SCHOOL BOARD GOVERNANCE

THE ART OF ASKING THE RIGHT QUESTIONS

Candace L. Sorensen
CS3 LAW PLLC
OVERVIEW

• ABCs of Board Work

• Key Performance Indicators

• Dashboards that Tell the Story

• Q&A
“Governance is not about budget lines, personnel issues and field trip approvals. It is about values and vision and strategic leadership.”

- John Carver

Boards that Make a Difference
ABC Oversight

• Academics
• Budget (Finance)
• Climate/Culture
Governance vs. Management

- Focus on the ends (the what)
- Delegate (the how)
- Monitor (did it work?)
Board Committees

• Academic Excellence
• Finance
• School Climate/Culture
• Governance
ABC Oversight: Academics

Job: Ensure that the students are being well educated

- Establish expectations
- Monitor student proficiency
- Monitor student growth
ABC Oversight: Budget

Job: Ensure that dollars are being well spent

• Establish expectations

• Allocate resources/support to achieve goals
ABC Oversight: Climate/Culture

Job: Ensure that conditions exist for excellent teaching/learning

- Establish expectations
- Teacher qualification/satisfaction
- Classroom management
- Family and Student engagement
Governance vs. Management

Ask the big questions:

• What are our goals/expectations?
• Are we meeting them?
• If not, why not?
• What strategies will help us moving forward?
How to Assess Performance?

- Identify key performance indicators
- Determine frequency of reporting
- Evaluate data
- Provide feedback/direction
KEY PERFORMANCE INDICATORS

- A performance measure

- A compass

- An important data point
EFFECTIVE KPIs

- **well-defined and quantifiable**
- **well communicated**
- **crucial to achieving your goal**
- **And... not too many!**
BOARD WORK: IDENTIFY

- **KPIs that help you monitor**
  - Academic performance
  - Budget/Fiscal accountability
  - Climate/Culture

- **Frequency of Reporting**

- **Data history desired (longitudinal)**
SCHOOL LEADERSHIP WORK:

- *Create the Dashboards to Provide KPIs to the Board on a Regular Basis*

- *Explain variances*
Comparison of Roles: Academic Performance

School Administration          Board of Directors

Develop Realistic Educational Goals
## Comparison of Roles: Academic Performance

<table>
<thead>
<tr>
<th>School Administration</th>
<th>Board of Directors</th>
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</thead>
<tbody>
<tr>
<td>• Develop reports to demonstrate progress toward academic goals</td>
<td>• Assess progress in achieving educational goals</td>
</tr>
<tr>
<td>• Explain areas of deficiency</td>
<td>• Review performance data and identify academic areas that need corrective action</td>
</tr>
<tr>
<td>• Develop and implement corrective action plans</td>
<td>• Monitor corrective action plans</td>
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Comparison of Roles: Fiscal Accountability

School Administration          Board of Directors

Set funding priorities
## Comparison of Roles: Fiscal Accountability

<table>
<thead>
<tr>
<th>School Administration</th>
<th>Board of Directors</th>
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<tbody>
<tr>
<td>Develops proposed budget and budget amendments</td>
<td>Approves budgets and amendments</td>
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<tr>
<td>Controls expenditures in accordance with the budget</td>
<td>Monitors revenues and expenditures</td>
</tr>
<tr>
<td>Reports on revenues/expenses</td>
<td>Questions variances</td>
</tr>
<tr>
<td>Explains variances</td>
<td>Authorizes variances through budget amendments</td>
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</tbody>
</table>
Comparison of Roles: School Climate/Culture

School Administration          Board of Directors

Identify key aspects of successful school culture
Comparison of Roles: School Climate/Culture

School Administration

- Develops school culture consistent with board policy
- Reports to Board on various aspects of school culture
- Monitors stakeholder satisfaction

Board of Directors

- Sets policy to govern school culture
- Monitors climate/culture
- Challenges school to be intentional
Board Work: Monitor

ACCOUNTABILITY DASHBOARDS

Academics • Budgets • Climate

All need effective dashboards
to present KPIs with efficiency
USEFUL DASHBOARDS?
Characteristics of Good Board Information

- Concise
- Meaningful
- Timely
- Relevant to Responsibilities
- Best Available
- Graphic Presentation
DO YOUR CURRENT DASHBOARDS:

• Track the KPIs the Board thinks are important?

• Allow you to see and celebrate areas of strength?

• Allow you to see and question areas of weakness?
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<tbody>
<tr>
<td>Number of students</td>
<td>536</td>
<td>524</td>
<td>574</td>
<td>603</td>
<td>627</td>
<td>622</td>
<td>622</td>
<td>643</td>
<td>21</td>
<td>69</td>
</tr>
<tr>
<td>Number of classrooms</td>
<td>22</td>
<td>23</td>
<td>24</td>
<td>25</td>
<td>25</td>
<td>25</td>
<td>25</td>
<td>--</td>
<td>--</td>
<td>1</td>
</tr>
<tr>
<td>students/classroom</td>
<td>24.3</td>
<td>22.8</td>
<td>24</td>
<td>24</td>
<td>25</td>
<td>25</td>
<td>25</td>
<td>25.7</td>
<td>.7/class</td>
<td>--</td>
</tr>
<tr>
<td>Per Pupil Funding</td>
<td>$7,244</td>
<td>$7,326</td>
<td>$7,416</td>
<td>$7,536</td>
<td>$7,536</td>
<td>$7,536</td>
<td>$7,536</td>
<td>$7,636</td>
<td>$100/pp</td>
<td>$220/pp</td>
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<tr>
<td>State Aid</td>
<td>3,848,926</td>
<td>$3,778,263</td>
<td>$4,191,679</td>
<td>$4,463,733</td>
<td>$4,633,326</td>
<td>$4,598,219</td>
<td>$4,598,373</td>
<td>$4,820,349</td>
<td>$222,130</td>
<td>$628,670</td>
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<tr>
<td>Overall Revenues</td>
<td>5,617,407</td>
<td>$5,773,660</td>
<td>$5,985,006</td>
<td>$6,050,330</td>
<td>$6,237,271</td>
<td>$6,283,473</td>
<td>$6,014,502</td>
<td>$6,222,397</td>
<td>($61,076)</td>
<td>$237,391</td>
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<tr>
<td>Spending on Basic Instruction</td>
<td>1,847,856</td>
<td>$1,845,104</td>
<td>$2,007,872</td>
<td>$1,913,762</td>
<td>$2,016,902</td>
<td>$2,050,231</td>
<td>$1,960,245</td>
<td>$2,009,511</td>
<td>($40,720)</td>
<td>$1,639</td>
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<tr>
<td>Spending on Added Needs</td>
<td>$655,983</td>
<td>$759,086</td>
<td>$821,278</td>
<td>$758,867</td>
<td>$896,920</td>
<td>$856,501</td>
<td>$759,942</td>
<td>$724,992</td>
<td>($131,509)</td>
<td>($96,286)</td>
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<tr>
<td>Spending on Special Ed</td>
<td>$162,376</td>
<td>$161,948</td>
<td>$213,435</td>
<td>$246,861</td>
<td>$253,710</td>
<td>$249,386</td>
<td>$205,962</td>
<td>$284,230</td>
<td>$34,844</td>
<td>$70,795</td>
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<tr>
<td>Over/Under Budget</td>
<td>($389,818)</td>
<td>($243,275)</td>
<td>($59,982)</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>($229,970)</td>
<td>--</td>
<td>--</td>
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</tr>
<tr>
<td>% variance</td>
<td>(12.75%)</td>
<td>(8.1%)</td>
<td>(1.9%)</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
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</tr>
<tr>
<td>Per pupil spending on instruction</td>
<td>$4974</td>
<td>$5279</td>
<td>$5301</td>
<td>$4842</td>
<td>$5052</td>
<td>$5074</td>
<td>$4704</td>
<td>$4,695</td>
<td>($379/pp)</td>
<td>($606/pp)</td>
</tr>
<tr>
<td>% of Revenue spent on instruction</td>
<td>47%</td>
<td>48%</td>
<td>50.8%</td>
<td>48%</td>
<td>50.8%</td>
<td>50.2%</td>
<td>48.6%</td>
<td>48.5%</td>
<td>(1.7%)</td>
<td>(2.3%)</td>
</tr>
</tbody>
</table>
Your Turn!

Use the KPI Worksheet and identify:

- KPIs you currently monitor
- KPIs you think are important
“You don’t need more data. You need greater power over it.”

- **visualization tools**

- **a clear picture of where you’ve been and where you’re heading**

- **allowing you to easily see trends**
Closing with the obvious:

*Board meetings need time to focus on governance matters*
THANK YOU!

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Candace L. Sorensen
616.717.5742
csorensen@cs3law.com