

# Sounding Board



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## ***Initial Training for Quality Charter School Governance***

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Effective board members must understand the complexities of their school, including academic, financial, and legal challenges. Participating in ongoing training is a daunting but necessary task that helps a board fulfill its purpose and achieve its mission. This installment of *The Sounding Board* focuses on the mandatory initial training requirements that provide the foundation for effective governance.

As Dr. Brian Carpenter, an experienced leader and author on charter governance, often emphasizes: "The centrality of training people is a necessary component to helping them achieve success." He argues that board training is to school governance what fundamentals are to sports—it is impossible to field a winning team while ignoring the basics of the game. In the current legal landscape, these fundamentals are no longer just professional development; they are legal requirements and provide skills needed to serve on a public charter school board.

### **The Critical Importance of Initial Training**

For charter school boards, the stakes of governance are uniquely high. Unlike traditional districts, charter boards are the sole fiduciaries of a specific mission and a specific contract. A fiduciary responsibility is a strict legal and ethical obligation to put someone else's interests ahead of your own. As a board member, this means shifting your mindset to center the needs of the students and the good of the school. Initial training is the mechanism that helps make that shift and transforms a group of well-intentioned individuals into a high-functioning governing body. It ensures that every member understands things like the legal boundaries of the Open Meeting Law, the duty of financial oversight, and the ethical obligation to protect student data.

When board members commit to this foundational learning, they create a culture of excellence. They move from being attendees at a meeting to being stewards of an academic program that promotes student achievement. By mastering these requirements early, boards can avoid the common struggles of operational overstepping or legal missteps, allowing them to focus on what truly matters: student outcomes and the long-term viability of the school.

### **Phase 1: Prior to Being Seated**

New board members must now complete specific training topics **before** they are seated on the board. This first phase is a prerequisite for service. New members must be trained on the board's roles and responsibilities, Minnesota Open Meeting Law, and the newly added requirement: Minnesota Data Practices Law.

School directors or administrators serving in an ex-officio capacity must also complete this training within three months of their start date. By requiring this training upfront, schools ensure that every individual at the table is prepared to engage in strategic governance from their very first meeting.

## **Phase 2: First-Year Foundational Training**

Once seated, board members must complete "Phase 2" of their initial training within the first 12 months of their term. This training covers deeper operational areas: employment policies and practices (MN Chapter 181), public school funding and financial management, and the board's role in student success.

Failure to complete these six topics within the first year results in the member becoming ineligible to continue serving on the board. Furthermore, they are barred from serving on any charter school board for 18 months. Continuous learning is a way to execute your role with fidelity rather than a way to simply comply with statute.

## **Tracking Board Training**

Along with the many duties involved in charter school governance, it is easy for training deadlines to be viewed as just a year-end reporting chore. However, under current Minnesota law, tracking training is a critical function of risk management. Because the failure to complete foundational training results in the automatic ineligibility of a board member, a reactive approach to documentation can lead to sudden vacancies, loss of institutional knowledge, potential governance crises, and legal compliance issues.

In addition, [MN Stat. §124E.07 Subd.7 \(e\)-\(g\)](#) outlines that:

- (e) The organization or person providing training under paragraphs (b), (c), and (d) must certify the individual's completion of the training provided.
- (f) The charter school is responsible for covering the costs related to board training. The charter school must include in its annual report the training each board member completed during the previous year.
- (g) The board must ensure that an annual assessment of the board's performance is conducted and the results are reported in the school's annual report.

An effective practice is for boards to maintain an active, month-to-month training log to be reviewed and updated at each board meeting. Doing this allows the board to move from mere compliance to intentional development. Routine tracking also allows the Board Chair to identify upcoming deadlines well in advance,

ensuring that new members are legally cleared to vote before they are seated, and demonstrating to the school community and authorizer that the board is committed to professional excellence. Each year during the annual evaluation of the board’s performance, the board should check each member’s training status. The chart below is a template you may choose to use. It is designed to help your board track these requirements in real-time, providing a clear roadmap for a board member’s first year of training.

To support this transition, use the provided **Initial Board Training Tracking Table** as part of your candidate orientation and adopt the **Consolidated Board Training Checklist** to monitor progress throughout the first year. These tools transform legal requirements into a clear, manageable path for every new member. Additional tables formatted to track the ongoing, annual training of board members are included in OW’s Annual Report template and guidance documents.

### Sample Tracker for Initial Board Training

2025-2026	Phase 1: Prior to Being Seated			Phase 2: First 12 months of term		
	Board Roles and Responsibilities	Open Meeting Law	Data Practices Law	Employment Policies and Practices	Public School Funding and Financial Management	Board’s Role in Student Success
<b>Board Member</b>	<i>Date completed</i>			<i>Date completed</i>		

## Consolidated Board Training Checklist

This checklist is designed to help Board Chairs and Directors track compliance for new members under MN Statute 124E.07.

**PHASE 1: BEFORE BEING SEATED** *Must be completed prior to taking the oath of office or participating as a voting member.*

- Board Roles & Responsibilities:** Understanding the distinction between governance (board) and management (administration).
- Minnesota Open Meeting Law:** Requirements for public notice, quorums, and the limited reasons for closed sessions.
- Minnesota Data Practices Law:** Understanding how to handle private student and personnel data.

**PHASE 2: FIRST 12 MONTHS OF SERVICE** *Must be completed within one year of the date the member was seated.*

- Employment Policies & Practices:** Overview of MN Chapter 181 and the board's role in personnel oversight.
- Public School Funding & Finance:** Understanding state aid, audits, and the board's fiduciary duty.
- Student Success & Achievement:** How the board uses data to monitor and support the school's academic goals.

### EX-OFFICIO REQUIREMENT

- School Director/Chief Administrator:** Must complete all **Phase 1** topics within 3 months of their employment start date.