

# Fall 2015 Formative School Board Quality Standards Report



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## About the Author

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## Introduction

The United States has entered an era of unprecedented change in the governance of education. Changes include a rigorous national core curriculum, intensive teacher and principal evaluation systems, and the press for increasing accountability for the achievement of all students. The result has been a dramatic increase in pressure on governing school boards and superintendents to improve performance.

Today, the increasing demand for improved achievement and accountability in public schools creates an urgent need for school boards to clearly understand the evolving governance role of the board as it relates to the oversight of efforts to improve student learning. A school board should not only engage in a meaningful and comprehensive summative **self-assessment**, but should employ **external evaluation** that is both **summative** and **formative**.



## Balanced Governance™ Metrics for Measuring Effective Board Performance:

Evaluation metrics used in this report include 6 major areas:

- ✚ Balanced Governance™ description of board roles and responsibilities.
- ✚ Current practice of highly effective boards nationally.
- ✚ Balanced Governance 10 standards of highly effective school boards.
- ✚ Balanced Governance 10 individual school board member effectiveness characteristics.
- ✚ Focus on Goal Progress and minimize Management Inquiry
- ✚ Focus on Direct Instructional topics and minimize Supportive Instructional topics.

All 6 areas in this report are measured and benchmarked against the highest performing school boards as measured by boards that successfully support improved student achievement.

## Project Overview

### Benchmarking Constructs

The benchmarking used in this report is a school board effectiveness model described as *balanced governance*. Balanced governance is defined as any school board governance approach that discourages micromanagement of the superintendent and district staff while setting out a constructive role for the school board in monitoring student outcomes more deeply. A board engaging in balanced governance is one that strives to not only set and monitor high end-goals for student learning, but is also knowledgeable about the means used to reach those ends. Balanced Governance equips boards to better dialogue with community stakeholders, and craft targeted policy language that intelligently oversees formative progress on adopted processes and programs.



Highly effective boards are characterized by their use of a balanced approach to governance as highlighted in programs like the Iowa Lighthouse training (Delagardelle, 2015, 2008); reports on highly effective school board characteristics as described in the NSBA Center for Public Education report (2011) and Oregon School Board Association Bridges to Achievement Standards (OSBA, 2008); and substantive research on school board effectiveness (Alsbury, 2015, 2008; Walser, 2009). Constructs used as benchmarks in this Jefferson County School study are based on the collective of research-supported best practices and effective characteristics of highly effective boards linked to a balanced governance approach and improving student achievement.

## Project Methods

Jefferson County School District Board of Directors has requested an external formative analysis of 3 randomly-selected representative board meetings: one during the Fall, Winter, and Spring quarters of the 2015-2016 school year.

This current report is an assessment of the regular board meeting held on **September 14<sup>th</sup>, 2015**.

Video of this board meeting was viewed by two researchers independently. A data collection protocol was developed including the six Balanced Governance metric of effective school board performance noted earlier. All benchmarking rubrics were supported by peer-reviewed research described under Benchmark Constructs and cited in the Reference section of this report.

School board actions on the video from the 9/14/15 board meeting, totaling 2.53 hours were categorized and noted for duration by both researchers using a constant comparative analysis methodology. The researchers then met and compared analyses, yielding a 98% reliability. For the remaining 2% of variance, researchers reviewed the videotape sections in question and negotiated a common finding.

When data from Jefferson County Schools are compared to national averages, and high or low performing boards, comparatives are drawn from the 2010 NSBA National School Board survey (Hess & Meeks, 2011) and the 2013 International School Board Member Survey (Alsbury, Unpublished), as well as data from the Iowa Lighthouse Studies (Delagardelle, 2008).

## Executive Summary

The following is a summary of the recommendations to the Jefferson County school board to move toward reaching benchmarks for high performing boards in the management of time, the selection of topics, discussion foci, board role enactment, and balancing bridging (external ties) and bonding (internal ties).

### Most Urgent: Higher Priority Improvement

- ✚ Revise and enforce governing protocols for presentation content. [See pp. 12-13]
- ✚ Revise the governing policy to reduce consent agenda discussion regarding management and operational issues during the board meeting. [See pg. 13]
- ✚ Revise governing policy to reduce or avoid report requests during the board meeting. [See pp. 13-14]

### Less Urgent: Lower Priority Improvement

- ✚ Work to spend the majority of the board meeting discussing direct instructional topics and work at scheduling 70% of those topics.
- ✚ Revise existing policy to specify desired data to be included in reports.
- ✚ Increase the time spent on the strategic plan progress by expanding superintendent reports and shifting board inquiries toward checking for goal progress and away from inquiries about implementation or management detail.
- ✚ Focus board comments, questions, and requests for reports on goal monitoring. Reduce board comments, questions, and requests for reports on management inquiry.
- ✚ Increase activities and actions that reinforce and convey bonding among school board members.

### Best Practices to Maintain

- ✚ Maintain efficient board meetings that average approximately 2 hours in length.
- ✚ Maintain a manageable number of 2 topics per board meeting.
- ✚ Maintain current protocols for public speakers during school board meetings.
- ✚ Continue to support community linkages through partnerships in academic programs.
- ✚ Engage in self-assessment and external assessment using the Balanced Governance Standards. Work on improving in areas marked Developing or Growth Required.
- ✚ Engage in self-assessment and external assessment using the Balanced Governance Individual Board Member Characteristics. Work on improving in areas marked Developing or Growth Required.

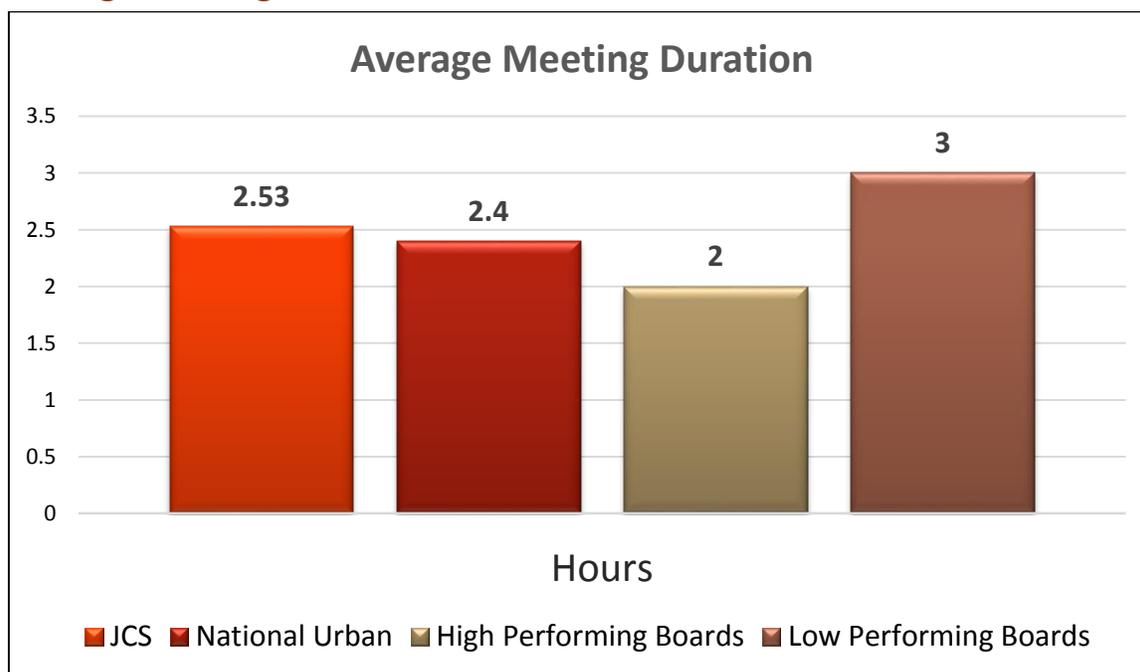
## General Data Description

### Meeting Length

The September 14, 2015 meeting totaled 152 minutes or 2.53 hours.

Jefferson County school board meetings are benchmarked for duration with the national average as well as reports from high and low performing boards from data collected in 2010 and 2013.

### Average Meeting Duration



**Benchmark:** **Developing**

### Analysis

Generally, higher performing boards are able to run their meetings in a focused and efficient manner. Avoiding inter-board conflict, public unrest, and a temptation to focus on micromanaging the details of the school district, allows effective boards to keep their meetings at around 2 hours in duration or less.

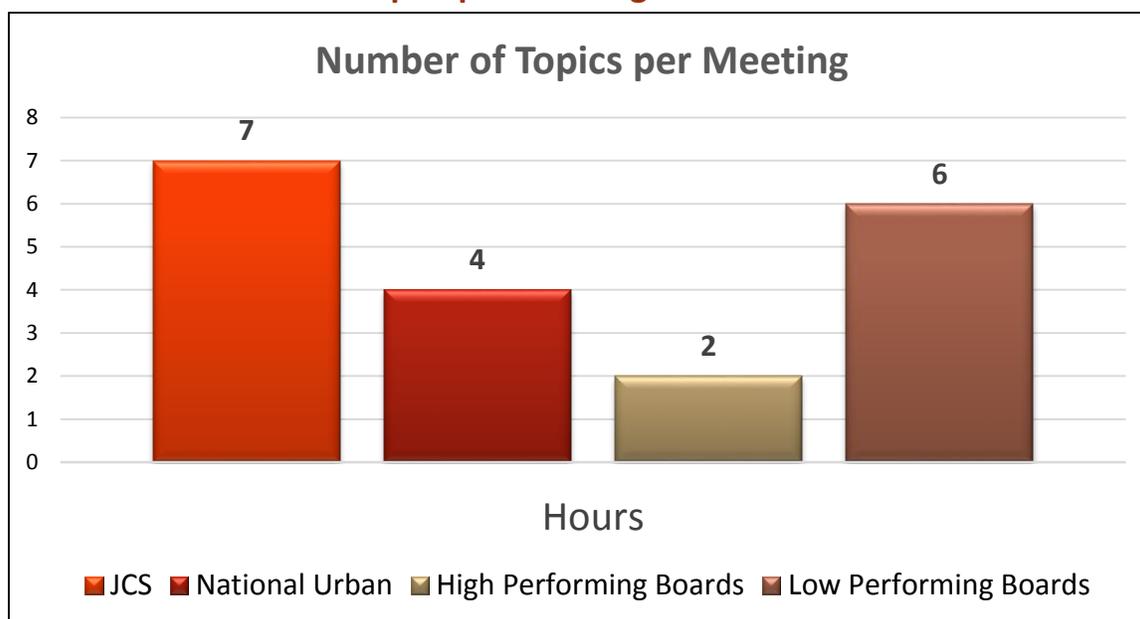
## General Data Description

### Number of Scheduled Topics

The September 14, 2015 meeting scheduled 2 topics, but the meeting processes that allow for each school board member to identify and discuss unlimited consent Agenda items (See Board Policy 1.45) effectively added 5 additional topics to the board meeting discussions. These additional topics were not insignificant as they represented nearly 12% of the total meeting time and 31% of all Board Member discussion time.

Jefferson County school board meetings were benchmarked for duration with the national average as well as reports from high and low performing boards from data collected in 2010 and 2013.

### Number of Scheduled Topics per Meeting



### Benchmark: Growth Required

#### Analysis

Generally, higher performing boards focus their discussion on a few topics that they believe represent the most significant impact on improving student achievement. Generally, low performing boards include more topics; usually focused in the realm of management issues that have little or no influence on student improvement or on debating issues due to public conflict or inter-board conflict.

## Recommendation

The board should consider improving board meeting efficiency by (1) rethinking the current approach used for staff member presentations, (2) rethinking the procedures used to select and discuss consent agenda items, (3) rethink the processes used to request “reports” from school district staff, and (4) continue to use Robert’s Rules of Order as directed in Board Policy 1.4.

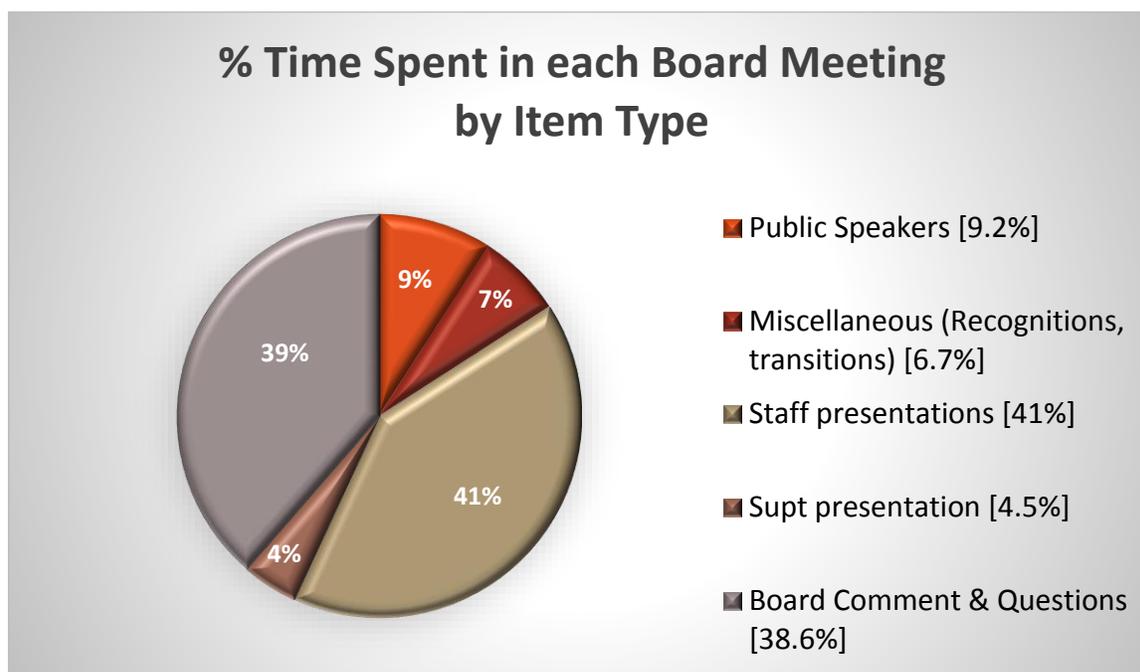
See a detailed description of these suggestions under the Time Management section of this report below.

## Time Management

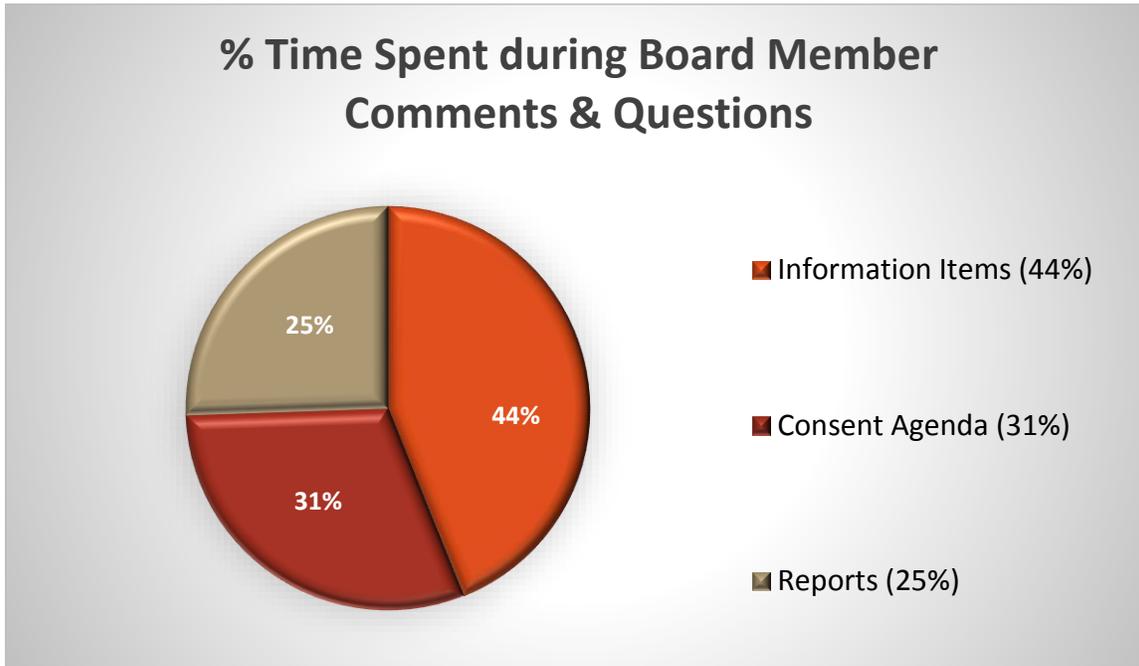
### Item Typology

The JCS board meeting was managed by a board agenda directed through Policy 1.45. The September 14, 2015 agenda included opportunities for public speakers, staff presentations, superintendent reports and remarks, board comments and questions, and miscellaneous items like recognitions, votes, board reports, and transitions between topics.

The chart below indicates the average percent of a board meeting taken up by each of these types of regularly occurring items. Notably, staff member presentation and responses to board questions comprised the majority of time spent (41%). School Board member questions and comments (38.6%) include questions or comments that followed staff presentations, as well as items pulled from the consent calendar for further discussion, and board reports at the conclusion of the meetings.



**Benchmark:** Developing



## Benchmark: Growth Required

### Analysis

Generally, higher performing boards spend most of their time discussing data provided in advance from the superintendent and staff that focus on linking program elements to specific strategic plan goals. JCS expended 56% of their “talk” time on consent agenda items and reports.

On highly effective boards, board members avoid (a) giving recommendations to adopt or eliminate specific programs, (b) giving recommendations on operational and management details on consent agenda items, (c) critiquing presentations, and (d) requesting additional operations and management data reports. Note that many of these items are addressed through more effective meeting protocols rather than through reaction or requests during the public board meeting. Consequently, in high performing boards, Board Comments constitute about 25% of the meeting while superintendent and staff presentations consume about 50%.

The superintendent presentations met standards of high performing boards; namely they did not take much of the meeting time but allowed staff experts to act as primary presenters and respondents.

## Recommendation

The board should consider improving board meeting focus by (1) rethinking the current approach used for staff member presentations, (2) rethinking the procedures used to select and discuss consent agenda items, and (3) rethink the processes used to request “reports” from school district staff.

Effective boards find ways to receive the data they want and resolve operations inquiries while avoiding making negative critique of school employees, addressing operations and management inquiries, and requesting reports and additional information at public board meetings. Studies show that this diminishes the public’s confidence in the school district and board, contributes to negative votes on bonds and levies, and reduces board member and superintendent tenure.

Indeed, this seems to be addressed in item 7 of the Jefferson County Board of Education Operating Principles which notes: “We work through the superintendent to address concerns, complaints, and the need for information. The entire Board will then be informed”.

## Alternatives

Board members certainly want to provide informed oversight and so need to ask hard questions and critically evaluate progress on district strategic goals. Here are some ways that effective boards meet this responsibility while avoiding the negative consequences noted above.

### Staff Member Presentations

- ✚ Presentation data can be prescribed by the board in advance through the use of Balanced Governance Policy Writing Protocols.

This calls for the inclusion of the following guidelines within applicable district policy:

- Measureable outcomes identified
- Specific data to be presented to the board
- Frequency and time of data presentation
- Format of data presentation
- Link strategic goal to policy

In this way, a board could indicate that a report on a particular program MUST include elements like comparisons to benchmarked districts, comparisons by school, comparisons to state results, disaggregation of specified categories, etc...

- ✚ Develop procedures to ensure that staff presentations meet prescribed criteria. For example, governing policies should be written to include these elements:
  - Presentation information should be sent to board members at least 2 weeks in advance of the scheduled board meeting.
  - The superintendent should review the data to ensure that prescribed criteria are met prior to sending the data to the school board. Items where prescribed data are not prepared should cause the agenda item to be removed and replaced.

- Upon receipt of the presentation materials, board members should review the information and communicate any changes directly to the superintendent and at least 1 week prior to the board meeting.
- ✚ Presentations might be conducted at the board meeting for the sake of the viewing public. Board member governing policy should indicate that questions and discussion center on
  - asking for details to explain **how** programs are leading to improvements or decline in targeted strategic goals,
  - asking for how staff will address areas where strategic goals have not been met,
  - asking for clarification on presented data, and
  - redirecting the superintendent to bring recommendations on revising programs that do not meet goals.

In general, discussion should focus on the Why and How of program improvement and meeting strategic goals.

### Discussing Consent Agenda Items

- ✚ Develop governing policies that include the following protocols:
  - Board members are directed to notify the superintendent of Consent Agenda Items that need further clarification or explanation.
  - The board member should meet with the superintendent to receive further information and explanation prior to the board meeting.
  - After receiving this information, any Consent Agenda Item for which the board member is still in disagreement or desires public deliberation and debate should be forwarded to the Board Chair. This supports the JCBE Operating Principle to “adhere to the practice of ‘no surprises’ for Board members or the Superintendent”.
  - Consent agenda items should be added to the agenda of the board meeting as prescribed by the rules for adding agenda items.
  - Board members should avoid requesting operations and management items be added to the agenda for public deliberation. Board member agendas should continue to “focus on advancing student achievement” as indicated in governing policy 1.45.

### Requesting Reports from Staff

- ✚ Develop governing policies that include the following protocols:
  - If the above recommendations are used, requests for additional data reports should be minimized.
  - If Board members need additional information, it should be requested through the Superintendent outside of the board meeting.

Requesting additional data during board meetings can serve as an unintended model to community constituents to end-run the chain-of-command, by-passes the board members interest to go through the superintendent, disallows the superintendent from providing the

proper avenue for the information, disallows the superintendent from sharing information with the board member that may make the request unnecessary, adds additional and unsuspected work onto the school personnel, and reinforces a culture of special interest rather than maintaining focus on district strategic goals. In other words, if the information is critical to allow the whole board to check progress on strategic plans or provide oversight, then the information should be provided to the entire board and the topic should be included on a board agenda.

## Topic Analysis

### Direct versus Supportive Instructional Topics

Topics that were either scheduled, or time-consuming topics that emerged during discussion periods, were analyzed. These topics were categorized based on whether they were considered a *direct instructional topic* versus a *supportive instructional topic*.

### Defining direct and supportive categories

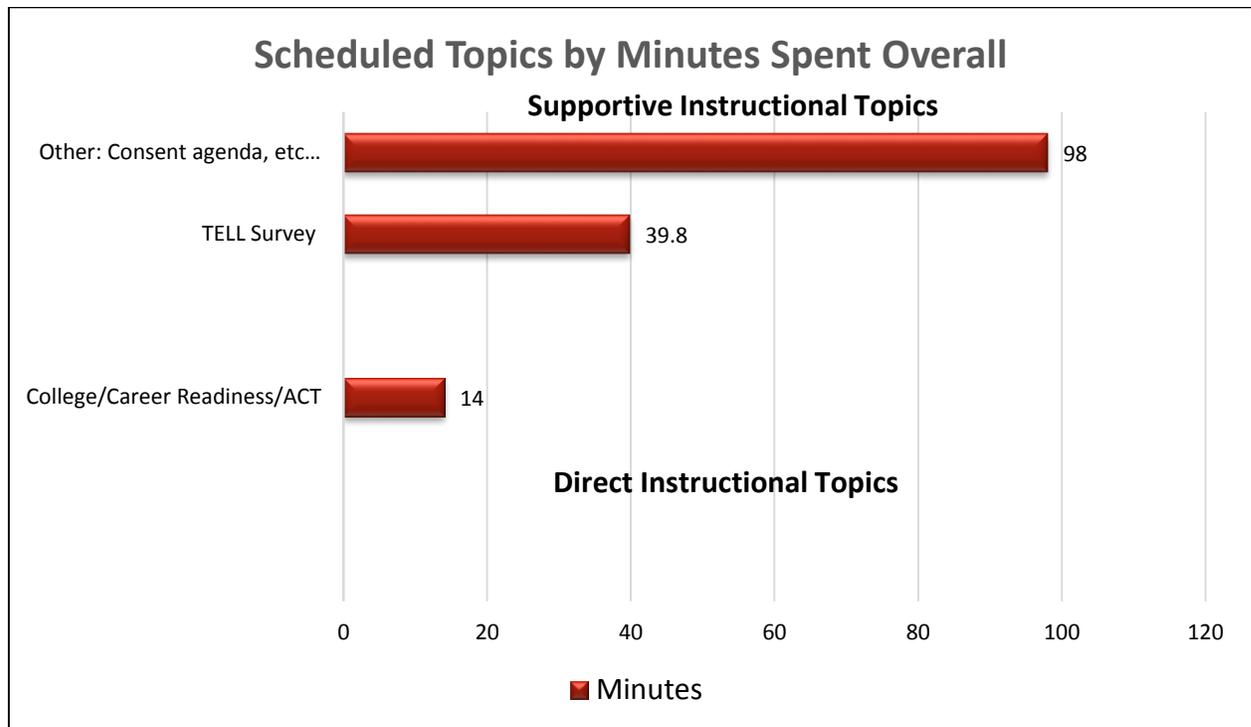
In general, a *direct instructional topic* is one that *directly impacts* student achievement, like a new instructional method or improved curricular content. A *supportive instructional topic* is one that plays more of a supportive role to improve instruction, like starting a new scheduling system, or improving community access to student progress data. Both direct and supportive topics are called instructional because, they both impact instructional improvement and consequently student achievement gains. However, it is instructive to distinguish between the two because high performing boards tend to focus more on topics that directly influence student improvement.

### Scheduled Topics Delineated as Direct versus Supportive

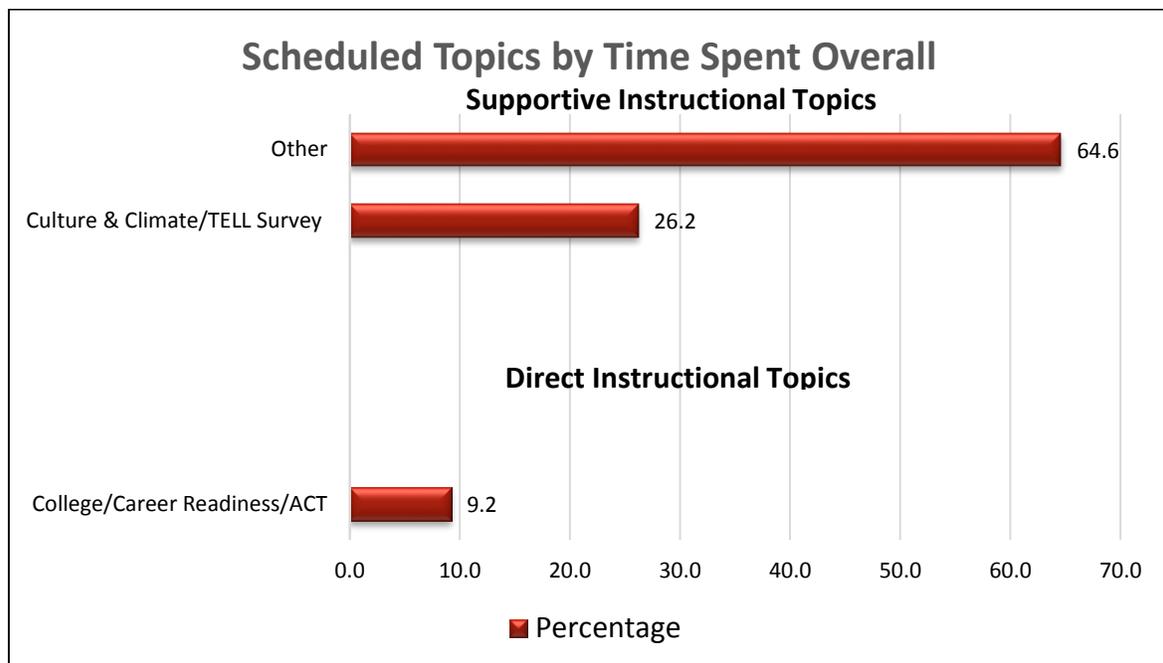
Chart A and B report specific meeting topics and show them categorized as direct or supportive instructional topics. Chart A indicates the number of minutes spent on each topic and Chart B shows the percentage of time spent on each topic. For example, under Supportive Instructional Topics, the board spent 39.8 minutes or about 26.2% of all their meeting time discussing the TELL survey results. Under Direct Instructional Topics, the board spent 14 minutes or about 9% on tracking progress on ACT results.

Chart C provides the percentage of overall time spent on direct instructional topics (9%) versus supportive instructional topics (91%).

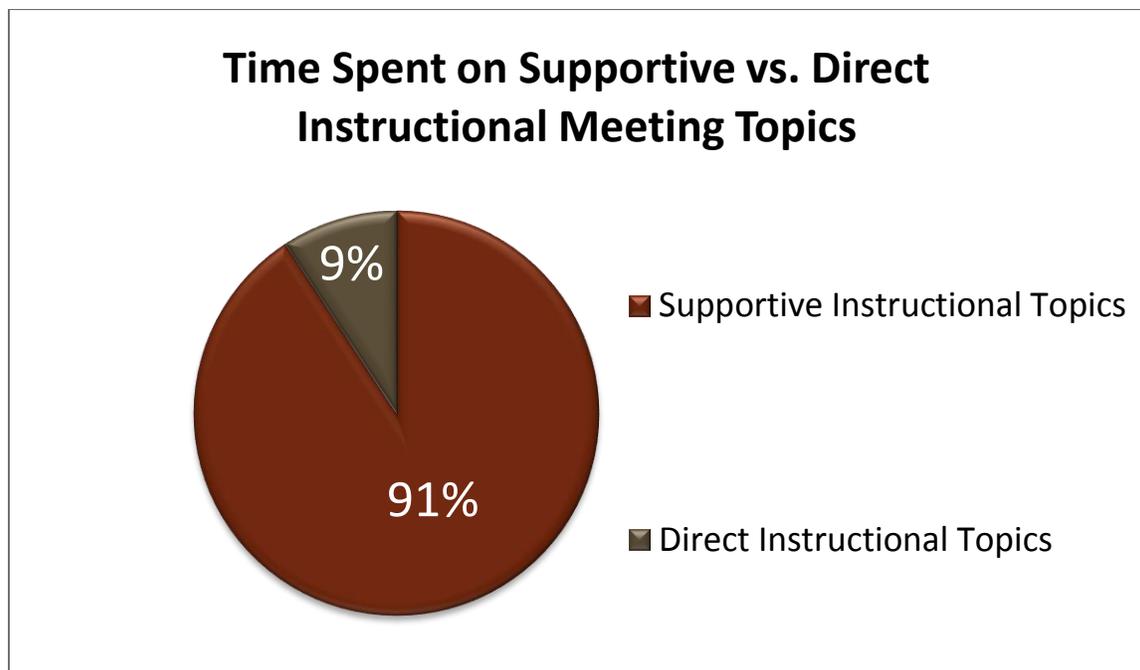
**Chart A: Meeting Time on Delineated Direct vs. Supportive Topics**



**Chart B: Percent of the Meeting Time on Delineated Direct vs. Supportive Topics**



**Chart C: Percent of Total Time on Delineated Direct vs. Supportive Topics**



**Benchmark: Growth Required**

**Analysis**

The charts above show that in the September 14, 2015 board meeting the board spent most of the meeting discussing topics that support instruction rather than influence instruction directly. High performing boards both schedule, and spend the majority of their time, on direct instructional topics with a benchmark target of 70%.

**Recommendation**

Jefferson County school board members spent only 9% of their time discussing topics directly influencing student improvement in this meeting. The board could meet the benchmark standard by focusing on scheduling fewer supportive instructional topics onto the board agenda. In addition, board members could focus on bringing up topics during discussion periods that more directly impact student improvement rather than play a supportive function.

## Board Role Analysis

### Goal Monitoring versus Management Inquiry

JCS board meetings involved significant opportunity for comments, inquiries, and discussions from school board members. Generally, these occurred in response to staff or superintendent presentations. However, in many meetings, comments, questions, and requests directed to staff members and the superintendent appeared to be in response to external influences, complaints, or concerns. When evaluated over all board meetings, 61% of discussions, comments, and requests for reports could be categorized as management inquiries, with 39% focused on goal monitoring.

### Defining Goal Monitoring & Management Inquiry

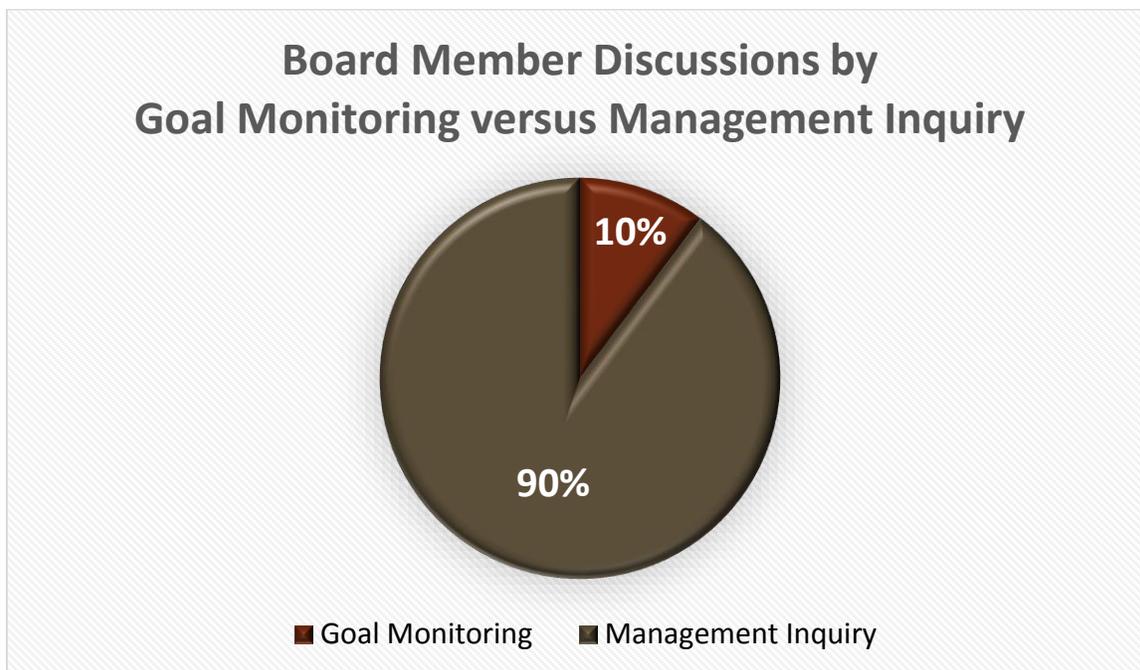
Goal monitoring is described as comments, questions, or requests for reports that focus on the following:

- Describing measurable goals from the Strategic Plan.
- Describing program details only to show how the program will reasonably meet the stated goals and/or explain the alignment of new programs on existing programs.
- Describing current performance outcomes in a way that is understandable and in adequate detail to monitor progress.
- Comparing a goal to the actual performance outcome so that gaps are evident.
- Describing program detail only to explain the reason for the gap between the goal and the performance outcome.
- Providing alternative or revised programs. Providing program details only to show how the new program or revision will improve on the outcomes.

Management inquiry is described as comments, questions, or requests for reports that focus on the following:

- Describing general program details not linked to measuring goal progress.
- Describing general program details for the purpose of general interest.
- Describing general program details for the purpose of responding to an external critic or inquiry.
- Describing general program details for the purpose of supporting a personal special interest.
- Describing general program details for the purpose of gathering evidence against someone else's personal special interest.
- Describing general program details for the purpose of critiquing or giving advice on program implementation.
- Giving critique of advice on program implementation to any staff other than the superintendent.

## Percent Time Focused on Goal Monitoring versus Management Inquiry



### Benchmark: Growth Required

#### Analysis

A primary distinguishing characteristic of high performing boards is an intentional focus on goal monitoring in all board discussions. The opposite of goal monitoring is described as management inquiry. In its extreme form, management inquiry (also known as “micromanagement”), has been linked to declining student achievement (Peterson, 2000). The JCS board engaged in goal monitoring in 10% of their discussion time in comments, questions, or requests for reports. High performing boards engage in goal monitoring 70% of the time.

High performing boards influence positive student achievement by combining the following:

- High expectations for student performance.
- Strictly monitoring the progress of student performance.
- Requiring the superintendent and staff to understand and explain why goals are not met.
- Requiring the superintendent and staff to develop and present program modifications.
- Expecting the superintendent and staff to recommend the elimination of ineffective programs
- Expecting the superintendent and staff to recommend new programs for adoption.
- Expecting the superintendent and staff to provide program details only to explain progress, or lack of progress toward district strategic goals.

## Recommendations

The JCS board should strive to meet the benchmark for high performing boards, setting a goal to engage in goal monitoring for 70% of the time. The JCS board should be intentional about reducing the number of comments, questions, inquiries, and requests for reports that fall into the category of management inquiry, using the criteria described above. This is a general procedural goal that should be applied across all topics of discussion.

## Bridging Versus Bonding

### Description

The chart below indicates the number of incidents of what is described as bridging and bonding incidents in JCS board meetings. As indicated, the JCS board engaged in approximately 3 high bridging actions and 0 high bonding actions in the meeting. High performing boards engage in an equal number of high bridging and high bonding actions. The number of actions are not prescriptive but is recommended at 1 or 2 incidents per board meeting, maintaining the 1:1 bridging-to-bonding ratio.

### Critical Relationships: Bridging and Bonding

In studies of effective board leadership among all kinds of organizational boards, findings emphasize the need for the board to gain social capital with the community they serve. The study of “network connections” among individuals, groups and organizations is critical to gaining support and stability. Most people understand that strong relationships help minimize conflict and enhance collaboration and support for organizational goals.

One facet of networking that is often missed by boards is what might be described as internal ties. Internal relationships among board members, as well as external relationships among community stakeholders are both critical in determining overall board stability and effectiveness (Saatcioglu & Sargut, 2014). Results indicate that a school board’s effectiveness in accomplishing formal objectives is an inherently combined result of the degree of bonding within the group— influencing trust, cooperation, and reputation among members—and the degree of bridging with stakeholders on the outside—fostering the group’s creativity, diversity, and capability.

### Bonding: Internal Ties

Internal dysfunction undermines productivity and aggravates turnover on school boards. High levels of bonding in groups charged with formal governance perpetuate a civic culture that enables efficient decision-making, mutual accountability and consensus. Conversely, in boards with low levels of bonding, members may function as delegates of special interests in the community rather than trustees charged with pursuing common goals that reflect shared interests. Therefore, cultivating bonding within the board plays a considerable role in facilitating educational progress. High bonding boards tend to be more effective not only in representing and implementing community preferences, but in communicating the needs and goals of the schools to the community when necessary. Finally, bonding lowers the risk of divisive power struggles and enhances the ability to develop common beliefs about objectives. Despite the importance of bonding, studies indicate that over-reliance on strong internal ties may result in conformity to a degree that is counterproductive.

Bonding incidents were measured by interactions between board members that confirmed and demonstrated openness, honesty, frequency, and willingness in information sharing. Relational aspects include acknowledging others viewpoints and team spirit. Cognitive aspects of bonding focus on shared vision, including similarity of views concerning the district’s purpose and the degree of equal participation in board processes.

### Bridging: External Ties

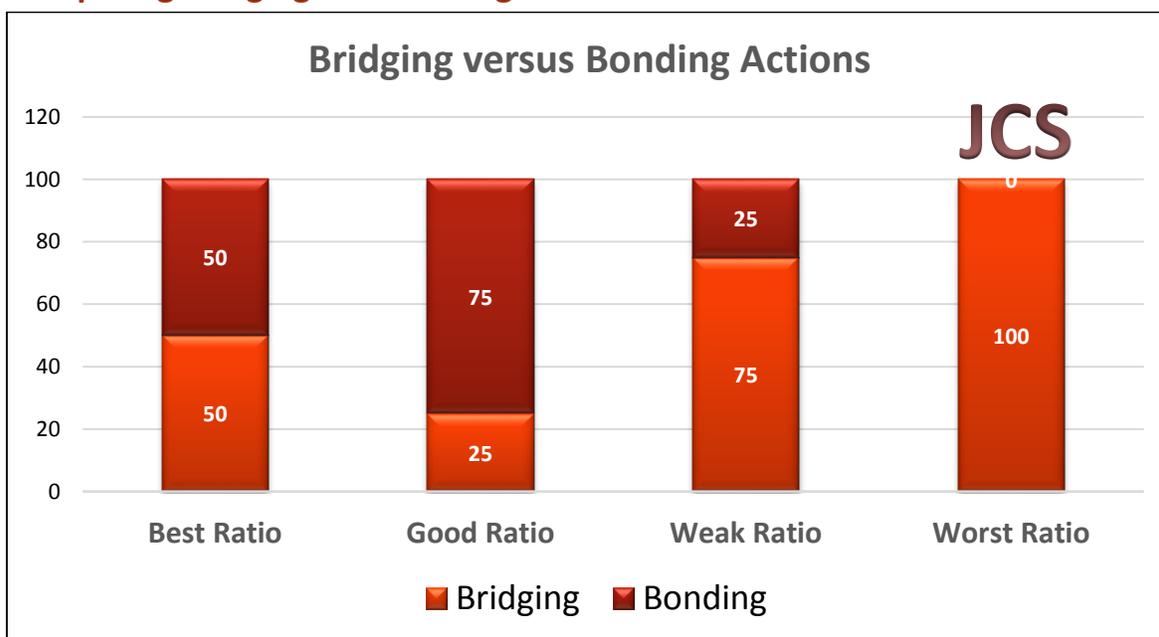
For school boards, bridging is important in forming alliances, managing uncertainty, and securing legitimacy in the eyes of external stakeholders. Strong relations between school board members and state and federal agencies facilitate the transmission of ideas to reconcile competing policy priorities. They are instrumental in securing financial and political support as well. Frequent interactions with local, state, and federal officials also help align education with other services, such as health, housing, and transportation. Finally, board member ties to businesses and universities are often beneficial, as a source of innovative strategies for school organization, financial support, and curricular adjustment and career choices for students. Likewise, the board's interactions with universities tend to be valuable in terms of new ideas for educational practices, academic progress, and teacher and staff development.

In this study of the JCS board, bridging incidents were determined by scheduled topics and discussions relating school board interactions with external actors, such as city officials, state legislators, community leaders, parent groups and universities. Another indicator was the development of partnership programs with external entities, like the development of the 5-STAR and the Louisville Linked programs.

### High Performing Boards

High performing boards consist of members strongly connected to one another, with extensive relations beyond the group. A board with high bonding and high bridging tendencies aligns members inside the board, providing a more coherent vision for bridging outside the group. Boards with high bridging and high bonding benefit from individual views of valuable projects, but are able to work together to accomplish their goals.

### Comparing Bridging and Bonding Incidents



**Benchmark: Growth Required**

## Analysis

While there is no perfectly objective way to measure bridging and bonding incidents, the benchmark associated with the highest performing boards favors boards that engage in high levels of both bridging and bonding. The next most effective method is a board engaged in lower bridging and higher bonding, followed by boards with higher bridging and lower bonding. The profile of lowest performing boards is characterized by low bridging and low bonding actions. In this board meeting, the JCS school board exhibited high bridging incidents and no bonding incidents.

## Recommendation

I believe that this in-balance was based primarily on the tenure of the discussion leaning toward a dissatisfaction over the data presented to the board. This in-balance could be resolved by the board changing its protocols for presentations, consent agenda items, and report requests as suggested in the Time Management section above.

## Balanced Governance Board Standards

### Goal(s):

The 10 Balanced Governance Board Standards include a focus on the school board and district goal of developing a culture supporting improved student performance in addition to management and operational efficiencies.

It is difficult to determine how a board meets benchmarked standards when reviewing only a single board meeting. Thus the findings noted below should be considered only if this seem to be a trend in board meetings in general. It is also crucial to remember that board behaviors are only perceived through viewable board action. Therefore, the board should work to display these standards to the general public within their board interactions.

Below the Jefferson County Public School Board of Directors was assessed on the 10 Balanced Governance Standards and each of the Indicators that often describe those Standards. The Standards and Indicators are all considered equally important to effective governance.

The marks below identify, within each Standard Indicator, when at least one board member displayed, acted, or spoke in a way that either supported or positively practiced a Standard (+) or acted in opposition to the Standard (-). In cases where no evidence was observed to determine whether the board practiced or failed to practice the effective governance standard, a “?” is used.

- + At least one board member acted or spoke in a way to positively practice this governance Standard Indicator.
- At least one board member acted or spoke in a way that showed the failure to practice this governance Standard Indicator.
- ? No evidence was observed regarding this governance Standard Indicator. Board member action or speech could neither indicate positive practice or failure to practice this particular Standard Indicator.

When evaluating a Standard, the Board can regard a Standard with a majority number of “+” marks on Indicators to be an area of Excellence or Meeting Standard. Conversely, Standards showing a high number of “-” Indicator markings indicates an areas of potential growth. The Board is encouraged to discuss ways to improve in these Standards. Indicators can provide more specific guidance on areas of improvement. Any “?” marks should not be considered as a positive or negative indicator. This simply refers to Indicators that were not observed in this particular board meeting.

## 10 Standards of Highly Effective Boards

**#1. Vision-Directed Planning.** Boards engage communities and staff in the development of a shared vision of student learning focused on student learning. The vision is the foundation of the mission and goals that direct board policy-making, planning, resource allocation and activities.

**Indicators for this element are:**

- ? 1. The board collaborates with the community to articulate core values and beliefs for the district.
- + 2. Board members can clearly articulate the vision and goals of the district.
- + 3. The board has developed a long-range plan for improving student learning.
- + 4. The board regularly monitors the progress of goals to improve student learning.
- + 5. The board adopts a budget and appropriates resources aligned to the vision and goals.
- + 6. The board establishes a culture of high expectations for all students.

**#2. Community Engagement.** All members of the community are stakeholders in the success of their schools. Community engagement is a reciprocal advocacy process that creates and sustains meaningful conversations, systems connections, and feedback loops with all groups in the community. Successful community engagement results in collaborative partnerships and new types and levels of community participation in schools.

**Indicators for this element are:**

- ? 1. The board promotes practices that solicit input and involvement from all segments of the community.
- ? 2. The board collaboratively develops vision and goals with staff, parents, students and the broader community.
- ? 3. The board recognizes and celebrates the contributions of school community members to school improvement efforts.
- + 4. The board is responsive and respectful to community inquiry and feedback.
- ? 5. The board advocates for public policy that supports education through relationships with community leaders, city and county government officials and state legislators.

**#3. Effective Leadership.** Board leadership is proactive, integrated, and distributed. Boards establish focus, direction, and expectations that foster student learning. Across education systems, boards develop and implement collaborative leadership models and practices that are guided by shared student learning goals. Within organizations, boards align authority and responsibility so that decisions can be made at levels close to implementation.

**Indicators for this element are:**

- + 1. Board members are visible in the community.
- ? 2. Board members develop relationships to improve student learning and opportunities for students.

- + 3. Board activities, analysis and decision-making are aligned to vision and goals.
- + 4. The board engages staff in decision-making processes.
- ? 5. Board members establish and sustain relationships with community leaders, city and county government officials, and state legislators.
- 6. Board members model an empowering leadership style.
- ? 7. The board enacts policies to define hiring practices that select employees who fit into the culture and core values of the district.
- 8. Board members promote change through dialogue and collaboration.
- + 9. Board members have a vision of what the district/schools can be that is greater than what is.
- ? 10. The board sets policies that incorporate thoughtful long-term leadership succession plans for all levels of leadership in the district.
- 11. Board members understand and are knowledgeable about school improvement initiatives and their role in supporting those initiatives.

**#4. Accountability.** Boards have high expectations for the learning of all students and hold themselves and their organizations accountable for reaching those results. Boards align policy, resource allocation, staffing, curriculum, professional development, and other activities with the vision and goals for student learning. The accountability process includes recognition of successes and support where improvement is needed.

**Indicators for this element are:**

- + 1. The board ensures funding to implement accountability measures.
- + 2. The board regularly conducts a self-evaluation to monitor its performance.
- + 3. The board models a culture of high expectations throughout the district.
- 4. The board's priority and focus are on curriculum, student learning, and student success.
- 5. The board appropriates resources based on student learning priorities.
- + 6. The board supports reward, consequence, and recognition systems to encourage high levels of staff and student learning.
- 7. Individual student results are measured against expectations set by district standards.
- ? 8. The board regularly conducts a superintendent evaluation to monitor progress on goals and student learning.
- ? 9. The board establishes performance goals for senior staff and itself.
- + 10. The board and all stakeholders clearly understand their roles and responsibilities in creating and supporting a culture of high expectations throughout the system.

**#5. Using Data for Continuous Improvement.** Continuous improvement is the antithesis of complacency. Boards use data and information, from multiple sources and in various formats, to identify areas for improvement, set priorities, and monitor improvement efforts. At the same time, they seek even better ways to do things the organization is already doing well.

**Indicators for this element are:**

- + 1. Board members use, and expect staff to use, a variety of types of relevant data in decision-making.
- 2. Programs approved by the board have effective data collection requirements and measurable results.
- 3. The board uses data to identify discrepancies between current and desired outcomes.
- 4. The board identifies and addresses priority needs based on data analysis and often uses comparison to other similar districts.
- 5. The board communicates to the public how policy decisions are linked to student learning data.
- + 6. The board creates a culture that encourages the use of data to identify needs throughout the system.

**#6. Cultural Responsiveness.** The cultural diversity of a community has many facets – social, economic, political, religious, geographical, generational, linguistic, ethnic, racial, and gender. Boards develop an understanding of this diversity and hold perspectives that reflect the cultures in their community. Effective community engagement and expectancy strategies build on the strengths of a community’s cultural diversity.

**Indicators for this element are:**

- + 1. Board outreach and community engagement activities accommodate cultural differences in values and communication.
- + 2. The board actively encourages and expects the superintendent to facilitate the participation of culturally diverse groups.
- ? 3. The board has a process to review policies for cultural, racial and ethnic bias.
- ? 4. Board members approach decision-making from multiple perspectives.
- ? 5. District staff is representative of the community.
- + 6. A climate of caring, respect, and the valuing of students’ cultures is established through board policy and goals.
- + 7. The board holds staff accountable for high standards and expectations for all students.

**#7. Climate.** Boards create a climate of expectations that all students can learn at high levels. Board policy-making and activities foster a positive and safe learning climate that supports the vision for student learning. The board models professional relationships and a culture of mutual respect.

**Indicators for this element are:**

- 1. The board models relationships built on trust and respect.
- 2. Board members take time to reflect and improve internal and external relationships.
- + 3. The board regularly assesses the district climate.
- + 4. The board creates a system in which high levels of student learning are expected.
- + 5. The board establishes policies and ensures practices to foster a safe, positive learning climate for students.

**#8. Learning Organizations.** A learning organization is a self-renewing professional community that supports reflection, discovery, learning, improvement, and success by staff at all levels. Boards encourage professional development that empowers staff and nurtures leadership capabilities across the organization.

**Indicators for this element are:**

- ? 1. Board policies nurture leadership capabilities across the organization.
- 2. The board creates and pursues opportunities to learn about research-based strategies to address identified problems.
- ? 3. The board understands that problem-solving involves risk-taking.
- 4. Board members promote change through dialogue and collaboration.
- + 5. The board encourages professional development that empowers staff.
- 6. The board fosters an environment of mutual cooperation, emotional support and personal growth throughout the organization.

**#9. Systems Thinking.** Systems thinking allows boards to break out of the box of single district thinking and act on an integrated view of education within and across systems and levels (e.g. K-12, ESD, community college, and university). Boards that practice systems thinking open the door for collaborative local, state, and national partnerships, coordinated programs, and shared resource models to improve student learning.

**Indicators for this element are:**

- ? 1. The board and leadership team work to avoid shifting problems from one part of the system to another.
- + 2. The board encourages an organizational structure which enables creative processes.
- 3. The board and leadership team engage in process thinking, seeing beyond the immediate situation and easy solutions.
- 4. The board and leadership team analyze issues for their impact on other parts of the system.
- ? 5. The board and leadership team take responsibility for solving problems and avoiding blame as a solution.
- ? 6. The board shares information with board members from other education systems and levels.

**#10. Innovation and Creativity.** Innovation and creativity are assets to the process of development and change, leading to new types of thinking and better ways of meeting student needs. Innovation and creativity are not predictable, but can flourish when boards align vision throughout the organization, engage in collaborative partnerships, and encourage dialogue, new ideas, and differing perspectives.

**Indicators for this element are:**

- ? 1. Board members create time and opportunities for their own creative thinking.
- + 2. Board members partner with community and educational organizations to remove real and perceived barriers to creativity and innovation.
- 3. The board sets meeting agendas that allow it to proactively identify and explore strategic issues.

- ? 4. The board incorporates flexibility into its future plans to enable the district to look and move in unforeseen directions in response to unexpected events.
- ? 5. The board sets policies creating informed and aware employees at all levels in order to seize the opportunities presented by unexpected events.
- + 6. The board recognizes the risk inherent in creativity and innovation and promotes employee knowledge, awareness, creativity, self-initiated action and experimentation.
- + 7. The board supports creative and innovative practices at all levels of leadership

### Analysis

The following is a snapshot from a single meeting assessing the board's impressions, actions, and behaviors when compared to the Balanced Governance Standards. It should be noted that actions by a single board member can result in a negative (-) mark. In addition, it is important to note that the actions of others (community and staff members) can affect the ratings on some Standards. For example, in this board meeting, the Use of Data Standard was given a negative (-) mark because the necessary data was not made available to the board members by the staff to allow for more productive deliberation by the Board. While this was not caused by Board members, it does indicate an area that the Board needs to ensure is improved upon for future board meetings.

**#1. Vision-Directed Planning: Meets Standard**

**#2. Community Engagement: Meets Standard**

**#3. Effective Leadership: Developing**

**#4. Accountability: Developing**

**#5. Using Data for Continuous Improvement: Growth Required**

**#6. Cultural Responsiveness: Unknown**

**#7. Climate: Developing**

**#8. Learning Organizations: Growth Required**

**#9. Systems Thinking: Developing**

**#10. Innovation & Creativity: Developing**

## Effective Individual Board Member Characteristics

### Goal(s):

These 10 individual board member characteristics have been linked to improving or declining student performance. They also include four core board beliefs that lead to most board member and superintendent conflict.

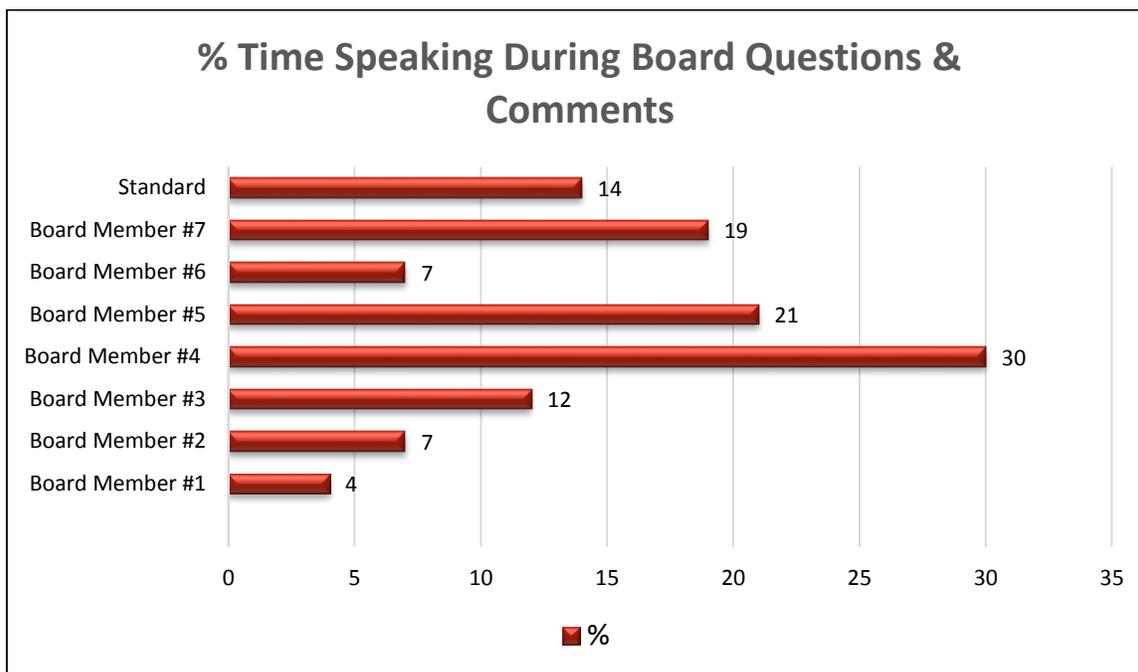
Research findings on school board effectiveness can be applied to individual board member characteristics and beliefs. More specifically, studies give us a clue as to the individual characteristics that are seen in stable and more effective school boards.

Board Member Characteristic	Brief Description	Practical Description	Proficiency Level
1. Role Boundaries	Understands the difference between the role of <b>informed oversight</b> and <b>over-reach</b> .	If confronted by a parent in the store, the board member can explain school needs, applied interventions, and current success data. Avoids generalities or playing the role of cheerleader or critic.	___ Growth Required __X_ Developing ___ Proficient ___ Distinguished
2. Role Orientation	An <b>open dialogue</b> orientation focuses on general interests and welcomes various viewpoints, but expects unanimous support of final board decisions. An <b>open debate</b> orientation focuses on activism and special interests, values individual viewpoints over collective consensus, and doesn't expect support of final board decisions.	The board member seeks out input from multiple and varied stakeholders and seeks open dialogue. However, when conflict arises, the board member has the wisdom to maintain order by discouraging contentious communication tactics.	__X_ Growth Required ___ Developing ___ Proficient ___ Distinguished
3. Advocacy Focus	A <b>position</b> is often polarizing and identifies "friends" versus "enemies". An <b>interest</b> is discovered through conversation to get to shared solutions that can be applied to many students and achieved through various means.	The board member seeks to understand the multiple and varied positions of district constituents but seeks a solution that can address the common interest. For example, a board member can support a position of improving achievement for underperforming students without focusing exclusively on only one cause of low achievement (i.e. cultural insensitivity).	__X_ Growth Required ___ Developing ___ Proficient ___ Distinguished
4. Student Concern Focus	Supports a <b>broad</b> focus on student concerns. A stated responsibility to insure all students are afforded opportunities to succeed. Avoids a <b>targeted</b> focus on providing opportunities for single groups of students.	The board member avoids focusing only on a narrow agenda of student issues and needs. Board member avoids focusing only on particular student demographic groups and issues.	__X_ Growth Required ___ Developing ___ Proficient ___ Distinguished

5. Solution Focus	The understanding that the local school district, and each school has <b>unique and shifting needs</b> ; often requiring <b>innovative solutions</b> .	The board member avoids adopting standardized, one-size-fits-all programs and focuses on identifying unique district needs. The board member avoids promoting standardized solutions and prefers to design a solution to fit the unique need of each district as supported by data evidence.	<input type="checkbox"/> Growth Required <input type="checkbox"/> Developing <input checked="" type="checkbox"/> Proficient <input type="checkbox"/> Distinguished
6. Exercise of Influence	The board member understands they possess <b>no individual authority</b> . Power rests in the board as a group only.	The board member avoids communicating directives or interests to individual school district employees. Visits to schools are unobtrusive, informational, and as part of established activities (sports, open house, school events).	<input type="checkbox"/> Growth Required <input checked="" type="checkbox"/> Developing <input type="checkbox"/> Proficient <input type="checkbox"/> Distinguished
7. Use of Voice	Does the board member use their voice to <b>tell and sell</b> their position or do they seek to <b>hear and understand</b> interests, and come to resolution and reconciliation.	The board member avoids over-talking to promote their own interest. They do not see communication as a competition. They promote civil dialogue with a goal to listen and discover a resolution that serves all interests.	<input type="checkbox"/> Growth Required <input checked="" type="checkbox"/> Developing <input type="checkbox"/> Proficient <input type="checkbox"/> Distinguished
8. Use of Power	<b>Power Over</b> is using your position to get your own way through threat or reward. <b>Power With</b> is using your position to ensure all voices are heard and collaborative solutions are guaranteed.	The board member uses their power to ensure that all needs are heard and that solutions meet multiple interests. They would not attempt to push only their own solutions or highlight only their own needs and interests.	<input type="checkbox"/> Growth Required <input checked="" type="checkbox"/> Developing <input type="checkbox"/> Proficient <input type="checkbox"/> Distinguished
9. Decision-making Style	Decision-making can be done <b>individually</b> or can be done <b>collaboratively</b> with and through others.	The board member seeks to evaluate data to confirm issues and needs, then ensure that proposed solutions and measures fit the stated needs and goals.	<input type="checkbox"/> Growth Required <input type="checkbox"/> Developing <input checked="" type="checkbox"/> Proficient <input type="checkbox"/> Distinguished
10. Motivation for Service	Board members can serve for <b>personal</b> or for <b>altruistic</b> reasons.	Board members do not run for reasons of personal ego or prestige, a need for involvement, to correct a personal concern, to replace particular school employees, or as a step to future office. Board members run to serve the community, to fulfill a democratic responsibility, and to serve all students and all needs.	<input type="checkbox"/> Growth Required <input type="checkbox"/> Developing <input type="checkbox"/> Proficient <input checked="" type="checkbox"/> Distinguished

## Use of Voice

While many of the individual board member characteristics are difficult to measure in a single board meeting, one that was more measurable and evident was use of voice. The following chart indicates the amount of time each board member spoke during the single board meeting.



### Analysis

The data must be analyzed through the context of the board's individual relationships and perceived level of access in order to draw reliable conclusions. However, on the surface it is evident that 3 of 7 board members dominate the board time, using 70% of the available discussion time. Indeed, Board member #1 spoke for only 2.35 minutes, Board Member #2 & #6 for 4.4 minutes each, and Board Member #3 for 6.88 minutes. Board Member #4 spoke for 17 minutes. This board may want to consider steps to ensure that all members of the board are receiving adequate and balanced time to comment and that some board members are not taking too much of the time.

### Recommendation

The board chair should continue to use Robert's Rules to conduct board meetings as established in governance policy 1.45. In addition, the board chair should consider using more structured approaches to sharing, like a round robin approach where each board member is asked to share one-by-one and randomly rather than always through volunteering comment. This could be most effective during discussions of general instructional topics that would interest all board members.

Overall, all board members only spoke for 25.8 minutes during the informational items with two board members dominating that time. This also speaks to a need to increase time for the board to discuss direct instructional topics and goal progress checking by reducing the talk time for consent agenda items and other non-instructional issues. This “other” talk constituted 33 minutes during the meeting.

## Further Reading

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