

Succession Matters: The Time for Succession Planning is Now



Succession Planning

Florida Charter School Conference
Thursday, October 20, 2022
1:45 pm - 2:45 pm

Free **expertise and resources** to help public charter schools thrive.



Introduction



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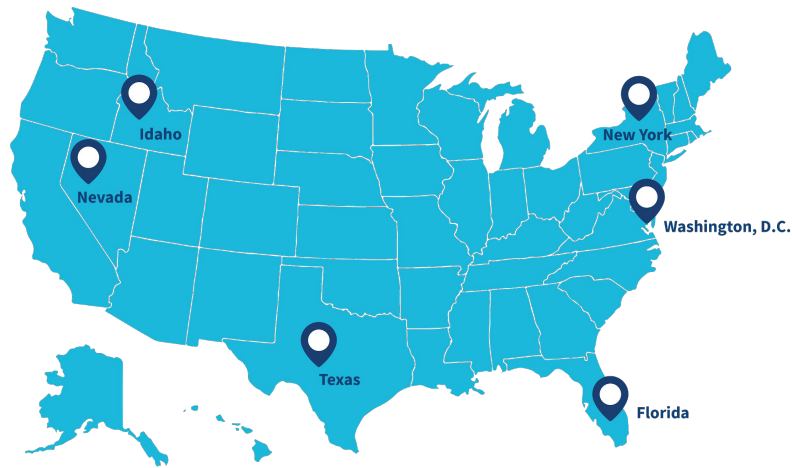
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The Charter Support Unit is here to help charter schools thrive.

National Scope, Local Expertise

Every public charter school across America operates in a slightly different environment. But the priorities are the same wherever you are: serve students well, operate responsibly and sustainably, deliver value for families and taxpayers. The Charter Support Unit's no-cost resources and expertise can help your school achieve those essential goals and many more.

The CSU is here to help charter schools nationwide. With focused expertise in **Florida, Texas, Upstate New York, Washington DC, Nevada and Idaho** and **Rural communities**, we meet your needs from coast to coast.



Florida Charter School Governance Training

<https://charterschoolsupport.com/>

Why is this Important?

- Choosing a school leader is one of the most important decisions
- Not having a plan in place can negatively impact school morale & school achievement
- Represents an ongoing commitment to a school's sustainability



Who's Responsible?

- The Governing Board is ultimately responsible for ensuring there is a plan in place
- This should be a part of the Governing board's continuous work



Goals of a Succession Plan

- Identify the key roles of the organization
- Create a transition plan for leadership change
- Develop staff from within the organization to fill leadership roles



Operational Planning

- Succession planning does not just address the loss of a leader
- Governing Boards **MUST** understand key roles and responsibilities of key positions
- Governing Boards should consider how does the organization build leadership from within
- How are we training future leaders and individuals for other key roles





Start with a Strong Foundation

Job Descriptions

- Establish Job descriptions for key roles
- Identifies skills and positions necessary for each position along with qualifications
- Serves as the foundation for the work of each employee
- Review regularly to ensure the job description matches the expectations of the position

Organizational Chart

- Provides the internal structure of hierarchy within a school
- Provides clear picture of the chain of command, communication and authority from the top down
- Important to determining who will carry out various tasks in the event of transitioning leadership
- Useful in creating contingency plans in case of absence of key positions



Board Composition & Assessment

Founder's Syndrome: Board member turnover may happen when a school leader leaves

- Identify the key skills the Board feel are essential to have on the Board
- Compare the essential list of skills with the skills of the current Board
- Areas not already identified in current members may be areas for recruitment
- Professional development for the Board also helps build their skill sets



Operating Manuals in Place

Policy Manual:

- Serves as the Governing board's instructions on how the school should operate
- Ensures Compliance with laws and Regulations
- Helps provide guidance during leadership transition

Standard Operating Manual:

- Provides clear guidance on the “how, when and who” tasks are completed in line with with Policy Manual
- Best Practice: Have key employees complete Job Task Analysis Form

POLICIES

PROCEDURES



Develop the Plan

Day 1 Day 2 Day 3
##

PLAN

Step 1

Research

Step 1

Step 2

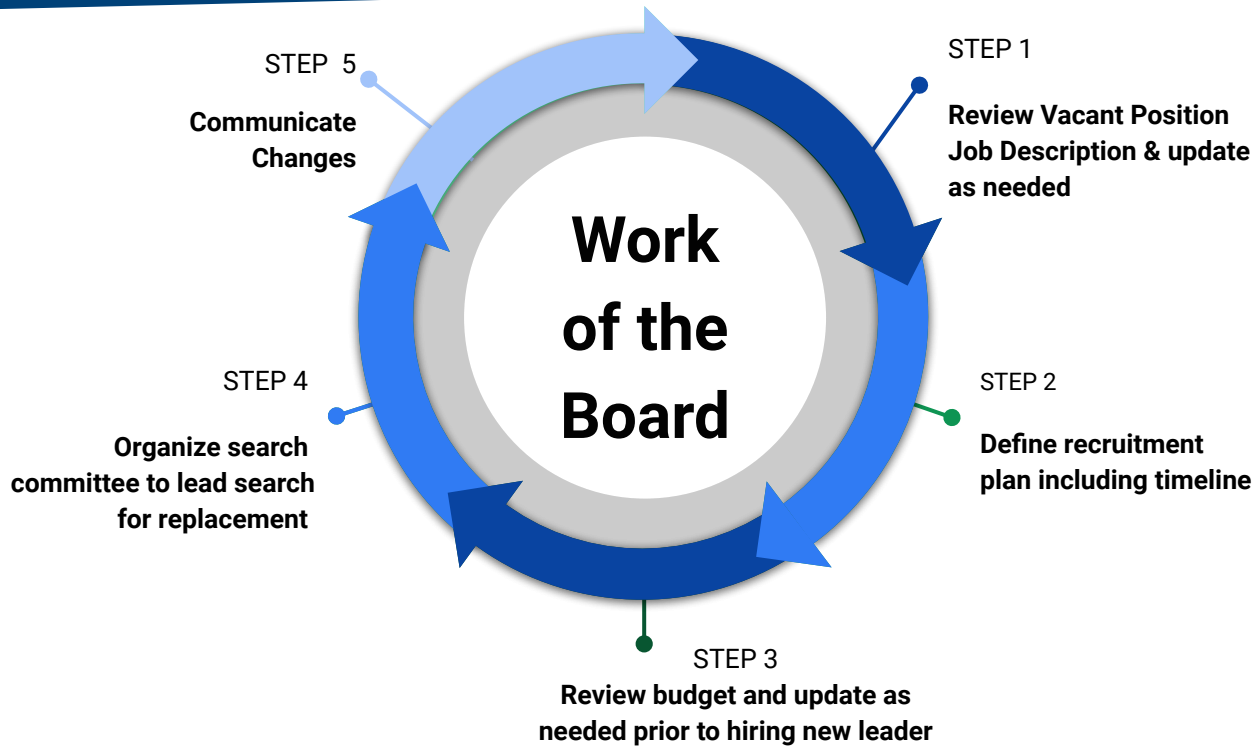


Utilize a Board Committee

- A Succession Plan a comprehensive process!
- Creating a special committee to help address all elements of Succession Planning
- The committee can include various members other than Board members



Work of the Board



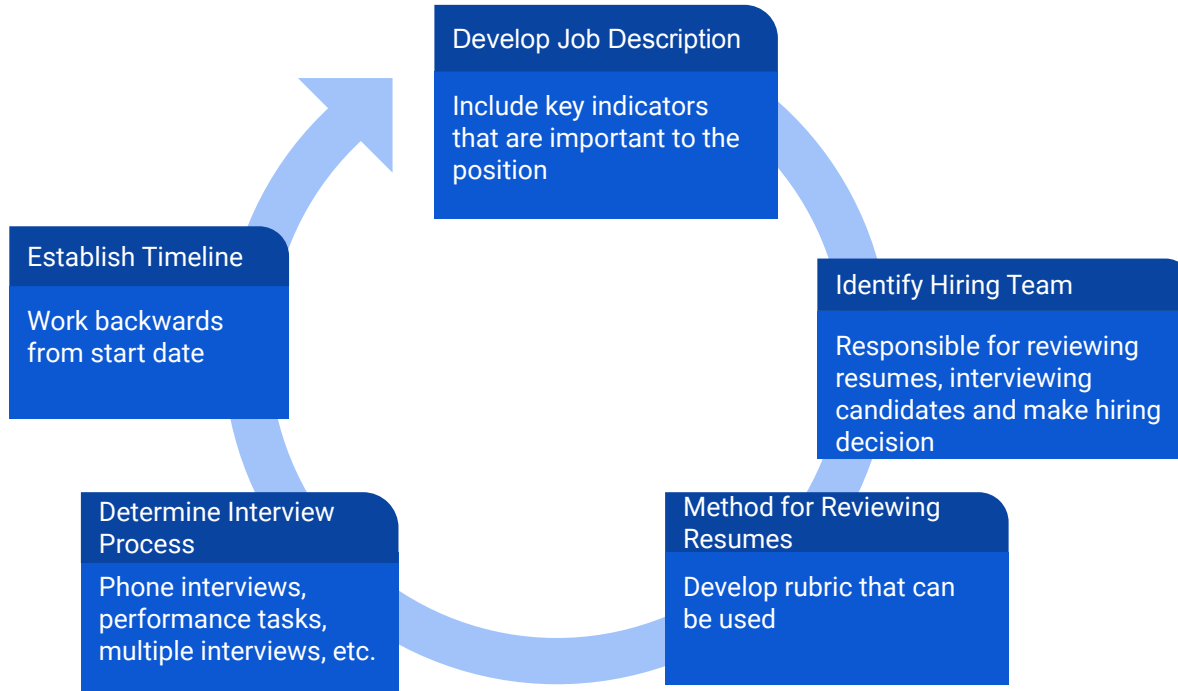
Short-Term Plan

- Often a result of an unplanned absence or vacancy
- Can also be a result of an extended absence such as maternity leave
- Utilize pipeline of internal talent to fill short term position

Long-Term Plan

- Ideally allows for 12 months to plan for transition
- Include all stakeholders
- Complete analysis of position and needs of school to determine key characteristics and traits of new leader

Hiring Process...



Test the Plan



Implementation

Implement the Plan

Test plan while current leader is on vacation

Have current leader provide scenarios for interim principal to walkthrough or answer questions

Reflect

Use this time to debrief

Discuss what went well as well as areas for improvement

Adjust as Needed

Based on findings from the debriefing, adjust plan as needed.

Develop framework for what is next?



Communicate the Plan

Communication is Key



- Communication eases uncertainty and uneasiness with stakeholders
- Determine who will communicate the transition to stakeholders
- Determine timeline for communicating to stakeholders
- Personalize the communication plan for various stakeholders
- Include current leader in communication plan if possible

Conclusion

- Successful succession planning provides a smooth transition so that the founder's vision is carried on
- Succession Plan Includes:
 - Written Instructions
 - Planning Checklists
 - Key Questions to Consider



Questions?



Download the plan from:

csu.li/succession



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