Governing in an Unprecedented and Unexpected Crisis: How Charter School Boards Can Navigate the Coronavirus Situation

**NOTE:** Please check our blog for the latest information and updates.

Boards matter. What boards do even in the smoothest of times has a direct impact on the quality and sustainability of their school. These are far from smooth times. Every school in this country is now facing a genuine crisis and enormous uncertainty. We are here to guide and support board members of public charter schools as they step up and partner with their school leader, authorizer, and local decision-makers to help the school, staff, families, and children navigate through the crisis.

In times of crisis and uncertainty, the line between governance and management can get blurry. It’s important for boards to notice and name this, while acknowledging that it will be necessary.

We hope this governance advice is helpful; please tell us what additional information you need and we will do our best to provide it.

This memo is organized into three sections:
- Offer Steady Leadership and Support the School Leader
- Communicate Communicate Communicate
- Continue to Govern Well

**OFFER STEADY LEADERSHIP AND SUPPORT THE SCHOOL LEADER**
- Don’t be invisible.
  - Offer steady leadership and presence.
  - It’s important for families, staff, the authorizer, and the school leader to know that the board is engaged, involved, aware, and active.
  - Be as visible as you can be over email and on calls/video conferences with staff and families.
  - Check in with the school leader regularly (see below for thoughts on this).
● Reassure to the extent possible.
  ○ Reassure to the extent possible, but openly acknowledge uncertainty. Being transparent and honest will serve everyone.
  ○ Do not give false assurances or make promises that are not within your power to keep.
  ○ Help the school leader and community be as comfortable as possible with the uncertainty.
  ○ Express the extent to which the board is collaborating with the authorizer and other leaders, and to which they are collaborating with one another to provide steady leadership.

● Be an active, not passive, source of support for the school leader.
  ○ Their job is very hard on the best of days. It is excruciating right now.
  ○ Take into account that the school leader is facing not only the challenges of moving school to distance learning, but also worrying about/caring for/supporting the teachers and staff; addressing issues of safety, food security, and mental health of students; and taking care of their own families—children, aging parents, etc.
  ○ Board point person should check in daily with at least a quick “Hi, how are you? What do YOU need?”
  ○ Schedule formal check-ins every week, and honor that time on your calendar.
  ○ If it is ok with the leader, also check in frequently with school leadership staff. “How are you holding up? Thank you so much for your leadership. We see what you are doing and we appreciate it so much.”

● Decide together with the school leader how to stay engaged.
  ○ Don’t assume that daily check-ins are helpful or necessary, but staying informed and involved is essential.
    ■ Consider asking the school leader to copy the board chair on emails to keep you in the loop, rather than having to write separate emails which take more time
  ○ Always be conscious of how much burden the board is adding to the school leader’s plate. Do not issue lists of questions, demands, deadlines. Ask yourself what can wait, be careful with your tone and approach, and be constantly mindful of all the demands on the leader.

● Stay on top of all key issues, but don’t act if not appropriate.
  ○ Work with the leader to make and keep updated a list of all the pressing concerns:
    ■ Physical and emotional safety of students, teachers & staff
    ■ Keeping teaching and learning going (this differs significantly depending on grade levels)
- Financial management
- Testing/accountability
- Special ed compliance
- Burden on families
- Staff
  - What are the expectations of teachers?
    - Make sure this is clear
    - Make sure this is equitable
    - Are there creative ways to give teachers flexibility but ensure that duties are being covered?
  - Board needs to be involved in issues around what supports are available for staff (hourly workers, benefits, emotional support, resources for distance learning)
  - Extra mental health support for staff?
- Vulnerable populations (low income, families experiencing racism, families with domestic violence situation)
  - You don’t have to weigh in on or make decisions about these issues, which fall under management. Stay informed and monitor how they are being handled, remind the leader to reach out to experts, seek advice, and tap into the many resources available to schools.
  - Offer strategic input if relevant, and don’t if it’s not.
  - Ensure that one or more board members checks relevant websites daily to stay on top of information:
    - Authorizer (most are publishing helpful resources and changing information)
    - District
    - State Department of Education

- Take whatever you can off the school leader’s plate.
  - ALWAYS ask first: “How can we help? What can we do to help?” DO NOT take initiative in ways that could turn out to be unhelpful, even with the best intentions. This makes everything harder.
  - Be willing to do almost anything.
  - Don’t commit and then not follow through. You all have your own full plates with your families, jobs, and health. Do not over commit; only say you will do something if you are sure you can.
  - Examples of things board members can do:
    - Offer to reach out to external stakeholders to get answers and information.
    - Coordinate with community organizations serving your families.
    - Field some community concerns.
    - Handle some logistics related to arranging for delivery of instructional materials, etc.
Hop on calls Authorizers and other local/State entities are doing, then share back to the board and school leader.

- Show support for and confidence in the school leader.
  - Find ways to express this support to the leader directly and to the school community.
  - Be on the same page.
  - The board and the school leader must be in lockstep right now about messages, information, plans, and decisions.
  - Do not go off message or offer your own opinion or direction to parents, staff, etc. That will make a bad situation worse.
  - Do not deviate publicly from shared messaging. If you have concerns, share them immediately and address quickly with the leader. Do not create confusion or the appearance of fraying leadership to the school community.

- Ensure continuous school leadership.
  - Know who the interim leader will be if the school leader gets sick. Make sure that board and school staff knows who the interim leader would be if there was a need.
  - Ensure the interim leader is ready to handle the duties.
  - If needed, help the school leader prioritize and delegate.

- Focus on both the head and the heart.
  - This is an incredibly difficult time, obviously. Remember to be empathetic. The school leader has an impossible job right now that no one is prepared for. Put aside any previous concerns about performance, if possible, and focus on right now.
  - Listen, don’t always talk. Listen.
  - Focus on empathy and try to offer as much relief as possible.
  - Encourage the leader to exercise, take breaks, and take care of themselves. They need to hear this from you often.

- Prepare messaging now in the event that a staff member or parent tests positive:
  - Alert school community immediately—do not hide this
  - Check current CDC and local health department guidelines and follow those

COMMUNICATE, COMMUNICATE, COMMUNICATE

- Centralize and coordinate communication.
○ Come up with your communications and response team now: which board members will handle intra board, school community, and external communications?
○ Make lines of communication clear and known and work hard to avoid mixed messages, dropped balls, and confusion

- Communicate with parents/guardians regularly and frequently.
  ○ Have the board chair co-sign weekly updates to the school community.
  ○ Explain that the board is actively involved.
  ○ Share that you are collaborating with the local school system and local and national authorities.
  ○ Say you don’t know when you don’t know, but seek answers when you can.
  ○ Collaborate with PTA heads.
  ○ Decide how up-to-the-minute information will be shared with families and make sure you know who is maintaining this:
    ■ Emails
    ■ Website
    ■ Texts
    ■ Robocalls

- Communicate with school staff regularly and frequently.
  ○ Personal phone calls go a long way. The board can split the list of senior leadership staff and make weekly calls.
  ○ Decide how up-to-the-minute information will be shared with staff and make sure you know who is maintaining this:
    ■ Website
    ■ Emails
    ■ Texts
    ■ App

CONTINUE TO GOVERN WELL
- Keep the full board informed at all times.
  ○ This is crucial, as the legal authority of the board is vested in the full board, not just the board chair.
  ○ Decide now what communication channel you will use for the board (email, group text, WhatsApp or another mobile app, etc.), and make sure every single board member is actively checking. Do not assume this! “Can everyone please reply all to this message by 4 pm today so I know I have your contact information right?”
Don’t assume that normal board communications channels (most likely email) are the best—ask all board members how often they are able to check email and whether another form will be better. Most importantly, make sure everyone is using the same way to communicate with one another.

- Make sure your bylaws reflect operating during these trying times.
  - Assign this to your Governance Committee chair immediately.
  - Consult with counsel ASAP, and decide if any changes need to be made.
  - Do you need/want to amend the bylaws to empower the board chair or a small group of board members to make decisions in an emergency situation for the board? Or pass emergency resolution giving clear authority to the board chair?
  - Do your bylaws allow for virtual meetings? Decisions by email?

- Do not forget the future.
  - Consider formally assigning some committees/board members to handling the immediate crisis-related issues, and others to focus on longer-term strategy and ongoing board business, if that makes sense. Don’t all try to do everything.

- Write down as much as you can.
  - This is the time to document as much as you can, not just meeting minutes. Consider asking the board secretary to serve this function. File and save emails, keep running list of decisions and information and changing circumstances, keep a master to-do list accessible to all board members and school leader.
  - Track follow-through on a master list (we use Google Drive).
  - Detailed note keeping can help in learning for future crises, and also will allow you to look back and remember the important, and even heroic, actions of school leadership, teachers, etc., so you can celebrate and recognize them later when the crisis passes.

- Continue to meet as a board!
  - Address legal governance concerns.
    - Consult counsel with regard to Open Meeting laws, etc.
    - Reach out to the authorizer immediately regarding waivers from or changes in Open Meeting laws.
    - Check with your state charter association or state website to see if there have been Executive Orders or temporary emergency measures to Open Meeting laws.
  - Set up the technology for board meetings.
Ask one board member (or a staff member from the school administration) to set the board up for remote meetings (Zoom, GoTo Meeting, and Google hangout are some options).

- Decide now how often you will meet and when.
- Take minutes and attendance, circulate an agenda in advance, etc.
- Keep meetings well-run and organized.
- Keep lists of questions that need answers and assign board members, collaborating closely with the school leader/leadership staff, to track down the answers:
  - Testing/accountability
  - Enrollment for next year
  - Availability of Federal funding
  - Easing of requirements

- To the extent possible, continue to do the work of the board that needs to be done.
  - If you need to review next year’s budget allocations, do that.
  - If you are in the middle of a facilities purchase, ensure that the point person from the board is reaching out and sharing back information with the full board.
  - If you are in the middle of a renewal, contact the authorizer and understand what steps need to happen.

- Identify and address policy/liability issues quickly if possible
  - Reach out to advocacy organizations to share what you need
    - Does the legislature need to change the Open Meeting law?
  - Be attentive to HR issues
    - Look at the school’s employee handbook to ascertain if new policies are needed, for example, PTO, remote work, sick leave, family leave, etc.
    - Work with the school leader to clearly define who are the “essential” staff, who decides, are guidelines clear, do all staff know who is essential (minimize uncertainty).
  - Be attentive to special ed compliance
    - Consult counsel.
    - Stay on top of this issue in check-ins with school leader.

- Keep on top of financial oversight.
  - Monitor financial health.
    - Board treasurer needs to continue to work closely with CFO and authorizer to monitor cash flow and monthly financials.
  - Stay on top of how emergency response measures impact the budget.
○ Discuss impact on vendors, service providers, contractors; can the school continue to pay these individuals and small businesses despite interruptions in service?
○ How will the school handle fees parents have paid for afterschool programs, special activities, trips, etc?
○ Review financial policies
  ■ Do you have a reserve policy?

● Seek and build partnerships if possible and helpful.
  ○ Work closely with your authorizer starting immediately.
  ○ Understand which community organizations are providing resources, food, child care, internet, etc and reach out to establish communication channels, then share info with school leader and school families, etc.

RESOURCE LIST FOR CHARTER SCHOOL BOARDS

(We will update this as we get more information)

More info in DC: https://coronavirus.dc.gov

More info in Louisiana: https://www.louisianabelieves.com/resources/covid-19


More info in MO: Missouri Charter Schools COVID-19 Response – News and Events
More info in DE: COVID-19 / Homepage

More info in California: https://www.cde.ca.gov/ls/he/hn/coronavirus.asp