BEAVERTON
SCHOOL DISTRICT

Beaverton School Board Retreat

District Office
1260 NW Waterhouse Avenue
Beaverton, Oregon 97006
Tuesday, January 27, 2026 2:00 PM
Video Stream: www.youtube.com/beavertonschools
Meeting Materials: beavertonsd.org/boardmeetings

AGENDA

Budget Update

School Board Retreat

January 27, 2026

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Numbers

As of January 8, 2026

Resources	2024-2025 Actual	2025-2026 Estimated	2026-2027 Estimated	2027-2028 Estimated	2028-2029 Estimated
Beginning Fund Balance	$ 164,436,027	$ 163,355,697	$ 143,063,715	$ 117,623,593	$ 61,969,425
State Controlled	512,606,804	544,144,054	557,328,499	573,371,918	582,997,616
Locally Controlled	73,043,087	77,317,695	72,063,602	73,718,856	75,422,547
Total	**$ 750,085,918**	**$ 784,817,446**	**$ 772,455,816**	**$ 764,714,367**	**$ 720,389,588**

Expenditures	2024-2025 Actual	2025-2026 Estimated	2026-2027 Estimated	2027-2028 Estimated	2028-2029 Estimated
Salaries	$ 330,419,945	$ 353,255,275	$ 369,175,767	$ 389,874,065	$ 411,975,182
Benefits	196,608,594	221,391,082	219,795,351	243,578,433	244,143,555
All Other	59,701,682	67,107,374	65,861,105	69,292,444	72,990,354
Total	**$ 586,730,221**	**$ 641,753,731**	**$ 654,832,223**	**$ 702,744,942**	**$ 729,109,091**
Surplus/(Deficit)	(1,080,330)	(20,291,982)	(25,440,122)	(55,654,168)	(70,688,928)
Ending Fund Balance	**$ 163,355,697**	**$ 143,063,715**	**$ 117,623,593**	**$ 61,969,425**	**$ (8,719,504)**
Financial Reserve (PERS)	32,913,084	41,265,143	41,765,143	42,265,143	42,765,143
Total Reserves	**$ 196,268,781**	**$ 184,328,858**	**$ 159,388,736**	**$ 104,234,568**	**$ 34,045,639**

Numbers Assumptions

- Based on actuals and projections
- Assumes $11.36B for 2025-2027 (11.4% increase), 10% increase for future biennia
- Uses most recent SSF estimates
- Assumes enrollment declines based on demographer assumptions through 2026-27 with additional 200 student decline, reduced by 600 students in 2027-28 and 2028-29
- Includes negotiated COLA and health caps increases for all years.
- Includes step increases
- Includes revised PERS rates for 2025-2027 biennium and advisory rates for the 2027-2029 biennium
- Includes Apple Lease for teacher laptops in 2025-26
- Does not include further contributions to the district PERS reserve
- Does not include SIA or HSS funds
- Based on best information we have today

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Significant staffing changes due to enrollment decline and student demographic changes

- Budget FTE reductions due to enrollment and student demographic changes in all funds:
  - 54.8 Licensed Staff
  - 9.7 Classified Staff
  - 5.0 Administrative Staff

- Budget FTE additions due to enrollment and student demographic changes:
  - 45.0 Special Education paraeducators

- Some adjustment to the FTE listed above are expected as updated enrollment and direct certification numbers are available

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Other Budget Pressures/Reductions - Local Option Levy

Local Option Levy

Estimated FY27 revenue: $44,500,000
Estimated FY 27 expenditures: $49,583,438
(assumes same FTE as adopted in FY26)

- When approved by voters in 2023, the district estimated approximately 287 classroom teachers would be funded
- Based on collections, we have funded as many as 313 classroom teachers
- The projected shortfall for 2026-2027 will force a reduction of approximately 30 classroom teachers moving us just below the 287 estimate

Estimated Shortfall: **$5,083,438**

This shortfall is reflected on the numbers on slide 2.

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Other Budget Pressures/Reductions - IDEA/SIA

IDEA Grant (SPED)

Estimated FY27 award: $4,840,642
Estimated FY 27 expenditures: $5,547,186

Estimated Shortfall: **$706,544**

SIA Grant (Student Investment Account)

Estimated FY27 award: $38,209,597
Estimated FY 27 expenditures: $39,188,098

Estimated Shortfall: **$469,974**

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Other Budget Pressures/Title Grants

Title I-A, Title I-C, Title II-A, Title III-A, Title IV

- We are watching carefully to determine if further reductions and/or a holdback of funds will be necessary
- Hoping for some sense of direction in February

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SAM Review Team

Classifed Staff

Certified Staff

Administrative Staff

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Goals
For Student Success

1 Safe & Thriving

2 Foundations of Success

3 Progress on Standards

4 College & Career Ready

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Equity Lens

When **making decisions and taking action**, utilize the following questions:

Whose voice is and isn't represented in this decision?

Whom does this decision **benefit or burden**?

Is this decision in alignment with the **BSD Equity Policy**?

Does this decision **close or widen** the access, opportunity, and expectation gaps?

Additional considerations:

What **systemic barriers** might be at play in this situation?

What **other possibilities** were explored?

Is the decision/outcome **sustainable**?

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At the Center of Budget Considerations

Balancing the preservation of services while minimizing impact to the classroom

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2026-2027 Reductions for Consideration

Description	FTE	Amount
District Office Reductions	TBD	TBD
Reduction in Credit Recovery Allocation (presently unused)	0.25	$40,926
Adjustment to teacher allocation increments at middle schools and options - matching the schedule models	1.71	$271,646
Change in practice of 2 classrooms per grade at elementary	12.0	$1,932,162
Adjustment of Elementary Specialist Allocations - proportionate staffing to weighted student population	7.0	$1,141,446
FLEX Online - maintaining the option for students while maximizing resources	TBD	TBD
Adjustment of Instructional Coach Allocations - proportionate to the number of sections in the school	2.0	$355,735

2026-2027 Reductions for Consideration

Description	FTE	Amount
Adjustment of Student Behavioral Specialist Allocations - proportionate staffing to weighted student population	4.0	$694,696
Regional Social Worker Model - Maintaining services in a centralized model with regional clusters	19.5	$2,741,686
Adjustment of Counselor Allocations - proportionate staffing to weighted student population	10.5	$1,618,253
Centralizing District Library Instruction Technology support	8.5	$1,407,649
Restructuring WEX service model	3.0	$451,816
Centralizing of Substance Use Supports	6.5	$915,733
TOTAL	**74.96**	**$11,571,748**

Process Reminder - We are at the beginning. Much more work ahead!

- October - December 2025
  - SAM Committee/Reduction identification
- January 2026
  - Share initial SAM reductions
  - Prepare Budget L&L for feedback
- February 2026
  - Collect feedback about reductions
- March 2026
  - Share feedback at Budget 101
- May 2026
  - Proposed Budget

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Numbers using $10million annual reduction

As of 1/8/26

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Total	**$ 750,085,918**	**$ 784,817,446**	**$ 772,455,816**	**$ 774,714,367**	**$ 751,121,267**

Expenditures	2024-2025 Actual	2025-2026 Estimated	2026-2027 Estimated	2027-2028 Estimated	2028-2029 Estimated
Salaries	$ 330,419,945	$ 353,255,275	$ 369,175,767	$ 389,874,065	$ 411,975,182
Benefits	196,608,594	221,391,082	219,795,351	243,578,433	244,143,555
All Other	59,701,682	67,107,374	65,861,105	69,292,444	72,990,354
Reduction Year 1	-	-	(10,000,000)	(10,731,679)	(11,134,289)
Reduction Year 2	-	-	-	(10,000,000)	(10,375,160)
Reduction Year 3	-	-	-	-	(10,000,000)
Total	**$ 586,730,221**	**$ 641,753,731**	**$ 644,832,223**	**$ 682,013,263**	**$ 697,599,643**
Surplus/(Deficit)	(1,080,330)	(20,291,982)	(15,440,122)	(34,922,489)	(39,179,480)
Ending Fund Balance	**$ 163,355,697**	**$ 143,063,715**	**$ 127,623,593**	**$ 92,701,104**	**$ 53,521,624**
Financial Reserve (PERS)	32,913,084	41,265,143	41,765,143	42,265,143	42,765,143
Total Reserves	**$ 196,268,781**	**$ 184,328,858**	**$ 169,388,736**	**$ 134,966,247**	**$ 96,286,767**

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Budget Worries

- A number of budget reductions scenarios presented by ODE for legislative review during the short session beginning in February

- State School Fund is listed with two (2) 2.5% reductions
  - First 2.5% = $6.2M
  - Second 2.5% = $7.7M

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Questions?

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BOARD GOVERNANCE ESSENTIALS

Kristen Miles, Ed.D.

Director of Board Development, OSBA

OREGON SCHOOL BOARDS ASSOCIATION

Introductions

- Name

- Time on the board

- Where did you go to high school?

- Why are you on the board?

- What superpower do you bring to the board?

Current successes and challenges

Agenda

- Roles and responsibilities: high performing boards, risks of low-performing boards
- Balanced Governance standards and good governance
- Small group Balanced Governance activity
- Practice with scenarios
- Tools for collaboration
- Q&A
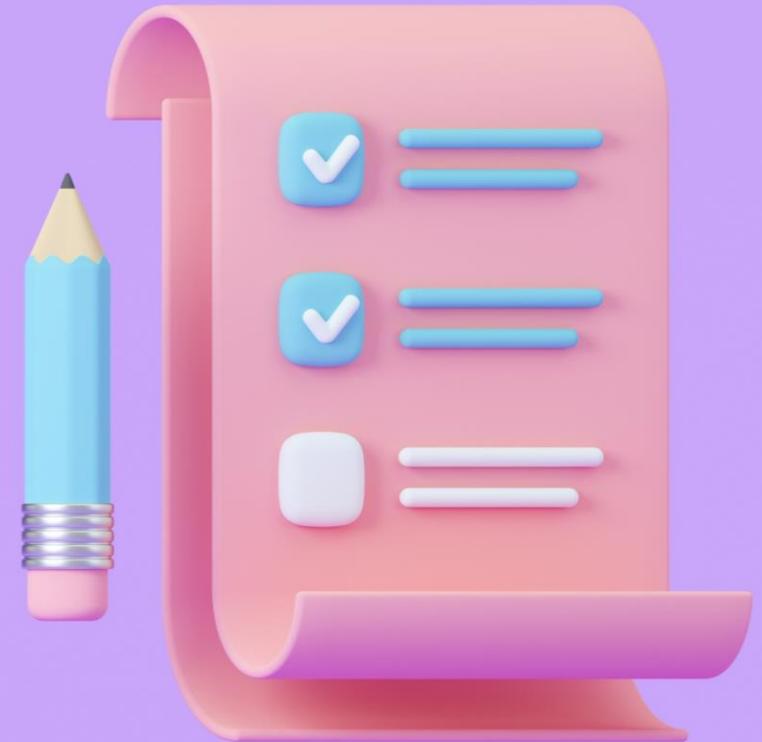
Share out:

- Why does the board matter?

- Why does board culture matter?

- Why does your relationship with your superintendent matter?

The single belief that ALL students can and will learn

School Boards Impact Students
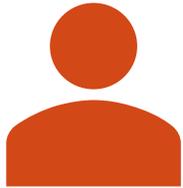
Individual board members

(values, beliefs, motivations – your "why")

Board work

(roles, responsibilities, decision-making, focus)

Board culture

(tone, trust, collaboration, accountability)

Organizational Culture

(district-wide expectations, leadership alignment)

Classroom Instruction

(resources, priorities, support for staff, teachers)

Students

(outcomes, achievement, success)

Causal Chain

Chronology of Applicable Research Informing Effective Boardsmanship

Delagardelle & Heiligenthal (1998-2008)
The Lighthouse Inquires

Alsbury (ed.) (2008)
The Future of School Board Governance: Relevancy and Revelation

1970   1980   1990   2000   2010   2020

Marzano, Waters, & McNulty (2003- present)

Lorentzen & McCaw (2015)
How Board Governance Practices Affect Student Achievement in *Improving School Board Effectiveness*

Alsbury & Gore (eds.) (2015)
Improving School Board Effectiveness

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High-performing boards

	Lighthouse (Rice, et al., 2000 and Delagardelle & Alsbury, 2014)	Essential board leadership practices (Johnson, 2013)	Characteristics of effective school boards (Dervarics & O'Brien, 2016)
Vision & Goals	Set **clear expectations**; set goals	Creating a **vision**	Commit to a **vision of high expectations** for students and set goals toward that vision
Climate & Resources	Create **conditions for success**	Creating climate; providing staff development; creating awareness and **urgency**	**Align and sustain resources** to meet goals
Data & Monitoring	Hold the system **accountable**	**Monitoring progress** and taking corrective action; using data	**Data savvy**, embracing and monitoring data, even when negative
Cohesive Teaming	**Learn together** as a board team	Demonstrating commitment; practicing **unified governance**	Strong **shared beliefs and values** about the system and all students
Community Engagement	**Build public will**	**Engaging the community**, connecting with district leadership	**Collaborative relationship** with staff and community; strong structure to inform/engage stakeholders
Policy & Accountability		Developing **policy with a focus on student learning**	**Accountability driven**, focused on policy and not operations

Practices associated with negative impacts on student outcomes

Lee & Eadens (2014)	Dervarics & O'Brien (2016)
• Meetings less orderly; Lack of respectful engagement, some individuals take up too much airtime • Less time spent on student achievement • Members seek to advance their own agendas • Less effective working relationships • Less reliance on the administrator for advice and input • Less focus on policy items	• Only vaguely aware of school improvement initiatives • Making excuses: external pressures, communication, teachers/staff, families, students as cause for lower performance • Micromanagement • Staff don't know the board • Anecdotes and personal experiences drive decisions instead of data

Governance and Management

Governance	Management
• Policy • Budget adoption • Program adoption • Curriculum adoption • Community engagement • Informed oversight/monitoring	• ARs/policy implementation • Budget spending • Program implementation • Curriculum recommendation • Community engagement • Providing data and information

So how do we get there?

Balanced Governance

Disengaged "Rubberstamp"

Informed Oversight

Over-Reaching "micromanaging"

Alsbury, T. L., & Gore, P. (2015). Improving local school board governance: A Balanced Governance approach. Cambridge, MA: Harvard Press.

Balanced Governance:
Evidence-based standards of performance

(T. Alsbury, Balanced Governance School Board Self-Assessment)

Standard	Description	What it Looks Like
1. Vision-directed planning	Engage staff and community in development of a shared vision focused on student learning	Vision is clear, shared, and student-focused. All decisions connect to long-term goals. Board regularly monitors progress.
2. Community engagement	Recognize that all members of the community are invested partners. Support collaborative relationships.	Board actively listens to diverse voices. Feedback influences decisions. Engagement is ongoing, not one-time.
3. Effective leadership	Establish focus, direction, and expectations that foster student learning. Align authority and responsibility so decisions can be made at the most local level.	Board focuses on student outcomes, respects roles, and holds itself accountable to agreements.
4. Accountability	High expectations for the learning of every student and holds the district accountable for reaching those results. Policy and resources align with the strategic vision and goals.	Goals are measurable and monitored. Data is used to ask questions, adjust direction, and ensure progress.

Balanced Governance:
Evidence-based standards of performance

(T. Alsbury, Balanced Governance School Board Self-Assessment)

Standard	Description	What it Looks Like
5. Using data for continuous improvement	Use meaningful, quality data from multiple sources to set priorities and monitor improvement and progress.	Board uses clear, relevant data to guide decisions and evaluate program impact.
6. Cultural responsiveness	Recognize cultural diversity in many facets: race, gender, geographic, sexual orientation, gender identification, socioeconomic, students with special needs. Reduce and eliminate barriers to access for all students. Apply diverse perspectives to policy and program approvals.	Equity lens is applied to decisions. Board reviews disaggregated data and elevates underrepresented voices.
7. Culture and climate	Create a climate of expectations that all students can learn. Support policies and procedures that foster a positive and safe learning environment. Model professional and respectful relationships.	Board models respect, recognizes success, and ensures a safe, inclusive environment for all.
8. Learning organization	Ensure the district functions as a self-renewing professional community that supports reflection, discovery, improvement, and success at all levels. Encourage professional development and nurture leadership capabilities across the organization.	Board supports staff learning and uses reflection to guide continuous improvement.

Balanced Governance:
Evidence-based standards of performance

(T. Alsbury, Balanced Governance School Board Self-Assessment)

Standard	Description	What it Looks Like
9. Systems thinking	Practice an integrated view of education within and across systems and levels. Seek out collaborative local, state, and national partnerships, coordinated programs, and shared resource models to improve student experience.	Board considers long-term impact and cross-department effects of decisions.
10. Innovation and creativity	Encourage innovation and creativity as assets to development of positive change leading to new types of thinking.	Board supports new ideas with clear goals and reviews impact before expanding.
11. Board member conduct, ethics, and relationship with the superintendent	Have a clear, mutual understanding of the respective roles and responsibilities of the board and superintendent.	Roles are clear. Communication is respectful, timely, and follows agreed protocols.
12. Budgeting and financial accountability	Align the strategic goals of the district to budget priorities and ensure the district is fiscally sound. Allocate resources based on student needs, district policy, and strategic initiatives and priorities.	Budget aligns with board priorities. Spending is tracked, transparent, and student-focused.

Balanced Governance standards activity

Insights

Group 1		Group 2	
Strength		Strength	
Growth Opportunity		Growth Opportunity	
Key Insight		Key Insight	

Can the board impact the superintendent's leadership?

Community engagement

Transformational leadership: Inspirational motivation

Cultural responsiveness

Using data for accountability

Inspirational motivation: alignment to standards

Community engagement	Using data for continuous improvement	Cultural responsiveness
• Advisory committees • Admin/teachers involve families • Strategic decision-making	• Multiple sources of high-quality data • Growth metrics • Show gaps and opportunities	• Celebration of diversity • Students see themselves in curriculum • Equity lens

Supporting the superintendent

- Quarterly check-ins (evaluation process)
- Stay informed about strategic priorities; ask non-operational questions
- Public-facing support for district initiatives (at board meetings, with constituents)
- No surprises! Prepare your superintendent and their team for big questions you know you're going to ask at a board meeting
- Support the superintendent's time and energy – focus on just a few performance goals each year
- Publicly celebrate successes
- A cohesive board provides stability and consistency
- The superintendent should not provide PD to the board

Practice Scenarios

Scenario:

An upset staff member (who is also a parent) approaches you at the grocery store and asks if you can please help them with a complaint about their child's teacher. Their student's teacher has been assessing/grading them punitively and the staff member believes it is retaliation for a tough parent-teacher conference from earlier in the year. They mention they have tried connecting with the teacher and have been unsuccessful, and now they fear retaliation in their own job.

- What do you as a board member do in this situation?
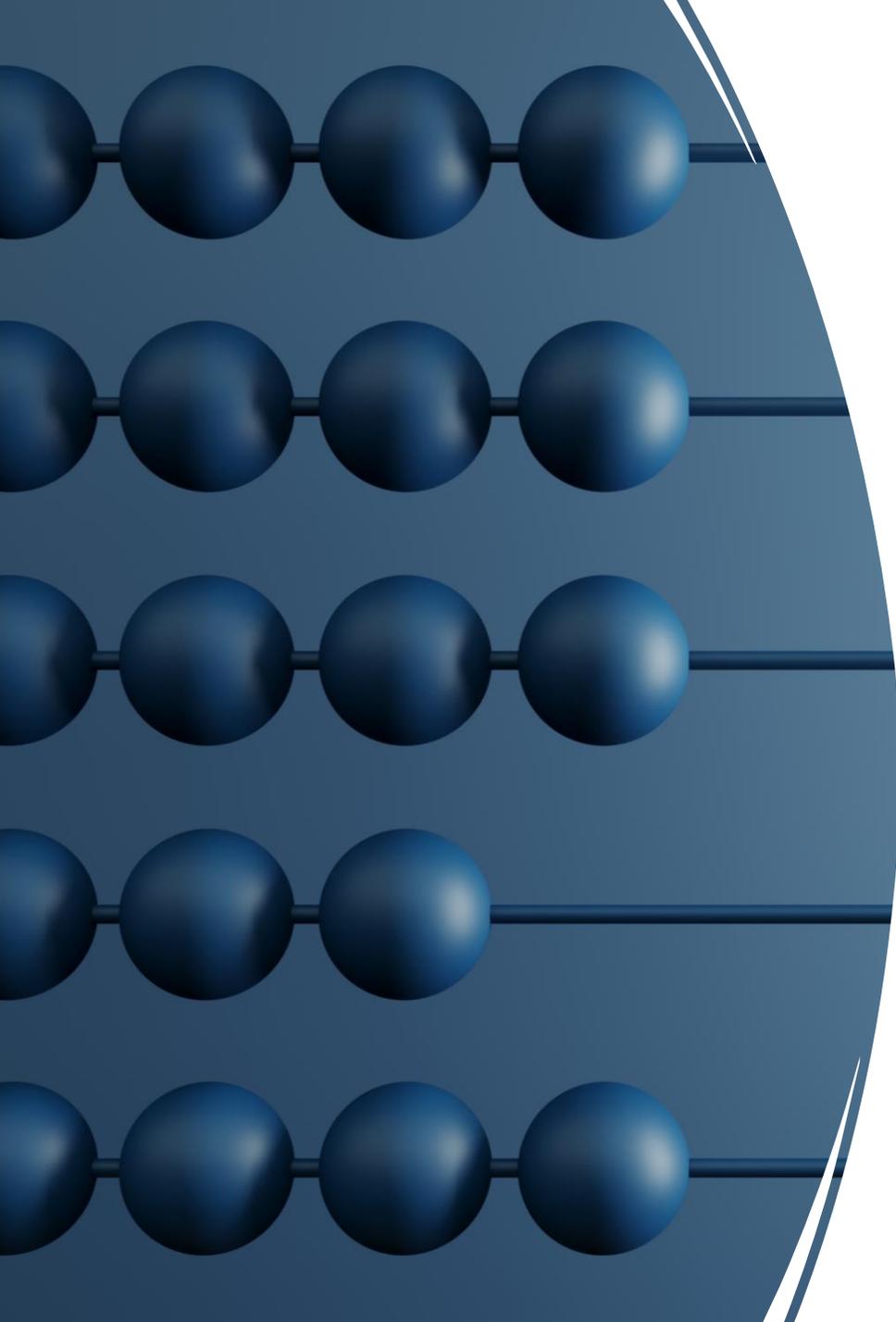
Scenario:

A <u>board member</u> posts a question on Facebook asking for input on a math teacher's behavior. She states that her daughter is upset because of the way the teacher runs the classroom and wants to know if others are having the same concerns. She makes herself available for questions by text, email, and social media. She goes to the superintendent and tells them the concerns, wanting something to change immediately. She also emails other board members for their input. She tells the superintendent that if they do not deal with it, she will bring it up at the next board meeting.

What do board members do when they have a concern?

Scenario:

A board member receives several phone calls from people in the community complaining because the district has non-renewed a well-liked teacher. The board member is familiar with this teacher and believes they have done a good job. The board member indicates to community members that they will personally investigate the situation. While discussing the issue with the superintendent the board member requests to see all the information relevant to the dismissal. The superintendent denies the request and the board member states that they have a right to this information.

What information do board members have access to (in general) and from whom?
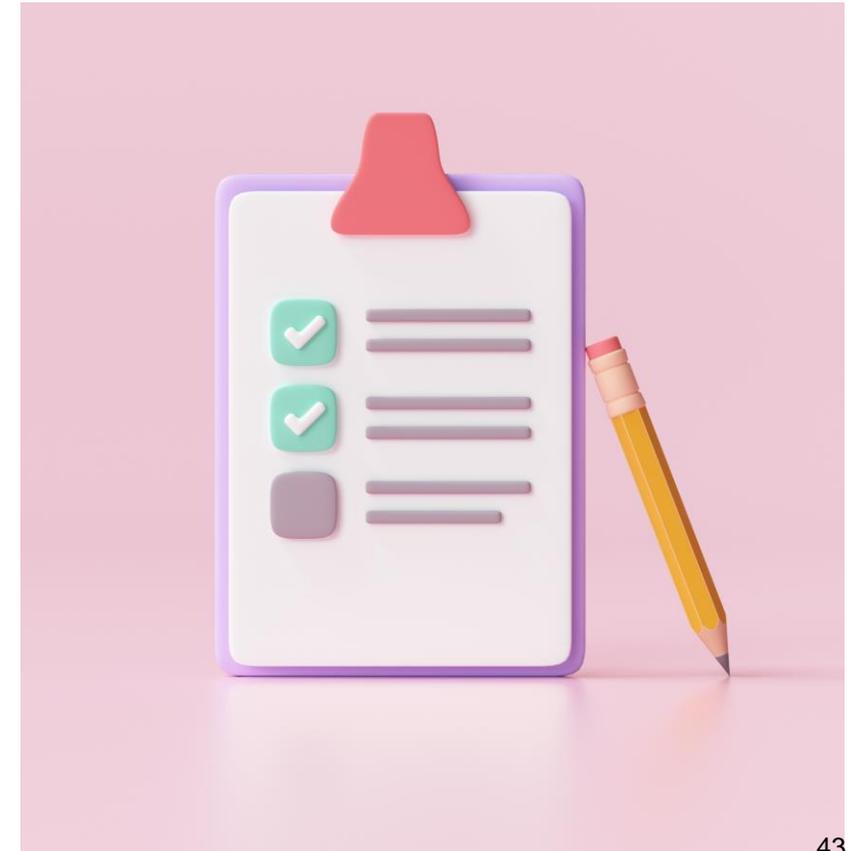
Public meetings law

- Communication outside meetings
- Email, text, social media
- Public records

Whole board and individual board members

Policy BBA: Board Powers and Duties (2017)	Policy BBAA: Individual Board Members' Authority and Responsibilities (2024)
• Establish rules and policy consistent with state and federal rules and laws • Keep itself and the public informed • Act as a "court of appeal" when issues involved the board or policy • Appoint and evaluate a superintendent • Establish academic and financial goals • Oversee the district's financial affairs • Adopt a budget and propose tax levies and bond elections • Authorize the superintendent to approve payments on contracts according to policy and other requirements • Provide for an annual audit • Employ staff and provide for regular evaluations • Direct the collective bargaining process • Establish salaries, salary schedules, and other personnel policies	• Authority and responsibility when in legal session only • Can act in the name of the board when authorized by vote of the board • May make and accept proposals when acting as a designated rep in bargaining • Identify personal opinions as one's own; may endorse candidates as an individual • Be knowledgeable about the district's activities • Request information through superintendent; requests requiring additional expense will be submitted to the board • Request legal advice that incurs expenses through a vote of the board. Requests involving superintendent's employment or performance are made to the chair • Convey complaints to the superintendent • May not direct the superintendent • May visit schools to gain information • May not obligate the district via contract; will be personally liable

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Scenario:

The board is having a discussion at a board meeting. Community members are interrupting the board, accusing some board members that they are not "putting kids first" with their decision. During public comment, people are regularly going over the three-minute allotted time and identifying people by name.

- What are some tools/processes boards can adopt in situations like these?

- Overall, how can the board make the community feel heard without engaging in dialogue at a board meeting AND keep within their governance role?

Scenario

The previous scenario described a situation in which the board meeting was being disrupted, and some community members were criticizing the board's decision as "not putting kids first." Some board members agreed with this comment and stated their intent to vote against the motion in front of them. Others felt the proposal was the right decision. All board members felt that they were, indeed, *putting kids first* but found themselves in conflict about the potential outcome of a decision.

- How can the board address its conflict while finding common ground?

- How can the board ensure decorum and respect during disagreement?

- What are the benefits of disagreement at the board table?

Your scenarios?

Tools for collaboration

- Superintendent evaluation
- Board self-assessment
- Board operating agreement
- Board/superintendent operating agreement
- Communication protocols

Superintendent evaluation process

- Standards
- Goals
- Evidence of performance
  - Quarterly check-ins
  - Self-evaluation
  - Portfolio
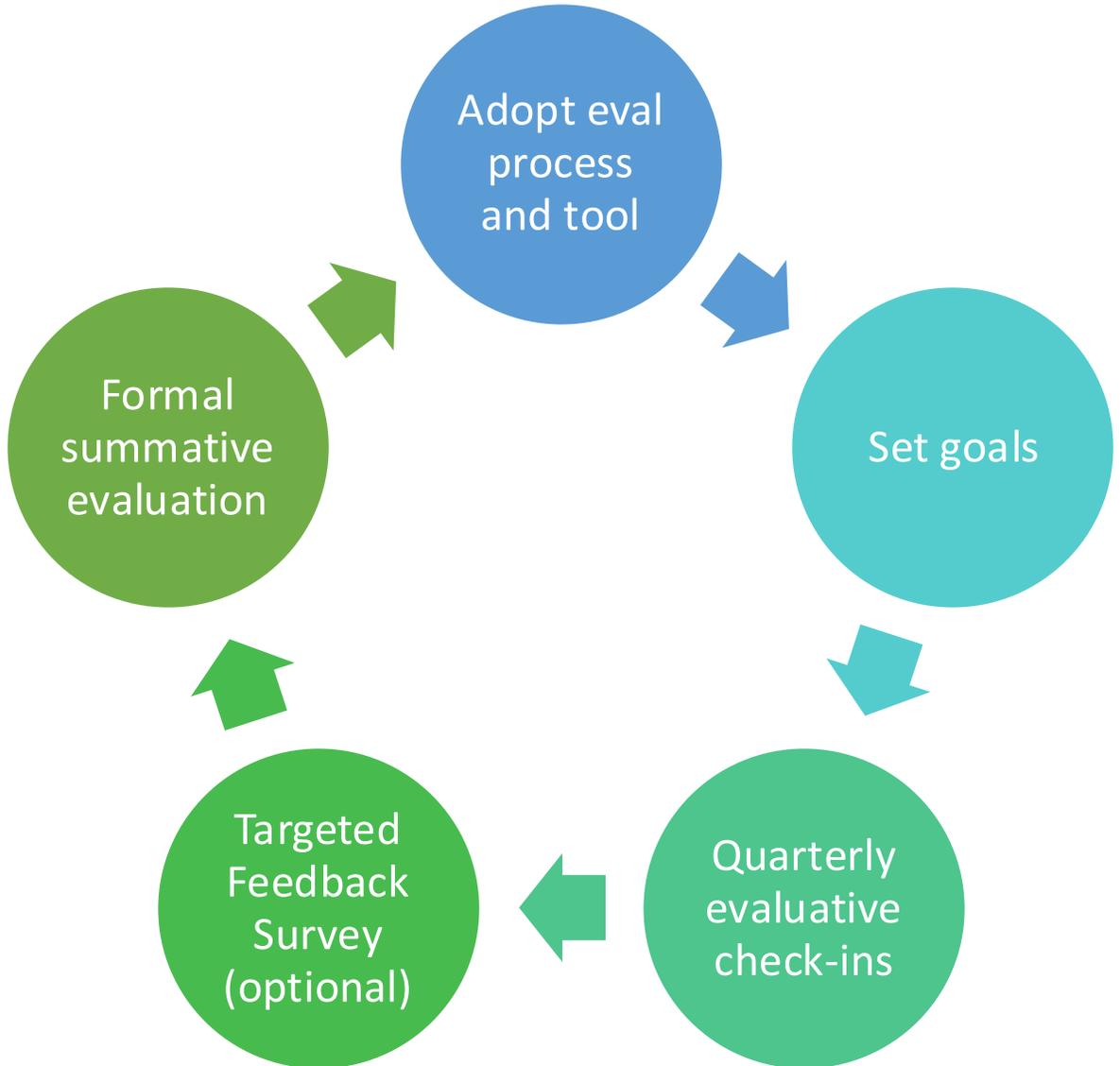- Targeted Feedback Survey (optional)
- Formal evaluation

Standards

- Visionary district leadership
  - Collaborative with the board, inclusion of community, implements strategic priorities and reports back
- Ethics and professional norms
  - Ethical, fair, just, transparent and models this behavior
- Inclusive district culture
  - Develops a supportive, inclusive culture, evaluates and advocates for instruction and supports to underscore this
- Culturally responsive instructional leadership and improvement
  - Evaluates and designs systems of instruction and support that are culturally responsive, ensures that staff are trained

Standards

- Communications and community relations
  - Develops systems and engages with multiple constituencies and partners
- Effective organizational management
  - Strong hiring and retention practices, good systems thinking, productive relationships with unions
- Effective financial management
  - Budget aligns with strategic priorities and is well managed
- Policy, governance, and advocacy
  - Advocates for the needs of the district, good relationship with the board, knowledgeable of laws and regulations impacting the district

Timeline

Adopt eval process and tool

Set goals

Quarterly evaluative check-ins

Targeted Feedback Survey (optional)

Formal summative evaluation

Board self-evaluation

Process and outcomes

- Individual responses based on Balanced Governance standards
- Consultant compiles report and analysis
- Look at:
  - Overall strengths
  - Overall areas of improvement
  - Specific strengths
  - Specific areas of improvement
  - Areas of incongruence
- Goal-setting

Board/superintendent operating agreement

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BOARD – SUPERINTENDENT OPERATING
AGREEMENT SAMPLE

PURPOSE:

The Board of Directors is the educational policymaking body for (organization). To effectively meet the system's challenges the School Board and Superintendent must function together as a leadership team. To ensure unity among team members, effective group agreements must be in place. The following are the group agreements for the Board and Superintendent.

COLLABORATIVE GOVERNANCE:

1. Members of the Board and the Superintendent shall work together as a team; modeling lifelong learning and collaboration.

2. Board members shall recognize and respect the Superintendent's responsibility to manage the school district and to direct employees in district and school matters.

3. Board members shall give careful consideration, listening to all perspectives, to all issues brought to the board by individuals and district leadership.

4. The Board shall make decisions only at properly called meetings. Board members recognize that individual members have no authority to take individual action in policy or district and school administrative matters, unless so authorized by board vote.

COMMUNICATION AGREEMENTS:

1. Board members shall follow the chain-of-command and communicate directly with the Superintendent when a question arises, or a concern or complaint is voiced by a staff member, student, parent or community member.

2. Board Members shall communicate directly with the Superintendent or Board Chair prior to meetings of the board to address questions and/or concerns about agenda items.

3. Board members and the Superintendent shall communicate one-on-one, when an individual concern arises, with any member of the board-superintendent team as appropriate.

BOARD EXPECTATIONS OF THE SUPT:

1. Identify one and place here.
2. Identify one and place here.
3. Identify one and place here.
4. Identify one and place here.
5. Identify one and place here.

SUPERINTENDENT'S EXPECTATIONS OF THE BOARD:

1. Identify one and place here.
2. Identify one and place here.
3. Identify one and place here.
4. Identify one and place here.
5. Identify one and place here.

SIGNATURES OF AGREEMENT:

Date _____

_____   _____

_____   _____

_____   _____

_____   _____

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What are the highest leverage tools your board can use to impact student outcomes?

Tools/Resources

Access Services Exclusive to OSBA Members

PACE- Property and Casualty Coverage for Education

Information about the governance structure of OSBA

LEARN MORE

Board Development Services

Listing of OSBA staff with contact information, biographies, and photos.

LEARN MORE

Legal Services

To promote quality education for all students, focusing on the needs of students of color.

LEARN MORE

Policy Services

A committee, elected by the membership, that develops the OSBA's legislative policies and priorities.

LEARN MORE

Communication Services

Benefits of membership at OSBA.

LEARN MORE

Legislative Services

OSBA's Bylaws, OSBA's Policies, and the Map of Regions is located here.

LEARN MORE

NEWSCLIPS

OSBA compiles education-related news from sources around the state. Because newspapers change their web content regularly, the links below may not work beyond the day we send them.

Trouble with any of the links? Click here to view in your web browser

STATE AND NATIONAL

OREGON PUBLIC BROADCASTING
Superintendent on Oregon coast put on paid leave pending investigation

OREGON CAPITAL CHRONICLE
STATUS CHECK: Where key legislative bills are on week 5

EDUCATION WEEK*
After-School Programs Are Low on Staff, Leaving Students Unsupervised and Underserved

How Schools Can Prevent Costly Cyberattacks (Video)

CENTRAL OREGON

BEND - THE BULLETIN*
New funds focused on bolstering Central Oregon Community College public health programs, regional workforce

EASTERN OREGON

BAKER CITY HERALD*
Baker School Board hires Erin Lair as superintendent

PORTLAND AREA

PORTLAND TRIBUNE*
Gresham-Barlow School Board names superintendent

OREDNEWS

OREGON CAPITAL CHRONICLE
Legislature passes package to help boost the state's teacher workforce amid shortages

Nearly $100 million will be available for retention and recruitment, including bonuses and paying training costs

News site names marked with an asterisk (*) have paywalls and limit article views without a subscription.

EDUCATION WEEK*
Don't Forget the Adults: How Schools and Districts Can Support Educator Mental Health
About a third of districts have added mental health services for staff, according to a national survey

THE 74
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Board Development Team

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Director of Board Development

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What will the board do next?

Questions and discussion

Please fill out our feedback survey!

Balanced Governance Information and Standards

Balanced Governance is defined as any school board governance approach that discourages both board disengagement (sometimes called "rubberstamping") and over-reach (sometimes called "micromanagement"). Balanced Governance describes a constructive role for the school board in monitoring student outcomes through a process called *informed oversight*. A board engaging in Balanced Governance is one that strives to simultaneously set and monitor high end goals for student learning and is also knowledgeable about the means used to reach those ends. Balanced Governance equips boards to better advocate for and support community stakeholders, and craft targeted policy language that oversees formative progress on adopted policy while discouraging governors from directing operations and management.

Highly effective boards are characterized by their use of a Balanced Governance approach as highlighted in substantive research on school board effectiveness (Abjornsen, 2017; Alsbury, 2015; Alsbury & Gore, 2015; Blasko, 2016; Blissett & Alsbury, 2017; Delagardelle & Alsbury, 2015; Holman, 2016; Rocksund, 2017; Saatcioglu & Sargut, 2014; Walser, 2009). Constructs used as benchmarks in an observation and formative evaluation process are based on the collective of research-supported best practices and effective practices of highly effective boards linked to a balanced governance approach and improving student learning.

About the researcher:

Thomas L. Alsbury is founder and president of Balanced Governance Solutions and served for 23 years as a Professor of Educational Leadership at Iowa State, North Carolina State, Seattle Pacific, and Northwest Universities. He served 20 years as a former high school science teacher, principal, and district administrator and for 8 years as Director of the national UCEA Center for Research on the Superintendency and District Governance. He is currently adjunct professor and doctoral advisor/instructor of Organizational Leadership at Northwest University. Dr. Alsbury has been listed as the foremost expert on school governance by the Associated Press and consulted, trained, and evaluated boards on school governance issues in 12 countries and across the United States. He has over 50 publications on School Board and Director research. His book "The future of school board governance: Relevance and revelation" earned Dr. Alsbury the UCEA Culbertson Award. His 2015 book by Harvard Press entitled *Improving local school board governance: A Balanced Governance approach* introduces Dr. Alsbury's Balanced Governance™ model. The Balanced Governance™ model is unique amongst school governance models, in that it is developed from 50 years of research on exemplary school Boards and the findings from the only national studies of school governors; both conducted by Dr. Alsbury. The Balanced Governance™ model has been adopted by both small and large school districts and used as a statewide model in several states.

Balanced Governance Standards

Standard 1: Vision-Directed Planning

The board engages communities and staff in the development of a shared vision focused on student learning. The Board ensures that the vision is the foundation of the mission and strategic goals that direct board policy-making, planning, resource allocation and activities.

- The board collaborates with the community to articulate core values and beliefs for the district
- Board members can clearly articulate the vison and strategic goals of the district
- The board collaborates with the superintendent to develop long-range strategic goals for improving student learning
- The board regularly monitors the progress of strategic goals focused on improving student learning
- The board adopts a budget that aligns resources to the district vision and strategic goals
- The board establishes and models a culture of high expectations for all students
- The board promotes a vision and expectation for excellence beyond the present performance

Standard 2: Community Engagement

The Board recognizes that all members of the community are stakeholders in the success of their schools. The Board engages the community using a reciprocal advocacy process that creates and sustains meaningful conversations, system connections, and feedback loops across the breadth of their community. The Board supports collaborative partnerships and new types and levels of community participation in the school.

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

Standard 3: Effective Leadership

The Board practices and supports leadership that is proactive, integrated, and distributed. The Board establishes focus, direction, and expectations that foster student learning. Across the education system, the board ensures the development and implementation of collaborative leadership models and practices guided by student learning goals. Within district, the board ensures the alignment of authority and responsibility so that decisions can be made at levels closest to implementation.

- Board members are visible in the community

- Board members develop professional community relationships to improve student learning and opportunities for students
- Board activities, analysis, and decision-making are aligned to vision and strategic goals
- The board solicits input from multiple sources to assist in making informed decisions
- The board establishes and sustains relationships with community leaders, city, and county government officials, and state legislators
- Board members model an empowering leadership style
- The board enacts strategic goals and policies to define hiring practices that ensure employees fit into the culture and core values of the district
- Board members promote change through dialogue and collaboration
- Board members understand and are knowledgeable about school improvement initiatives and their role in supporting those initiatives

Standard 4: Accountability

The Board holds high expectations for the learning of each and every student and holds themselves and the organization accountable for reaching those results. The Board provides strategic direction in the development of the organization's mission, vision, and goals. The Board adopts policy and resources that align with strategic vision and goals. The Board monitors and holds accountable the superintendent to implement the strategic vision and goals.

- The board ensures funding to implement accountability measures
- The board regularly reflects on its performance and makes substantive change based on the results of self-evaluation
- The board models a culture of high expectations throughout the district
- The board's priorities and focus are on student learning and student success in alignment with the district's strategic goals
- The board ensures the budget aligns resources based on student learning priorities
- The board supports rewards, consequences, and recognition systems to encourage advancement of the district's strategic goals
- Disaggregated student results and growth are measures against expectations set by district strategic goals
- The board conducts an effective superintendent evaluation focused on monitoring progress on the district's strategic goals
- The board regularly establishes performance goals for itself
- The board ensures the superintendent and staff clearly understand their roles and responsibilities in creating and supporting a culture of high expectations throughout the system

Standard 5: Using Data for Continuous Improvement and Accountability

The Board uses meaningful quality 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 support even better ways to do things the organization is already doing well.

- The board uses, and expects the superintendent to use, a variety of types of relevant data in decision-making

- Programs approved by the board have effective data collection requirements and measurable results
- The board uses data to identify discrepancies between current and desired outcomes
- The identifies and addresses priority needs based on data analysis
- The board communicates to the public how policy decisions are linked to student learning data
- The board creates a culture that encourages the use of data to identify learning needs throughout the system
- The board ensures data used in decision-making is disaggregated, culturally representative, and provides the ability to monitor the district's strategic goals

Standard 6: Cultural Responsiveness

The Board recognizes cultural diversity in its many facets including social, economic, political, religious, geographical, generational, linguistic, ethnic, racial, sexual orientation, gender identification, and students with special needs. The Board develops an understanding of this diversity and applies perspectives responsive to the cultures in their community in policy and program approvals. The Board supports effective community engagement and expectancy strategies to build on the strengths of a community's cultural diversity.

- Board outreach and community engagement activities accommodate cultural differences in values and communication
- The board actively encourages and expects the superintendent to facilitate the participation of culturally diverse groups
- The board has a process to review policies for cultural responsiveness and bias
- Board members approach decision-making considering the many facets of cultural diversity including those indicated in the cultural responsiveness standard
- The board ensures district employees are representative of the values and culture of the community
- A climate of caring, respect, and the valuing of students' cultures is established through board policies and goals
- The board ensures the superintendent holds all employees accountable for high standards and expectations for each and every student

Standard 7: Culture and Climate

The Board creates a climate of expectations that all students can learn at their highest level. The Board supports policy and procedures that foster a positive and safe learning environment. The Board models professional relationships and a culture of mutual respect with staff and community. The Board models and establishes an organizational culture of service.

- The board models relationships built on trust and respect
- The board takes time to reflect and improve internal and external relationships
- The board regularly assesses, holds the district accountable, and provides support for the improvement of the district's culture and climate
- The board creates a system in which high levels of student learning are expected.
- The board establishes policies and ensures practices to foster a safe, positive learning climate for students
- The board models and holds the district responsible for improving a culture of service

Standard 8: Learning Organization

The Board ensures the district functions as a self-renewing professional community that supports reflection, discovery, learning, improvement, and success by staff at all levels. The Board encourages professional development that empowers staff and nurtures leadership capabilities across the organization.

- Board policies nurture leadership capabilities across the organization
- The board creates and pursues opportunities to learn about research-based strategies that ensure continuous improvement for the next generation of learners
- Board members promote positive change through dialogue and collaboration
- The board encourages professional development that increases learning and empowerment
- The board fosters an environment of mutual cooperation, emotional support, and personal growth throughout the organization

Standard 9: Systems Thinking

The Board practices and supports systems thinking in its deliberation and approval of policy, programs, and procedures. The Board practices an integrated view of education within and across systems and levels (e.g. K-12, ESD, community college, and university). The Board seeks out collaborative local, state, and national partnerships, coordinated programs, and shared resource models to improve student learning.

- The board works to avoid policy decisions that shift problems from one part of the system to another
- The board encourages an organizational structure that enables creative processes
- The board engages in process thinking, seeing beyond the immediate situation and easy solutions
- The board analyzes issues for their impact on other parts of the system
- The board team is solution-oriented
- The board works collaboratively with other agencies to encourage dialogue that fosters continual growth

Standard 10: Innovation and Creativity

The Board encourages innovation and creativity as assets to the process of development and change, leading to new types of thinking and better ways of meeting student needs. The Board supports innovation and creativity that support district vision, values, and goals throughout the organization; engages collaborative partnerships; and encourages dialogue, new ideas, and differing perspectives.

- Board members create time and opportunities for their own creative thinking
- Board members partner with community and educational organizations to remove real and perceived barriers to creativity and innovation
- The board sets meeting agendas that allow it to proactively identify and explore strategic issues
- The board incorporates flexibility into its future plans to enable the district to look and move in unforeseen directions in response to unexpected events
- The board recognizes the risk inherent in creativity and innovation and promotes employee knowledge, awareness, creativity, self-initiated action, and experimentation

Standard 11: Board Member Conduct, Ethics, and Relationship with the Superintendent

The Board recognizes that it is essential to have a clear, mutual understanding of the respective roles and responsibilities of the Board and the superintendent. The Board supports and practices team building as an essential part of this relationship.

- Each member of the board understands and respects the distinction between the board's responsibilities and the superintendent's duties
- The board and superintendent trust and respect one another
- Board members represent the interests of the entire district
- Board members preserve the confidentiality of items discussed in executive session
- Board members do not use their office for personal gain or advancement
- Board members do not attempt to individually speak on behalf of the entire board or commit the board
- Board members direct complaints and requests to the superintendent rather than attempting to solve them directly
- The board and superintendent agree on the information needed by the board, and when and how the board receives that information
- The board and superintendent participate in learning opportunities as a team
- Board members come to the meeting familiar with the agenda and prepared to discuss, ask questions, and take action on agenda items

Standard 12: Budgeting and Financial Accountability

The Board ensures that strategic educational goals of schools are translated into reality through effective alignment with the budget and make sure the district is fiscally sound. The Board utilizes fiscal resources based on student needs, district policy, and strategic goals.

- Board members are knowledgeable of the district budgeting process
- Budgeting decisions are based on student needs, adopted district policy and goals, and the district's financial ability to meet those needs
- Board members have a basic understanding of district revenues and expenses
- The board reviews monthly financial statements provided by the superintendent and understands their role in the oversight of the budget