismanagement" at the school and expresses "grave concerns about the long-range viability of America's Future PCS."

Upon receiving this report, the Board Chair, Linda, is exasperated. She has been telling the other board members for some time now that she thinks Mary's business manager is incompetent. For Linda, this is the last straw and she arranges a call for the members of the Finance Committee to discuss this situation. After their conversation, Linda sends an email, copying the Finance Committee members, to the business manager, Paul, informing him that they are very concerned with his job performance and requesting that effective immediately, they receive a Friday report from him detailing his weekly activities. As soon as he receives this email, Paul goes to Mary in a panic—is his job in jeopardy? Does he really have to start preparing weekly reports? Furious, Mary calls Linda to express her frustration that the board is "going around her" to reprimand and supervise her staff. Linda is unapologetic, so Mary takes it a step further and fires off a long, angry email to the entire board. She tells them that Paul is her staff to manage and that, furthermore, she is handling the situation with the finances and they should back off. She ends the email by requesting time on the next board meeting agenda to discuss this, writing: "if this is the way the board chooses to do its job, then I am not sure I can continue doing mine."

As the board prepares for the next meeting, opinions are split as to whether Linda was right to take the steps she did. New members, feeling caught in the middle, receive individual phone calls from Mary in which she pleads for their support and expresses her frustration with what she views as an ongoing problem of "overstepping." The board heads towards the next meeting facing a potential standoff between the School Leader and the Board Chair.

Questions:

1. What are the key challenges here?
2. What best practice structures or processes could help improve this situation?
3. Were Linda and the Finance Committee members justified in their actions?
4. What questions should the board members ask as they talk through this situation?
5. What should the board do next?
6. What would you do?