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Selecting New Board Members

Suggestions for a Strategic Interview Process

Overview

Selecting new board members is one of the most important functions of a board, yet many charter school boards recruit in an ad hoc, disorganized, and less-than-strategic way. Most boards do not have a strong and clear process for identifying potential board members, interviewing board candidates effectively, or deciding which candidates to add to the board. This tool offers guidance for interviewing and selecting new board members. For tips on strategic board recruiting, please see our Steps of an Effective Recruiting Process tool.

Step 1: Create or Review the Road Map

Candidate Interviews and Initial Selection

Once you have identified a potential candidate(s), you will need a clear and thoughtful process established for getting the information you need to decide if that candidate is a good fit for your board. Finding the right board members is both an art and a science. While there will always be a role for “gut feeling,” a strategic and effective interview process is critical to help you maximize the chances that the fit between the board and the candidate is a good one. Through this process, board members get to know each candidate and his/her background, experience, skills, and personality, and the candidate gains a clear understanding of the board’s needs, the role he/she can play, and the board’s expectations of its members. All of this information is important in the ultimate decision about who to add to the board.

The governance committee is responsible for developing a clear candidate interview and selection process. The process should include a timeline, list the steps in the process, assign roles and responsibilities, and ensure that all board members are familiar with the process. We recommend that the governance chair or board chair share the process with each board candidate so he/she is clear about the process from the beginning.

While the specifics of the process will vary from board to board, Education Board Partners (EBP) recommends that the interview process lay out a process and assign roles for the

following steps:

Initial contact: The person designated as the candidate's main point of contact (governance committee chair, board chair, member of the governance committee) should make the initial contact with the candidate via a welcoming and friendly email explaining the steps in the interview process and how long the whole process is expected to take. The contact person should email with the candidate at least once a week, even if just to touch base. We find that many excellent board candidates decide not to join boards simply because the process takes so long and the board falls out of touch with the candidate: the candidate becomes confused, frustrated, or assumes the board has lost interest.

Meeting with the school leader and school tour: It is critical that the school leader and each serious candidate meet. Many boards skip this step, which is a mistake. Every board member should feel a connection to the leader and have the chance to ask him/her questions about the school, its mission, and his/her goals and vision. Likewise, the school leader should have an opportunity to share feedback and insights about each candidate with the governance committee. It is usually convenient to combine this meeting with a tour of the school, which is typically hosted by the school leader.

Interview with the board members: We recommend that each candidate meet with at minimum three board members. The governance committee chair and/or board chair should try to meet with every serious candidate, in part because of their leadership roles and in part so that at least one person meets every candidate and can draw comparisons. Other board members can rotate their participation in the process. The candidate should meet with the committee chair of the committee he/she will likely serve on (if this is already known.)

Observation of a board meeting: We find that observing a board meeting in person gives a candidate a clear picture of board service, and can offer additional insight to the governance committee by seeking feedback and reflections from the candidate following the meeting.

One of the most important pieces of advice we can offer: don't let busy schedules derail the process. Everyone is busy, and it can take weeks—and weeks—to schedule interviews and tours. Instead, push to carry out the interview process in as timely a manner as possible. Often, a process that drags out for months saps the board's enthusiasm for a candidate and drains the candidate's motivation and excitement. Make time to meet candidates promptly, even though it might be somewhat inconvenient at the time. This is critically important work, and busy schedules shouldn't be allowed to stymie it. Maintain communication with the candidate throughout, even just to touch base and explain next steps, asking if he/she has any questions.

Step 2: The First Impression

Initial Contact with the Candidate

The board's initial contact with a prospective board member makes an important first impression. The board chair or governance committee chair should reach out as soon as possible to a board candidate, introduce him/herself, thank the candidate for his/her interest in the board, explain the interview and selection process, and establish a timeframe for the whole process, including:

How many weeks the interview process is expected to take

When the board anticipates deciding whether to elect the candidate

When the new board member's service would begin

During this initial conversation or email exchange, we recommend scheduling the school tour and the interviews; matching up people's calendars can be very challenging and can delay and drag out the whole process.

Step 3: Getting to Know You

School Tour, Board Meeting Observation, Interviews

School tour. A school tour is crucial for candidates to get a "feel" for the school, understand its mission and the strategies the school uses to achieve it, and get to know the school leader. The school tour is a good time for candidates to:

- Review the school's history (including recent successes and hurdles), mission, programs, etc.
- See the facilities and walk the halls
- Observe teaching and visit classrooms
- Get a sense of the student population and school culture

Board meeting observation. Observing a board meeting is a critical part of the decision-making process for board candidates. There should be no surprises for a new member once he/she joins the board, and seeing the board in action is among the best ways for a candidate to assess whether he/she can see becoming part of the group.

Interviews. These interviews don't have to be lengthy, but they offer the best opportunity for

all parties to gain critical insight into whether the fit between the candidate and the board is a good one. Each serious candidate must have an opportunity to meet:

- The school leader
- The board chair
- The governance committee chair and at least two other board members

We recommend devoting time to planning for these interviews and asking thoughtful questions that will give board members the information needed to make informed decisions about new members.

In our Interview Guide for Candidates tool, we recommend sharing information about the school and the board with candidates prior to the interviews, equipping them with enough knowledge and context to answer your questions thoughtfully and ask questions of their own. Finally, every board member should have the candidate's resume and bio and any other available background information before the interviews. There is no reason to use precious interview time reviewing information that can be found on the resume, and having that information beforehand enriches the conversation. Without advance planning, educating the candidate, and informing board members about the candidate, the interviews can easily be a wasted opportunity and fail to generate the kind of information and discussion that will help board members make strategic decisions about each candidate.

Maximizing the value of the interview. Suggestions for what information to give to the candidate up front:

- Board Member Agreement
- Board meeting schedule for the year
- Committee meeting schedules, if possible
- Policy governing financial contributions to the school
- Board Manual
- Board bylaws

Suggested interview questions:

- Why are you interested in serving on a charter school board?
- Have you served on other boards before? If so, what are a few aspects of your board service that were notably either positive or negative for you?
- Why does this particular school board appeal to you?
- What skills, networks, experiences, and other assets will you bring to this board? How will this school benefit from your participation on the board?
- Can you meet the requirements stated in our Board Member Agreement (e.g., time commitment, committee participation, regular board meeting attendance, fulfilling expectations of a board member)? In particular, how much time do you anticipate

being able to devote to board service?

- Do you have any initial preference in terms of committee participation?
- Do you anticipate any constraints on time or service?
- Are you willing to make a financial commitment to the school that is personally meaningful to you? We ask our members to make the school a personal philanthropic priority.
- What questions do you have about this board, our expectations for board members, or anything else regarding becoming a member of this board?

It can be helpful for all board members who interview the candidate to take notes using a rubric like the one at the end of this document. This allows the governance committee to easily collect and consolidate the feedback from all the interviewers, ultimately facilitating an informed discussion and comparison of impressions of the candidate.

Step 4: To Join or Not to Join

Discussion and Decision About Each Candidate

Once a candidate completes all these steps, the governance committee needs to prepare a recommendation for the full board about whether to elect him or her to the board. We recommend the following steps:

Discuss. The governance committee meets as soon as possible after all interviews are complete to review board members' and school leader's comments on the candidate. The committee discusses each candidate in depth, including the school leader in the discussions to the extent possible and desired.

Decide. The governance committee decides whether to recommend to the full board that it elect the candidate or not, and prepares a formal recommendation for the full board. The committee should release their recommendation at least one week prior to a board meeting to allow board members time to review and ask questions.

Vote. The board needs to discuss each candidate recommended by the governance committee and take a formal vote on each one. It is important for the board to vote on each candidate separately—not as a group—and record the votes by candidate.

Strategize. Once the board votes to elect a new member, consider the best representative to invite the candidate to join the board the position. Choose a board member with a personal connection, other friends of the school, or the school leader whomever might best encourage the candidate to accept the offer to join the board.

Notify. Immediately after the vote, let each candidate know the decision as follows.

- Candidates elected to the board:

- o Consider who should contact a candidate to ask him/her to join the board.
- o The designated person contacts the elected candidate to officially ask him/her to join the board, offering congratulations and welcome.
- o Provide key dates at this time: upcoming board meetings, an upcoming retreat, significant school events, etc.
- o Explain the onboarding process.
- Candidates *not* elected to the board:
 - o Consider candidate for other opportunities at school or with the board (for example, could the person join a board committee?).
 - o Consider who should contact the candidate, most likely the governance committee chair. Thank him/her for interest in the board, indicate that there were a number of compelling candidates, and ask if you can stay in touch in the event of future board openings.

Onboard. See the CBP tool on Onboarding New Members to plan an appropriate and strategic onboarding process.