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## **302 Executive Director Role & Succession Policy**

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### **I. Purpose**

This document establishes both the qualifications and expectations for the Executive Director position and the procedures for succession to ensure stable and effective leadership at Three Rivers Montessori (TRM). It aligns with Minnesota Statute §124E.06 and §124E.12 and the TRM Board's commitment to maintaining continuous, mission-aligned leadership.

### **II. Executive Director Role Overview**

The Executive Director (ED) serves as the chief executive officer of the school, responsible for academic leadership, operational management, financial oversight, and compliance. The ED works in partnership with the Board of Directors and engages families and community partners to advance TRM's mission.

While Minnesota law does not require a charter school director to hold an administrative license, TRM requires that all Executive Directors—licensed or unlicensed—demonstrate the competencies and experience necessary to meet the standards of effective school leadership.

### **III. Qualifications**

#### **Essential Qualifications**

- Bachelor's degree required; Master's preferred (education, leadership, or related field).
- Minimum of 5–10 years in K–12 education, including leadership or program management.
- Demonstrated experience in staff supervision and instructional leadership.
- Experience managing school operations, budgets, and compliance.
- Knowledge of Minnesota charter school statutes and authorizer expectations.
- Strong interpersonal, organizational, and communication skills.
- Demonstrated ability to lead a diverse team and maintain a safe, inclusive environment.

## **Desired Qualifications**

- Montessori background (AMI or AMS certification preferred).
- Degree in education or a related field.
- Three or more years of experience teaching in a Montessori environment.
- Administrative or leadership experience in a charter school.
- Demonstrated success in financial management and community engagement.

## **Knowledge, Skills & Abilities**

- Strong knowledge of K–12 curriculum, assessment, and instruction; familiarity with Montessori methods a plus.
- Knowledge of Minnesota charter school statutes, federal/state education regulations, and authorizer compliance requirements.
- Strong organizational, strategic planning, and data-driven decision-making skills.
- Excellent communication, interpersonal, and conflict-resolution skills.
- Ability to build positive school culture and engage families and community stakeholders.
- Demonstrated ability to lead a diverse team and maintain a safe, inclusive, and supportive learning environment.

## **IV. Key Responsibilities**

### **Academic Leadership**

- Oversee curriculum implementation and instructional quality.
- Support teacher professional growth and data-driven instructional decisions.
- Ensure compliance with state and federal academic standards.

### **Operational Oversight**

- Manage daily operations, including safety, facilities, and student services.
- Supervise all staff and ensure efficient school systems.

### **Financial Management**

- Develop and manage annual budgets and financial reports.
- Ensure compliance with financial audits and authorizer requirements.

### **Governance & Board Relations**

- Serve as the Board's primary liaison.
- Provide timely reports on academic, financial, and operational performance.
- Support policy development and strategic planning.

### **Community & Family Engagement**

- Build strong relationships with families and the wider community.
- Promote a culture of inclusivity, collaboration, and transparency.

## **V. Expectations**

- Model professional, ethical, and transparent leadership.
- Align decisions with the school's mission and long-term goals.
- Maintain compliance with Minnesota statutes and authorizer standards.
- Foster a positive workplace culture that reflects TRM's values: *Love, Grow, Serve*.
- Engage in ongoing professional development.

## **VI. Qualifications of a non-licensed candidate:**

Even without a Minnesota administrative license, a strong candidate should demonstrate:

### **1. Educational Experience**

- Minimum 5–10 years in education (teaching, curriculum leadership, or educational program management).
- Understanding of K–12 curriculum, assessment, and instruction, ideally including Montessori or other specialized methods if applicable.
- Experience with differentiated instruction and Multi-Tiered Systems of Support (MTSS).

### **2. Leadership & Management**

- Experience supervising staff, including teachers and support personnel.
- Demonstrated ability to lead professional development and implement instructional initiatives.
- Strategic planning experience, including setting and achieving academic and operational goals.

### **3. Financial and Operational Acumen**

- Experience managing budgets, grants, or school finances.
- Knowledge of school operations, human resources, and compliance requirements.
- Ability to work with a board of directors and external stakeholders.

### **4. Regulatory & Compliance Knowledge**

- Understanding of Minnesota charter school statutes, federal and state education laws (special education, civil rights, reporting requirements).
- Familiarity with charter authorizer expectations, audits, and public reporting.

### **5. Communication & Community Engagement**

- Strong skills in communicating with families, staff, and the community.
- Ability to build partnerships with local organizations and stakeholders.

## **6. Vision & Strategic Thinking**

- Ability to articulate and execute a clear educational vision aligned with the school's mission.
- Data-driven decision-making skills to improve student outcomes.

## **VII. Expectations for the Role**

An ED without an administrative license should still be able to demonstrate leadership competence in these areas:

### **1. Academic Leadership**

- Oversee curriculum implementation, assessment, and student achievement.
- Ensure compliance with Minnesota Academic Standards and federal/state regulations.
- Support teacher development through observations, feedback, and coaching.

### **2. Operational Oversight**

- Supervise staff and ensure efficient daily operations.
- Manage facility, safety, and operational logistics.
- Maintain student enrollment, attendance, and discipline policies.

### **3. Financial Stewardship**

- Prepare and manage the school budget.
- Ensure compliance with financial reporting and audits.
- Oversee funding sources, including state funding, federal grants, and fundraising.

### **4. Governance & Board Relations**

- Serve as the primary liaison to the charter school board.
- Provide regular reports on school performance, finances, and compliance.
- Support the board in policy development and strategic planning.

### **5. Community & Family Engagement**

- Build a positive school culture.
- Engage families in student learning and school initiatives.
- Represent the school in the broader community.

## **VIII. Additional Considerations**

- Some boards require ongoing professional development in school leadership and may encourage completion of administrative licensure over time.
- Competency-based evaluation tools can be used to ensure the ED meets Minnesota standards for leadership, even without an administrative license.

## IX. Succession Policy

### Purpose

To ensure a seamless transition and continuity of leadership during planned or unplanned absences or departures of the Executive Director.

### Definitions

- Succession Plan: Board-adopted process activated upon notice of departure or incapacitation.
- Acting Director: Temporary appointee serving until a new director assumes duties.

### Procedures

1. **Notification & Review** – Upon notice of departure or incapacity, the Board convenes to review and update the succession plan.
2. **Appointment of Acting Director** – The Board appoints an Acting Director, potentially from current staff or external candidates.
3. **Job Description & Qualifications Review** – The Board reviews and updates the ED job description and qualifications.
4. **Search Process** – The Board or its contracted search firm may conduct a candidate search and selection process in collaboration with the authorizer.
5. **Posting & Recruitment** – The position may be posted for a minimum of 30 days through Montessori networks, MACS, and relevant educational platforms.
6. **Selection Steps** – Review applications, conduct interviews, check references, and appoint the new Executive Director.
7. **Transition & Entry Plan** – Develop an onboarding plan for the incoming Executive Director to ensure smooth transition.