

ISSUE BRIEF

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Assess, Coordinate, Execute: How to **ACE** an Executive Director Search

Written by
Mollie Mitchell,
*Founder and
President*
K12 Search
Group, Inc.

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Expanding Leadership Capacity in Public Education

Commissioned by
Peter C. Groff,
President and CEO
National Alliance
for Public Charter
Schools

As the number of public charter schools continues to grow, so too does the need to find great leaders to run them. Since starting The K12 Search Group—an executive recruitment firm—four years ago, I’ve received more than a few urgent calls from board members asking if we conduct executive director (ED) searches. Even if a board doesn’t have the money to engage a search firm, I’m always happy to answer questions and provide insight gained from my experiences both as a board member conducting an ED search for a charter school and as an executive recruiter who has helped many charter school boards find great talent. I have shared some of this insight here.

There are a number of reasons a board might be searching for a new ED. Perhaps the school is being formed and the board is starting a search for a founding ED, or maybe the founding ED has announced that s/he will leave at the end of the school year. Some boards find themselves in the unfortunate position of having to terminate an ED or learn suddenly that their ED is resigning. In all cases, it’s common for boards to feel a sense of urgency or even desperation to find a new ED, and I’ve seen many boards rush to make a hire. I’ve also seen them neglect to spend the time necessary to ensure they get the best candidate possible.



While a quick hire is tempting, it generally means sacrificing quality. Framing the search into three stages—Assess, Coordinate, and Execute—can bring structure to a process that seems overwhelming. Boards often jump straight to execution, but the key to success is taking the time to assess and coordinate before launching the search. It may take longer, but having the right person on board is worth it. As I often tell board members, the only thing worse than having no ED is having the wrong ED. And as a board, your greatest contribution to the success of your organization will be the hiring of a stellar ED to lead it.

ASSESS

Whether the search for an ED is expected or sudden, taking a step back to assess the strategic direction, organizational objectives, and existing organizational structure is critical. Leadership transitions can be difficult, but they also present a unique opportunity to reflect on the organization. In the assessment phase of a search, there are several things to consider.

First, does the board hold a shared vision for the organization? I'm always surprised by the number of boards that cannot clearly articulate their vision for the school. In order to hire an ED with the right skill set and characteristics, the board must have an agreed-upon vision. Defining a vision is crucial to creating a strategic plan that will articulate the specific goals and benchmarks that are necessary to achieve the vision. Since the ED will be accountable for executing the strategic plan, said plan should be used to determine what skills and experiences the incoming ED needs to be successful. It's possible a board could expect a new ED to lead the strategic planning process, but at the very least, the board should be able to communicate a shared vision prior to hiring a new ED.

Second, what work will the new ED be expected to execute and what work will be managed by others? A common mistake boards make is expecting the ED to be proficient in everything it takes to run an effective school. The table below outlines the responsibilities that are typically part of a charter school ED's job.

Typical Executive Director Responsibilities

Specific Responsibility	Definition
Strategic Planning	In partnership with the board of directors, the executive director will develop and execute a strategic plan to set the stage for both short- and long-term growth.
Team Building	The executive director will be responsible for creating the team necessary to carry out the vision and mission of the organization and to provide ongoing operations and instructional support to the established schools.
Advancement	The executive director will further advance the mission of the organization by identifying and securing new sources of funding from foundations, corporations, and individual donors, and by forming strategic partnerships.
Governance	The executive director will work with the board chair to ensure that the board of directors fulfills its governance functions. The executive director will be responsible for facilitating optimum performance of the board, its committees and individual members.
External Relations	The executive director will serve as the chief spokesperson for the organization, ensuring proper representation of the organization to the local civic, business and political community; the greater education reform sector; and other external constituents, including parents and families.
Financial Management	The executive director will oversee the financial systems of the organization, including the development of the annual budget.
School Support	The executive director will provide support to the instructional team as needed in the areas of staff management and evaluation, hiring, HR issues and other tasks that are necessary to ensure that the mission of the organization is fulfilled.
Instructional Leadership*	The executive director will provide the instructional leadership necessary to produce strong student outcomes. S/he will be able to provide support to teachers through strong coaching and mentoring, professional development and data analysis.

*The “Instructional” Executive Director

Some boards seek to find an executive director who can also serve as the instructional leader of the school. If this is the profile the board chooses, there are a couple things to keep in mind. First, prospective leaders who advance through the traditional educator route (teacher, assistant principal, principal) generally don’t have experience in strategic planning, governance, advancement (fundraising) or financial management. Conversely, the people who do have these skills often don’t have enough instructional experience to be effective at coaching teachers and driving student outcomes. For this reason, many independent charter schools have a principal and an ED. People with both skill sets are rare, and that will make a search for a leader with all these skills more difficult. Second, if the board decides to hire an instructional leader to serve as ED, it would be wise to support that leader with a strong financial manager. The board should also be prepared to play a larger role in areas such as strategic planning and fundraising. Similarly, if the board decides to hire an individual with management experience, senior-level academic support may be needed at the school.



It is a good exercise for any board to analyze this list and see how it stacks up against their vision and strategic plan. Will the new ED need to do all of these things? If so, what are the priorities? If the board had to make trade-offs, what would they be? It's also important to consider what traits and personal characteristics the new ED needs to have. Everyone wants someone who is a team player, a good communicator and a self-starter. Certainly finding someone who is aligned with the mission of the organization is key. But what traits are truly essential to the ED's success?

Third, what is the value proposition of the organization? What is the opportunity for the ED coming on board? How does the organization differ from others that might also be seeking an ED? The market for great talent is tight, even in a recession. The skills needed to run a high-performing charter school are not insignificant. Good people are in high demand, and the board needs to define and articulate what it is about the organization and the role that is compelling and attractive.

Fourth, what is the estimated compensation for the position? Will there be a performance-based component to the package? It might be a good idea to benchmark off other charter schools in the

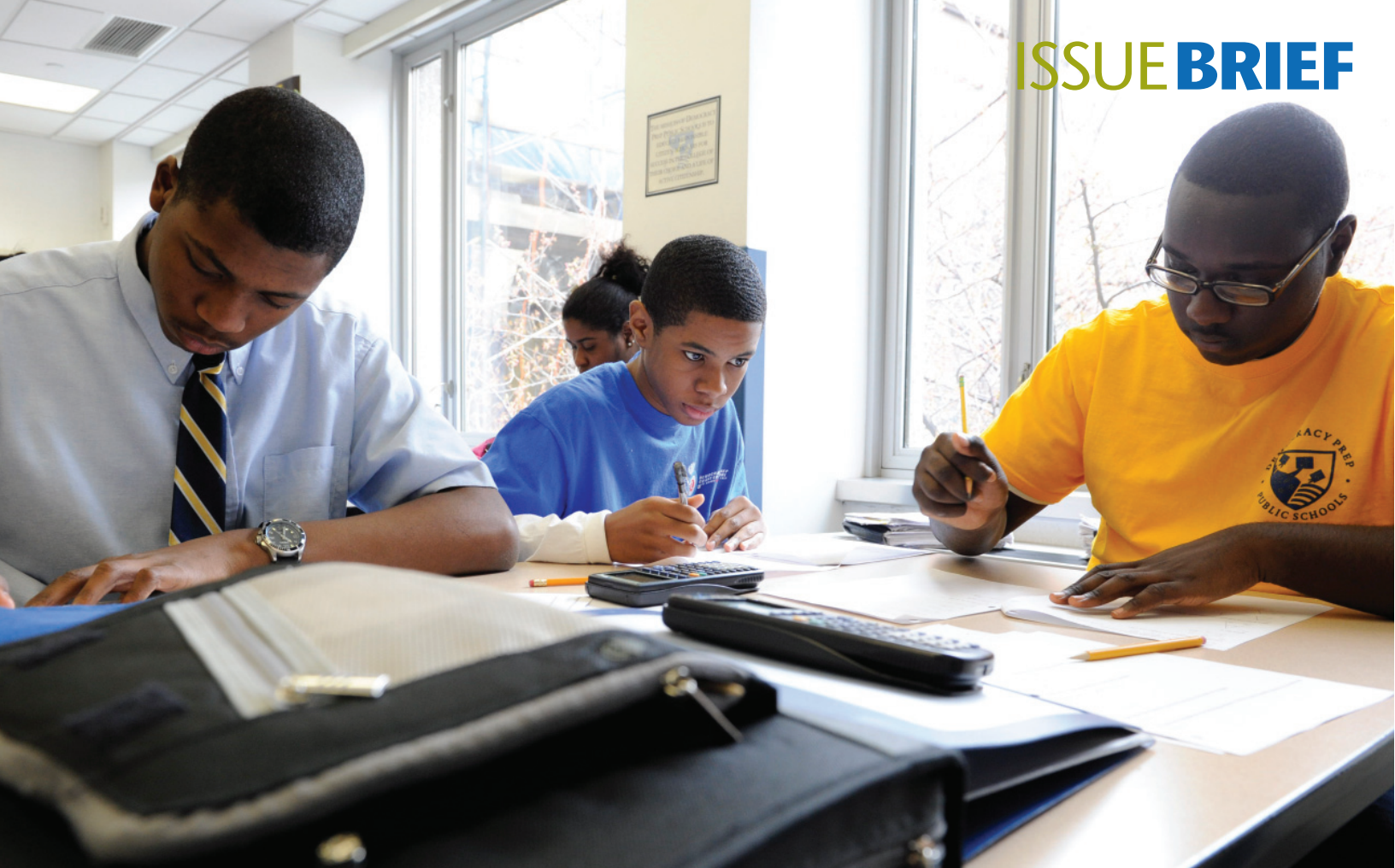
area using the GuideStar website (<http://www2.guidestar.org/>). Depending on the location, an ED of a single charter school could earn anywhere from \$100,000 to \$150,000 annually.

And finally, before the board starts coordinating the search process, it would be wise to think about who will take on the ED role in the interim. Is there someone within the organization who can fill in until a new ED is found? Is there a board member who has the time to be the interim ED? If the outgoing ED has given plenty of notice, this won't be necessary, but if his or her departure is sudden, an interim ED can provide a bridge through the transition.

COORDINATE

This phase of the search involves planning how the search will get done and determining who will be responsible for leading the effort and completing the required tasks. There are generally two options for conducting a search: the board members can conduct the search themselves or they can hire an outside firm to do it. Conducting a thorough search takes a great deal of time. If the board decides to conduct the search on its own,





the following is a checklist of tasks that will need to be divided up among the members:

- ✓ Write job description
- ✓ Post job opening on various websites and email lists
- ✓ Reach out to potential sources and candidates
- ✓ Acknowledge and log incoming resumes
- ✓ Screen resumes
- ✓ Draft interview questions
- ✓ Conduct candidate interviews
- ✓ Negotiate the offer
- ✓ Conduct reference and background checks

The task that takes the most time is reaching out to potential sources and candidates. Finding a great ED through job postings is rare. In order to make people aware of the opportunity and to get recommendations of strong potential candidates, a great deal

of proactive outreach via phone and email is needed. If it becomes clear early on in the process that board members don't have time to commit to this effort, the board may decide to seek the help of an outside firm. If so, the board can expect to pay a fee that is equivalent to 30 percent of the first year's estimated cash compensation. In exchange, the firm will do all the heavy lifting on the search. A good firm can also lead the board through the assessment phase.

There are a multitude of search firms out there, and choosing the right one is critical. Here are the three elements to consider when choosing a search firm: relevance, reputation and relationship.

Relevance: Is the firm's recent work relevant to the board's organization and opening? The more focused the firm, the more likely their database will be full of people who are potential candidates for the search. I would recommend reviewing the firm's list of recently completed assignments on their website to look for similarities in terms



of level of position, function of position, geography and, of course, industry. This should give the board a sense of whether the search is a good fit for the firm.

Reputation: In the search business, reputation is everything. The board is paying for the search no matter what the outcome. So it's important to find a professional firm that is committed to doing whatever it takes to find the right candidate. It is also important to find a firm that will accurately and professionally represent the board's organization in the marketplace. Ask the firm for references. No one would hire a candidate without a complete reference check, and choosing a search firm should be no different. Don't be shy about asking for referrals from other charter schools that have recently made a similar hire.

Relationship: The board will be working closely with the firm, so they need to like the person with whom they will be working. I often tell people who are evaluating different firms that, for the most part, all the firms that conduct charter school ED

searches are reputable and do good work. What it boils down to is how comfortable the board feels with the individual recruiter. Look for good professional chemistry and compatible communication styles. Sometimes searches hit a rough patch. Obviously, an amiable relationship will make those occasions much easier to bear.

EXECUTE

Once the board has assessed and coordinated, the real work of finding the next ED can begin. If the board decides to go it alone, it's important to determine up front who will be responsible for the tasks and how people will be held accountable. It's a good idea to have one board member take the lead so a single person can efficiently manage the activities of the search and conduct regular check in calls to discuss progress. It's also a good idea to set a proposed timeline. A search takes a minimum of four months from start to finish.

How to Execute

The table below describes in more detail each search task and best practices regarding execution:

Search Task	Execution
Write job description.	A job description should be a compelling marketing piece. Include information on the school's results to sell the opportunity to potential candidates. Also, in order to get a well-rounded picture of the role and qualifications, it's a good idea to interview all the stakeholders to get their input. This would include board members, the school principal, a few teachers and maybe even a parent leader.
Post openings on various websites and email lists.	Finding great leaders through job postings isn't common, but job postings are a good way to get the word out. Be strategic. If you post on Craig's List, you're going to be inundated with low-quality resumes. Here are a few suggestions: Bridgestar, Teach for America alumni, The Public Charter Schools Job Board and the state charter school association website.
Reach out to potential sources and candidates.	Make a list of the organization's board members, funders, community champions and other supporters. Reach out to them for ideas.
Acknowledge and log incoming resumes.	Keep track of everyone who has applied on a spreadsheet. Be sure to acknowledge receipt of each applicant's resumes as it engenders goodwill toward the organization.
Screen resumes.	Consider making one person responsible for reviewing each resume that comes in and following up with those who meet the requirements on paper. In the initial conversation, some basic questions to ask include: Why are you leaving your current position? Why is this opportunity interesting to you? What is your salary expectation? When could you start?
Draft interview questions.	Using the job description, develop a list of questions that will test knowledge and experience in each of the key areas.
Conduct candidate interviews.	It is unlikely a candidate would be selected after only one interview. The "interview" should be a process that starts with the board search committee. Once the field has been narrowed to one or two finalists, it would be appropriate to have them meet with a team of administrators and teachers.
Negotiate the offer.	Avoid a drawn out negotiation by putting out your best offer first. A lot of back and forth can kill the excitement on both sides
Conduct reference and background checks.	Ask for a list of references from the finalist candidate. Check at least three but probably no more than six. Be sure to have them include at least two former supervisors and a direct report. Make the offer contingent on the reference checks



If the board decides to work with a firm, the firm will do most of the work in the execution phase. Typically, a subset of the board is named as the selection committee, and they will be the most engaged in the search process. Generally, members of the search committee should expect to participate in weekly or biweekly update calls with the search firm and to review and comment on resumes during the calls. Additionally, they should make themselves available to talk to prospective candidates who are seeking more detailed information about the organization. They should also serve as active recruiters for the organization. Recruiting is a process that goes both ways. While the board is

evaluating the candidates, the candidates are also evaluating the organization. How board members engage with prospective candidates can go a long way in attracting them to the opportunity. Ultimately, however, the most important role of the search committee is to interview the final panel of candidates and make a recommendation to the larger board.

Whether a board conducts a search on its own or with the help of an outside firm, the time invested by the board is necessary to ensure the best possible outcome. If there is one thing a board should get right, it's hiring a stellar ED to lead the school. And with the right preparation, a board can ACE the job.

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1101 15th Street, NW, Suite 1010, Washington, DC 20005
T. 202.289.2700

The National Alliance for Public Charter Schools (NAPCS) is the national nonprofit organization committed to advancing the charter school movement. Our mission is to lead public education to unprecedented levels of academic achievement for all students by fostering a strong charter sector. The Alliance provides assistance to state charter school associations and resource centers, develops and advocates for improved public policies, and serves as the united voice for this large and diverse movement. NAPCS represents more than 1.8 million students enrolled in more than 5,000 charter schools across 40 states and the District of Columbia.

