# **Board Life Cycle:**

**Onboarding and Succession Planning** 

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### Introductions



### **Founder Transitions**

- Why do founders and their transitions matter?
- Why are founder transitions <u>complex</u> and <u>risky</u> for charter schools?
- Describe a transition you have experienced on your board? What are some lessons learned?
- How do board composition needs change over time?
- What should boards consider when it comes time for a major transition?
- How can you create a culture where transition discussions occur proactively?

# **Identifying Gaps**

- How does your board identify skill gaps?
- What are the most difficult gaps to fill?
- What are the current gaps your board is trying to fill and how did you establish those priorities?
- Do these discussions occur at the committee level or as a whole board? Describe your process.

## **Recruiting & Vetting**

- Where do you look for individuals to fill vacancies?
- Who on your board is responsible for these functions?
- O Describe your respective vetting processes?
- What would you like to improve when it comes to recruiting and vetting new members?
- How will you transition these functions to new members?

## Orientation

- What information about your school do you share during the orientation phase (before the prospective member is seated)?
- Have you surveyed new members to determine improvements needed to this process?

# Onboarding

- O Describe the onboarding processes currently used by your boards?
- Who is responsible for onboarding new members?
- O Do you have a process for checking to make sure new board members are reviewing institutional documents?
- How do you build cohesion with new members?
- Why is this process so critical to long-term board functioning?
- O you think there is value in assigning a new board member a mentor? Has your board tried this approach?

#### **Board Growth & Development**

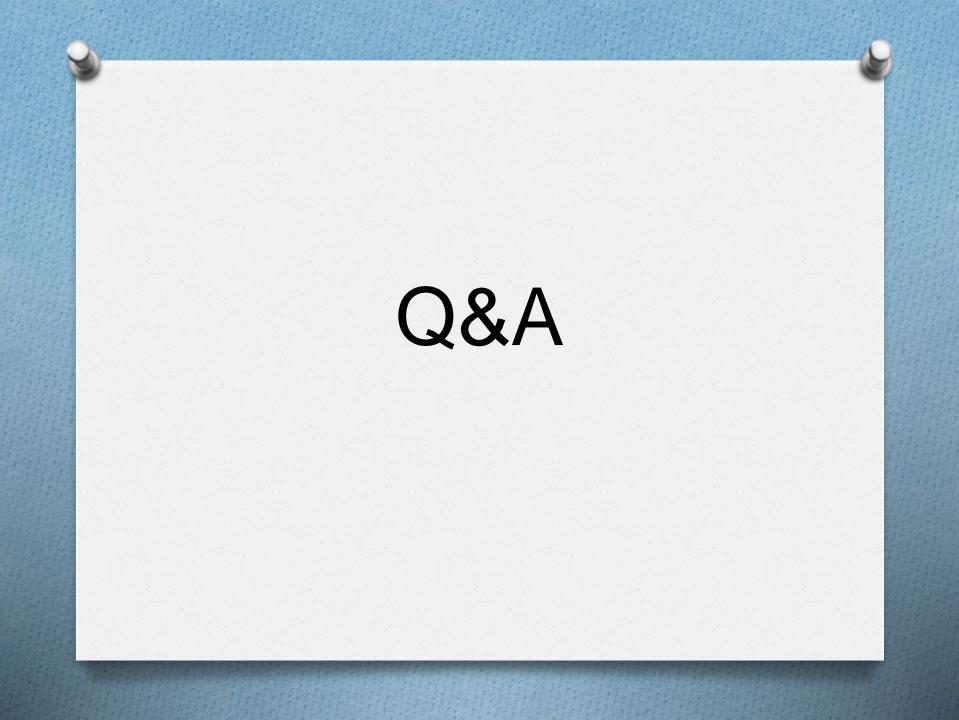
- O Does your board have a written succession plan?
- What should a succession plan include?
- How would you advise a board to start the succession planning process?

#### The Board's Dilemma: Why Organizations Struggle

- Survival fear / responsibility panic
- Time and commitment anxiety
- Authority and power issues
- Staffing fears and issues
- Competing values
- Accountability
- Unattended organizational weaknesses
- Fundraising dependence on founder
- Mission creep and / or static or unfocused direction

#### **Tips for Success**

- Strategic planning
- Board self-assessment
- Understanding the schools current position in all key areas
- Openly discuss transition
- Keep a profile on current board members
- Consider how to manage expectations during the orientation and onboarding phases
- Assign these processes to a committee and monitor progress



#### Resources

 Founder Transitions: Creating Good Endings and New Beginnings. A Guide for Executive Directors and Boards. The Annie E. Casey Foundation.