

# Effective Board Practices:

An Inventory for School Boards

## Suggested Methods for Discussing Results

*Effective Board Practices: An Inventory for School Boards* is designed so that the board-superintendent team working alone or with other key administrators can use it to assess where they are compared to the practices outlined in the Inventory and to determine their next steps for improvement. An outside facilitator is not necessary. However, the team may use one if the team believes it will help the discussion. The process described below will help the team to fill out and discuss the Inventory results.

### Before the Meeting

**People Involved:** The entire board and superintendent team should complete the Inventory. It is helpful if everyone completes the Inventory before the discussion; however, filling out the Inventory can be incorporated into the workshop discussion, if necessary.

**Session Type:** A meeting of the board and superintendent to complete the Inventory and discuss findings must be posted in accordance with the Texas Open Meetings Act. The discussion should be conducted as an open meeting. If it becomes necessary to discuss the job duties or actual performance of individual members of the board-superintendent team, that portion of the discussion may be conducted as a closed meeting. It is best to consult with your district's attorney about going into a closed meeting.



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**Materials Needed:** At least a week before the discussion meeting, provide the entire board-superintendent team with a copy of *Effective Board Practices: An Inventory for School Boards*. At the meeting, the team might like to have a copy of board agendas and minutes from meetings of the preceding 12 months, any existing board operating procedures, board activity calendars, a copy of the district’s vision and goals, and the board policy manual.

### **During the Meeting**

**Time Required:** It generally takes two to four hours for the board-superintendent team to complete the Inventory, discuss the results, and determine next steps for further action.

#### **Discussing the Results:**

1. If the entire board-superintendent team hasn’t completed the Inventory before the workshop, allow individuals time to do so before beginning the discussion.
2. To begin the discussion, go through the Inventory sequentially to determine if the entire team said “Yes” to each criteria and item. Start with the criteria (i.e., a, b, c) and then the corresponding item (1.1). Use the Tally Sheet on page 4 to check off the criteria and items that all members of the team said “Yes” to during the discussion.
3. If there are criteria and items that some, but not others, believe can be checked “Yes,” allow those who didn’t check “Yes” to explain their reasons for doing so. Then allow those who did check “Yes” to explain their reasons for doing so. Following the discussion, determine if there is unanimous agreement that the criteria or item can be checked “Yes.” Lack of consensus means the board cannot check “Yes” to the criteria or item.
4. At the end of the discussion, make sure to note on the Tally Sheet which items and criteria the team was able to check “Yes” to during the discussion. (You may find it useful to visually display this information in some way. This may be done on a flip chart, a white board, or by giving a copy of the Tally Sheet to the entire board-superintendent team.)

**Determining Next Steps:** To facilitate the next section, allow each member to review the Inventory individually when you ask:

- Which items and criteria that are not checked “Yes” are the most important for the team to complete?
- Which items and criteria do you believe would help the board-superintendent team improve the most?

Once all members have had time to review the Inventory individually, it is time to begin discussion. One method to expedite the process is to allow each member of the team to vote on the items he or she believes are the most important. To do this, give each member a number of votes and instruct them that they can use only one vote per item. Note, votes for each member should be no more than half of the items and criteria that are not checked “Yes” (i.e., if there are 16 unchecked items and criteria, members would get eight votes or less). Go down the list of unchecked items and criteria and ask people to vote. Make note of the number of votes below the items and criteria on the Tally Sheet.

Once all the votes are in, you can use those with the highest number of votes as a starting point for further discussion.

Ask the group:

- What steps will we need to take to complete our top priority items and criteria?
- What other steps do we need to take?

Make sure that notes are taken during the course of the discussion.

## After the Meeting

Develop a written plan that includes the items and criteria the team could check “Yes” to, the items and criteria the team couldn’t check “Yes” to, and the next steps the team will take.

TASB Leadership Team Services has facilitation services available to assist with discussion of the Inventory.



# Tally Sheet

Put a check mark next to the items (i.e., 1.1, 1.2) and criteria (i.e., a, b, c) your entire team said “Yes” to during the discussion.

1.1 a.  b.  c.  d.

1.2 a.  b.

1.3 a.  b.

2.1 a.  b.  c.  d.

2.2 a.  b.

2.3 a.  b.

3.1 a.  b.

3.2 a.  b.  c.

3.3 a.  b.

4.1 a.  b.

5.1 a.  b.

5.2 a.

6.1 a.  b.

6.2 a.

7.1 a.  b.  c.  d.

7.2 a.  b.

8.1 a.  b.

8.2 a.  b.  c.

8.3 a.  b.

9.1 a.  b.

9.2 a.  b.

10.1 a.  b.

10.2 a.  b.

Total Completed \_\_\_\_\_

Next Steps:

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