

Sounding Board

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Promoting Quality Charter School Governance

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Charter School Board Self-Evaluation

Introduction

Great charter schools need great school boards. The board must function at a high level of effectiveness in order to ensure sustainable, great outcomes for students while meeting ethical, moral, and legal obligations. Osprey Wilds evaluates aspects of the school's governance when it observes board meetings, reviews board meeting minutes, and conducts renewal evaluations (because ultimately, the school board is accountable for the performance of the school). However, charter school boards can (and should) participate in ongoing, meaningful self-evaluation to affirm effective governance and improve performance.

There is no question that boards are at their best when they are reflective and growth-minded. Modeling continuous learning at the top of the organization helps to set a tone of committed, self-initiated learning for all adults in the school community.

What do Minnesota Statutes Say about Charter School Board Self-Evaluation?

While MN §124E specifies that charter school boards must evaluate the school's leader, there is no reference in that or any other MN statutes that require charter school boards to evaluate their own performance.

Purpose(s) of Charter School Board Self-Evaluation:

The most effective charter school boards evaluate their own board governance on an ongoing basis in order to ensure the board is operating at its highest level of effectiveness in service to the school and the students and families it serves.

Charter school boards that regularly conduct board self-evaluations also model the process of continuous improvement for others in the organization, which provides the board with a platform to set similar expectations of self-evaluation or self-reflection for school leaders and for all other school staff.



The [Center for Charter Schools](#) at Central Michigan University (an organization that authorizes over 50 schools in Michigan) encourages board self-evaluation and states, "One of the most powerful practices for boards is to conduct a self-evaluation of the quality of their own decisions and overall operations of the charter school." The Center further states, "Experienced and highly effective board members have learned that it is critical to regularly conduct short, practical evaluations on the quality of their activities and attend to the results of those evaluations throughout the year."

Setting the Stage or Getting Ready for a Charter School Board Self-Evaluation:

Getting started sounds easy but may not be if everyone on the board does not see the value in self-evaluation. The first step for a board is to come to consensus about the importance of continuous improvement of its governance processes and procedures and to make a commitment to participate in activities toward those ends, including ongoing board self-evaluation.

Once the board has come to consensus and has made a commitment, the next step is for the board to identify the behaviors of the board collectively, and of individual board members, during the periods of time when the board is operating at its very best. In other words, what do the board and its members "look like" when high quality governance is taking place? There may be some subjectivity in doing this and everyone may not fully agree; however, it is likely the board can come up with a list of ideas that describe the board at its most effective.

As the board is coming to agreement on the elements of effective board governance, the board can identify specific examples from past deliberations, decisions, challenges, and opportunities that illustrate the board's effectiveness and areas for improvement (or ongoing monitoring).

During these discussions, a board getting ready to conduct a self-evaluation may consider the following norms:

- Every board member should think, consider, evaluate, and come to conclusions as individuals.
- Board members benefit from hearing other board members' perspectives and prior experiences.
- When the board makes a decision, all board members, regardless of their original individual conclusion, should support the group's decision without qualification.
- Board members must make every effort to be candid in their communication.
- As difficult as it can be at times, board members must focus on being objective in their judgments.



Creating a Charter School Board Evaluation Timeline

As stated above, charter school board self-evaluations should be ongoing year-round activities; however, they can have annual starting and ending points, usually for a school year (e.g., July through June). After a thorough review of the school's mission and vision, the board can define criteria and identify a timeline and process by which it conducts the self-evaluation.

Here are some examples currently used by charter school boards:

1. Monthly end-of-meeting review of the board's effectiveness during that particular meeting. End of meeting reviews can be structured to consider the activities the board sees when it is at its most effective in governance. Monthly reviews can also be summarized at mid-year and again at the end of the year to determine progress and areas of continuing need for board training.
2. Mid-year review of the board's effectiveness during the period of time from July through January.
3. End of year review of the board's effectiveness during the period of time from July through June.
4. Quarterly or other forms of charter school board self-evaluation. There are many models available from professional development organizations and external trainers, or your board can create one of its own that meets the goals of conducting a board self-evaluation.

Criteria for a Charter School Board Self-Evaluation

In the absence of clear criteria against which the board is evaluating itself, the process of a self-evaluation can quickly become meaningless and subjective. Basing evaluations on popularity, self-satisfaction, or procedure (rather than effectiveness) does not actually help the board guide and improve the performance of the school. Instead, the board should consider what's important, ensure it is evaluating its governance capacity, not management (the important difference between *ensuring* and *executing*), and focus on strategic dialogue and decision-making.

The elements of a school board self-evaluation can vary, and those provided below are not intended to be all inclusive. Take them as a starting point as your board considers the elements of a board self-evaluation that will assist the board at being the very best it can be.

How well does the board, both as individual members and as a unit:

1. Engage in meaningful discussions with others about the school's contractual goals and expectations, especially those goals related to students' academic performance, student's environmental literacy, and any performance improvement plans?
2. Thoroughly understand and engage in the stewardship of the school's finances?
3. Understand and is committed to the school's mission and vision?
4. Know and is committed to the work the board needs to accomplish?
5. Thoroughly prepare for every board meeting (e.g. reads, evaluates, identifies questions and/or additional information needed for all board meeting agenda items prior to decision making, etc.)?
6. Attend all board functions at high rates, including regular, special and emergency board meetings, as well as other pertinent school related events at the school or in the community?
7. Take an active role in the development of the school leader's job description and professional performance evaluation?
8. Maintain an appropriate relationship with all school leaders and other staff members?
9. Accept board leadership responsibilities when called on by other board members to do so (e.g. serving as a school board officer)?
10. Clearly understand that the board's role is governance and that the school leader's role is the implementation of board approved policies and to otherwise conduct the day-to-day administration of the school? How well does the board carefully and consistently act to maintain the separation of those roles?

The board may also consider embedding professional development in its self-evaluation processes. For example, there are a variety of texts available designed to support high quality and effective charter school board governance (e.g. *Charter School Board University* by Brian L. Carpenter, *Peak Performing Governance Teams* by Tim Quinn, *Governing for Greatness* by Brian L. Carpenter, *How Not to Be a Terrible School Board Member* by Richard E. Mayer). The board may consider reading a chapter or section of these texts before the meeting, and then analyze the board meeting through the lens of what they learned. Many of the charter school board books also include reflection questions at the end of each chapter that can be used to support ongoing self-evaluation.

Important Considerations for a Charter School Board Self-Evaluation

- **Time.** Successful charter school board self-evaluations require that board members fully engage in the process, which means devotion of time to the process. Often when performing end of meeting board self-evaluation processes, boards conduct the activity in a hurried and less thoughtful way, perhaps because the activity occurs at the end of what is sometimes a long and tiring or challenging board meeting. If your board uses this process, everyone needs to commit to taking the time to do it right or not do it at all.
- **Objectivity and Candor.** Successful board self-evaluations require all participants to be candid and objective in their observations and comments. For example, if you observe that one or more board members appeared to have not thoroughly read and understood the items on a meeting agenda, when the end of meeting self-evaluation time arrives, say so. In doing so, in a collegial way, you are reminding board members that they committed to the above agreements of board self-evaluation, or other elements your board adopted.
- **Commitment to Learn and Train.** The results of the board self-evaluation should be used to reinforce board members' commitment to the success of the school and of their commitment to continuous learning. This might also mean welcoming the opportunity to participate in training by experts in the field of school governance and leadership, whether the expertise comes from fellow charter school board members or outside experts.
- **Self-evaluation Tools.** Charter school boards often use written surveys to determine individual board member's perspectives on the board's effectiveness, which are aggregated into a summary document that is (hopefully) an accurate picture of the board's effectiveness and a guide that the board will use to inform its board training calendar for the next school year. The board should take great care to develop an effective survey instrument since poorly written surveys will not provide accurate and helpful information. The board should consult a professional in the development and use of surveys prior to jumping to a self-developed instrument. In addition, many boards like to use surveys because it assigns a number to (what can be) a complicated question. However, just because the results are reported numerically does not inherently mean the survey asked a meaningful or useful question. The board should also consider gathering qualitative evidence to inform its ongoing development—in other words, evidence that does not need to be quantified to be meaningful.



Final Note: Involvement of Stakeholders in Board Evaluations

Charter school boards sometimes want to consider asking other stakeholders of the school to rate the school board's effectiveness in its governing responsibilities. (At this point, it ceases to be a self-evaluation, although the board can reflect on the data it gathers through an external evaluation process.) This sounds intuitively like a good idea and it can be in certain circumstances. However, since most stakeholders do not observe board meetings, do not generally read board meeting packets and meeting minutes, and do not see the interaction among board members or their commitment, it becomes difficult for external individuals to evaluate the board's effectiveness. Therefore, if the board asks other stakeholders their opinions as to the effectiveness of the school board, the board should think very carefully about who should be asked and about what should be asked. It is not necessarily an opportunity to air grievances but to constructively help the board improve its governing and strategic decision-making.



More resources can be found on our [website](#).

