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**General Governance Training  
Case Study Review #3  
GCSA Conference – Tuesday, March 6, 2018**

**Challenges of Choosing a New Board Chair**

- Rocky Mountain Charter School (RMCS) was a small charter school with a mission to better serve English language learners. Although the school was only four years old, it had already begun to make great gains in serving ELL students.
- The principal, Juanita, was an able manager and strong leader who got a lot of work done quickly. She and her staff worked tirelessly to achieve results. The majority of the full-time staff had first served as volunteers, during the petitioning phase, before becoming employees. The atmosphere in the school was cordial and committed. The board of RMCS consisted of eight members, and had been involved since the school's founding. Umberto, who had been board chair from the beginning, was seen as a dynamic leader, and worked well with Juanita. He had primarily been responsible for getting three donors from the community to make major financial contributions.
- During the past four years, board members had demonstrated their commitment by giving freely of their time and money. In fact, RMCS had a policy stating that all board members must contribute money to support infrastructure, programs, and long-term goals, to the best of their ability. While board members were still actively engaged in board duties, some were beginning to talk about cutting back a little, and maybe rotating off the board. Ming and Lee, two members of the governance committee, had stepped forward to lead the recruitment process. At the upcoming annual board retreat, they would be submitting the names of two qualified candidates for board membership.
- Despite this success, they faced a serious challenge. With a term limit of four years for the board chair, they needed to find a replacement for Umberto because his term would end in two months. Although Ming and Lee had repeatedly asked for nominations, no one had come forward. In informal conversations, members talked about how hectic their lives were and how they looked forward to having more time for professional and personal activities. At the same time, they all said that they really enjoyed their board service and were proud to be affiliated with RMCS.
- Wrestling with board dilemmas, time was running out. Everyone knew the board needed a new chair, and they all felt some pressure to throw their names into the hat. Finally, Sheila stepped forward, saying she would like to be nominated for the board chair position. Everyone liked Sheila; she was a very nice woman, someone who would always help out in a pinch. But Ming and Lee were pretty sure that other board members felt as they did, that Sheila was not a natural leader who could rally the troops and revitalize the board's energy. Furthermore, strategic planning was scheduled to begin just after the new board chair would take office. Without a doubt, this process would certainly be easier with a board chair with proven organizational, management, and leadership skills.



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- Could the board and organization afford to take a chance on someone who might not be viewed as an equal partner by Juanita, or who might not be proactive and results oriented? On the other hand, they were in a bind. If other board members shared their perception of Sheila, but still weren't interested in serving as board chair, what options did Ming and Lee have? Should the governance committee present Sheila as a candidate?

Analysis Questions –

1. What is the most important issue in this case study?
2. In addition to the primary issue, what other issues may need to be addressed?
3. What are the steps that you would take to resolve these issues?
4. What behavior(s) will your board change after reviewing this case study?