



School District Governance Team Board Self-Evaluation Survey

Overview

One of the primary ways a governance team can strengthen or maintain its effectiveness is to periodically assess its own performance. A governance team self-assessment provides the opportunity to step back and reflect on how well it is meeting its responsibilities. This governance team self-assessment will provide the board and superintendent with valuable perception data, revealing the range of perceptions among board members regarding the performance of the board and the governance team.

Individuals will rank the performance of the board and governance team on important characteristics. CSBA determined these characteristics through collaborative efforts with board members from around the state—who defined the *CSBA Professional Governance Standards* for boards; and through our experiences providing board development to school boards across California for more than 30 years.

Content

The evaluation is divided into two parts. Part one consists of questions regarding the conditions of effective governance. Part two contains questions that address the board's five major responsibilities. For each statement, Individuals should select the descriptor that most accurately describes the extent to which the board demonstrates the quality or characteristic.

Part I – Conditions of effective governance

To effectively focus all district efforts on student learning and achievement for all students, a governance team needs to have a unity of purpose, a mutual understanding of roles and responsibilities, positive behaviors and working relationships, and supportive structures and processes.

Unity of purpose. A unity of purpose is clear and unambiguous common ground that serves as the foundation for all board efforts.

The board and the superintendent...

1. are focused on learning and achievement for all students.
2. are committed to a common vision and agree on what they want to accomplish as a team.
3. stay focused on the district's priorities.
4. work well together as a governance team.
5. commit the time and energy necessary to be informed and effective leaders.
6. allow majority decisions of the board to set the direction for the district, refraining from undermining those decisions even when individual views may differ from the majority decision.

Governance team roles and responsibilities. The board and superintendent clarify and value their respective roles and responsibilities and commit to operating within those roles.

7. Governance team members agree on the role and responsibilities of the board and the superintendent.
8. Individual board members refrain from making commitments on behalf of the entire board.
9. Board members keep confidential matters confidential.
10. The board gives direction to the superintendent only at publicly noticed meetings of the board, and individual board members do not attempt to exercise individual authority in directing the superintendent or district staff.
11. The board understands its governance responsibilities are to set the direction and provide a policy and accountability framework for the district, not to perform management functions.

Governance team culture. Effective governance teams adopt written agreements—norms—that define standards of behavior and each member commits to abide by them.

12. The board communicates with the superintendent in a climate of trust and mutual respect.
13. The board assumes collective responsibility for board conduct, behavior and conflict management.
14. The governance team actively uses and abides by written agreements on how they will act towards each other and others when working as a group.
15. Governance team members operate openly, with trust and integrity and treat everyone with civility and respect.
16. Members of the governance team listen to each other in order to understand the other person's perspective.
17. The board and superintendent avoid surprises at meetings by discussing questions in advance whenever possible.

Governance team operations. Board bylaws are the formally adopted policies by which boards govern. Effective teams adopt written protocols that provide the necessary specificity that guide governance team operations. These protocols often address areas that include: communicating with the superintendent and staff, preparing meeting agendas, and conducting board meetings.

18. The board governs within board-adopted policies, bylaws and protocols to manage board operations.
19. Board members receive adequate and timely information to render informed decisions.
20. All board members receive the same information.
21. Governance team members agree on how board members will request clarifying or additional information about agenda items.
22. Governance team members agree on how to bring up new ideas.
23. Governance team members agree on how concerns from the community will be handled.
24. The governance team creates opportunities for the diverse range of views in the community to inform board deliberation.

Board meetings. School boards exercise their governance authority *only* at publicly posted meetings. The board's effectiveness in governing the district is directly related to its ability to conduct effective board meetings.

25. The governance team has discussed and agreed upon the role of the board president.
26. Board meeting agendas reflect district priorities and goals, and are used to focus board meetings.
27. Board members come to meetings prepared.
28. The board effectively uses data as a component of its decision-making process.
29. The board confines its meetings to a reasonable length of time.
30. There is a good relationship between how long the board spends on an agenda item and the importance of the item.
31. The board effectively guides community input in a manner that balances the importance of inclusiveness and the board's need to conduct effective and efficient meetings.

Governance leadership development. Effective governance teams commit to continuous improvement in their performance and plan for inevitable changes in the membership of the team by planning for smooth transitions.

32. The board agrees on the process for identifying officers.
33. The board demonstrates a commitment to continually improve governance efforts by planning for the development and training of its members.
34. The governance team implements an effective process for orienting new members to district operations, board operations, district priorities & goals, and the superintendent evaluation process.

35. The governance team reviews its governance agreements regularly and provides opportunities for new team members to provide input.

Part II – Board responsibilities

Part II focuses on the board's five major responsibilities: setting direction, establishing the structure, creating a supportive environment, ensuring accountability and demonstrating community leadership.

Setting direction. Effective governance teams reach agreement on the educational philosophy, vision and long-range goals that focus district efforts on improving student achievement for all students.

The governance team...

36. ensures community participation when developing the district's mission, core beliefs and vision.
37. effectively develops and adopts long-range priorities and annual goals.
38. uses the district's mission, core beliefs and vision to drive district performance and improve student achievement.
39. effectively develops and adopts clear and measurable indicators to assess progress towards priorities and goals.

Establishing the Structure. Effective governance teams align policy documents and district resources in order to achieve the district's vision, priorities and goals.

40. The board adopts a fiscally responsible budget aligned to the district's vision and goals.
41. The governance team regularly monitors the fiscal health of the district.
42. The governance team has an effective process to review, revise and adopt policies that align with the district's vision and goals and are consistent with the law.
43. The board establishes priorities for the district's collective bargaining process that support the district vision and goals.

Create a Supportive Environment. Effective boards promote and support the district mission, vision and priorities through word and deed by creating a climate of excellence that empowers and excites the school community to raise student achievement.

44. The board effectively demonstrates commitment to district priorities and goals.
45. The board effectively demonstrates support for the superintendent in carrying out board directives.
46. The board attends and participates in key district events.
47. The board celebrates student successes and staff accomplishments.
48. Board members avoid undermining the board's majority decisions.

Ensure Accountability. Effective boards ensure accountability by evaluating themselves and the superintendent, based on the accomplishment of district goals.

The board effectively...

49. monitors student progress against established benchmarks.

- 50. monitors progress towards district goals based on established success indicators.
- 51. monitors the implementation of the adopted budget.
- 52. monitors the implementation of board policies.
- 53. evaluates the performance of the board.
- 54. evaluates the performance of the superintendent based on established expectations.

Demonstrate Community leadership. Effective boards have positive and productive relationships in the community that strengthen support for the district, create partnerships, build civic capacity, and engage the community in order to advance the goals of the district.

The board...

- 55. uses cohesive messages to communicate district priorities, goals and needs.
- 56. provides community leadership on educational issues.
- 57. pursues partnerships to support district efforts.
- 58. advocates on behalf of students and public education at the local, state and federal levels.
- 59. informs and educates the community on district priorities, progress, needs and opportunities for involvement.

If we can you assist you in this process, please call us. We're here to help.

Renata Hoffman
California School Boards Association
(916) 669-3293
e-mail: rhoffman@csba.org
website: bse.csba.org