

Capacity Interview Toolkit

Tool #4: Performance Tasks

*A* ***Performance Task*** *tests the collective skills of the applicant group using scenarios that present realistic and common challenges associated with operating a charter school. Review teams should use a performance task suited to the applicants’ noted strengths and deficiencies.*

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| *All performance task materials will be retained by [AUTHORIZER]. Applicants are asked NOT to discuss the tasks or materials with anyone other than their team in order to preserve the integrity of the interview process.*  |

Thank you for your submission to the [AUTHORIZER] request for charter proposals. In addition to a comprehensive review of your proposal, we are interested in obtaining information about your proposed board’s capacity for financial management. Please complete the performance task below, which will be evaluated and discussed during your interview.

## Financial Exercise

Assume the role of finance officer for a currently operational charter school. It’s May and budgeting season for the upcoming year is underway. Given the possibility of state budget cuts next year, it’s reasonable to expect a cut in your school’s per-pupil revenue. As such, your school leader is looking to make a five percent cut to non-personnel expenses in the next year’s budget.

You have the enclosed report\*, which is provided to you on a monthly basis. Please briefly answer the questions below and provide concrete recommendations to your school leader in order to effectively allocate funds to support student achievement in the upcoming school year. Note any assumptions that you make in completing the exercise.

**Questions:**

1. What additional info would be helpful in order to deliver quality analysis to your school leader? The finance team is willing to compile just about anything upon request.
2. Identify five budget lines that you think your school leader has significant control over.
3. Which three budget lines would you recommend revising downward in next year’s budget in order to help achieve the 5% cut to non-personnel expenses? Explain your choices.

*[AUTHORIZER] Info:*

* “Encumbrance” = Money that has not been spent yet, but is reserved to be spent in the fiscal year
* The fiscal year cycle is July 1 through June 30
* “Adjusted Budget” is the most recent and accurate budget (compared to “Original Budget”)

*\* Don’t forget to provide a monthly statement with dummy financial data for use on the following page.*