



**Level Up
Your Board
(without it
becoming a
full-time job!)**

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Take a moment...

**ensure you have a
handout & something
to write with!!**

Objectives for Today

- **Leaders will be able to reflect on the current state of their board.**

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- **Leaders will be able to identify priority areas to focus in improving the efficacy of their board.**
- **Leaders will evaluate the best and most appropriate way to take action with their boards so that the board can be maximally impactful.**

For questions throughout...

**please raise your hand,
and don't hesitate to ask!**

Stand Up, Sit Down

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1. I am a board member.

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2. I am a leader who reports directly to the board.

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3. I have been doing this for less than 2 years.

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4. I have been doing this for 3-6 years.

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7. Our school is Elementary.

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7. Our school is an Elementary School.
8. Our school is a Middle School.

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8. Our school is a Middle School.
9. Our school is a High School.

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8. Our school is a Middle School.
9. Our school is a High School.
10. Our school is K-12.

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9. Our school is a High School.
10. Our school is K-12.
11. Our school is part of a network.

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11. Our school is part of a network.
12. Our school is a single site.

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8. Our school is a Middle School.
9. Our school is a High School.
10. Our school is K-12.
11. Our school is part of a network.
12. Our school is a single site.
13. We have enrollment of 250+ students.

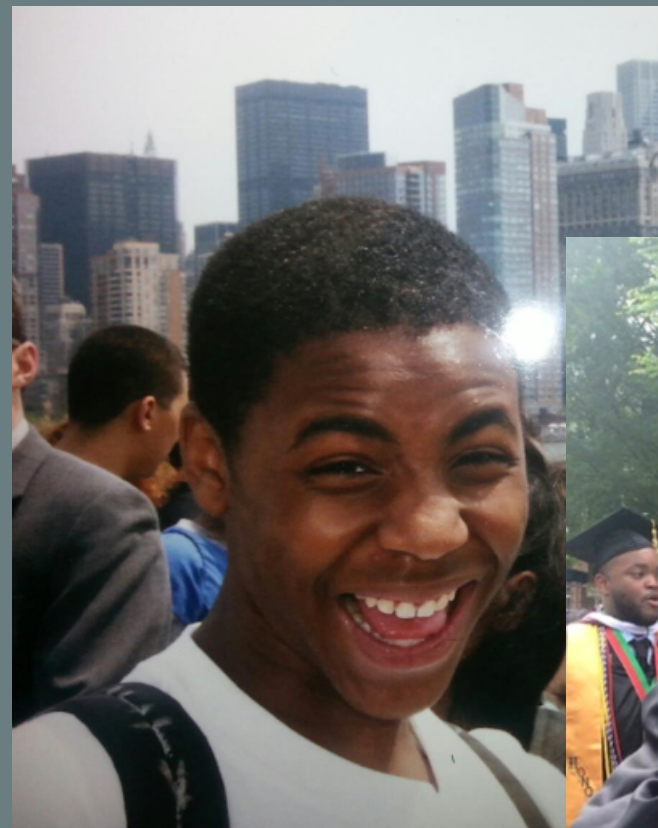
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10. Our school is K-12.
11. Our school is part of a network.
12. Our school is a single site.
13. We have enrollment of 250+ students.
14. We have enrollment of 249 or fewer students.

Who am I?

25+ years in leadership, mostly in education

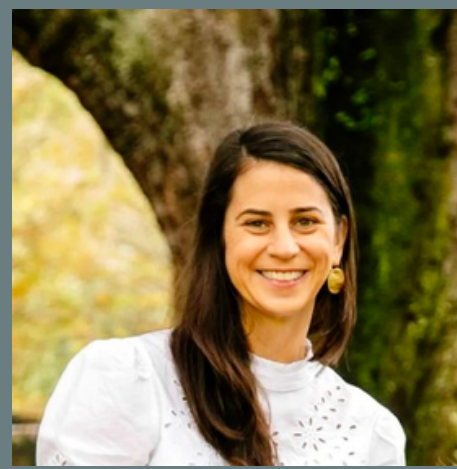
Recruited, partnered with, led and managed my school's Founding Board and (later Boards) for 10+ years



Principal, CEO, Founder, Senior Managing Director, Gallup Certified Strengths Coach

Certified Board Training Specialist & current Executive Board Coach

**BETH NAPLETON
CONSULTING**



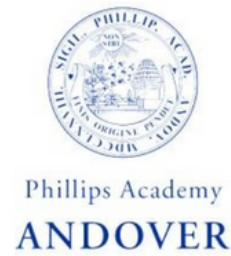
Board Expert

You helped me to do the hard work of addressing concerns that I had with a board member who was underperforming. I don't love conflict and confrontations and you helped me to stop putting it off and address it in a way that was comfortable for me, but also clear to the other person that certain things needed to change.

-a Board President client on what we achieved together

Board Expert





Why are Boards
so complicated?

Brainstorm a list!



Let's review:

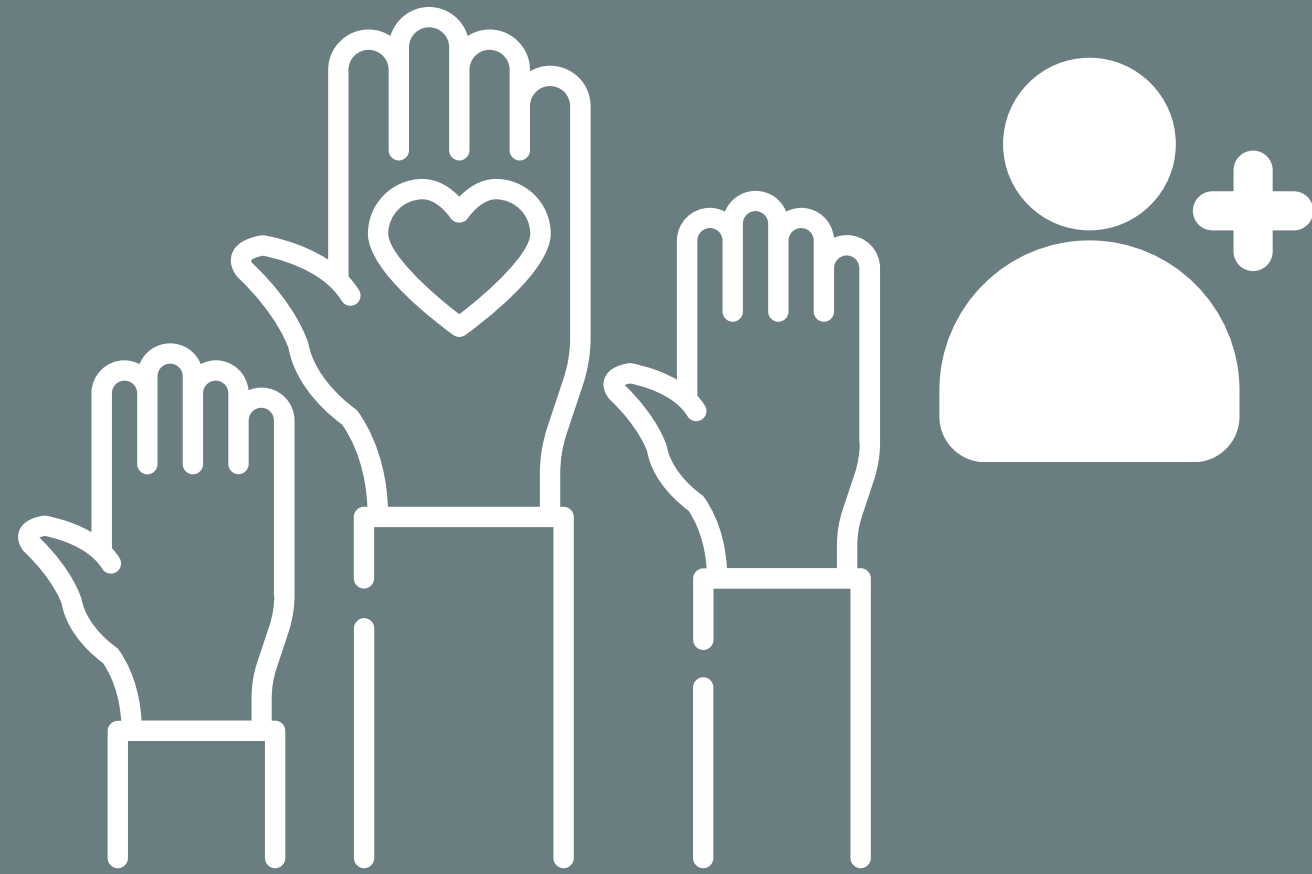
Who has the most?

~~**Cross out**~~ any duplicates.

My list:



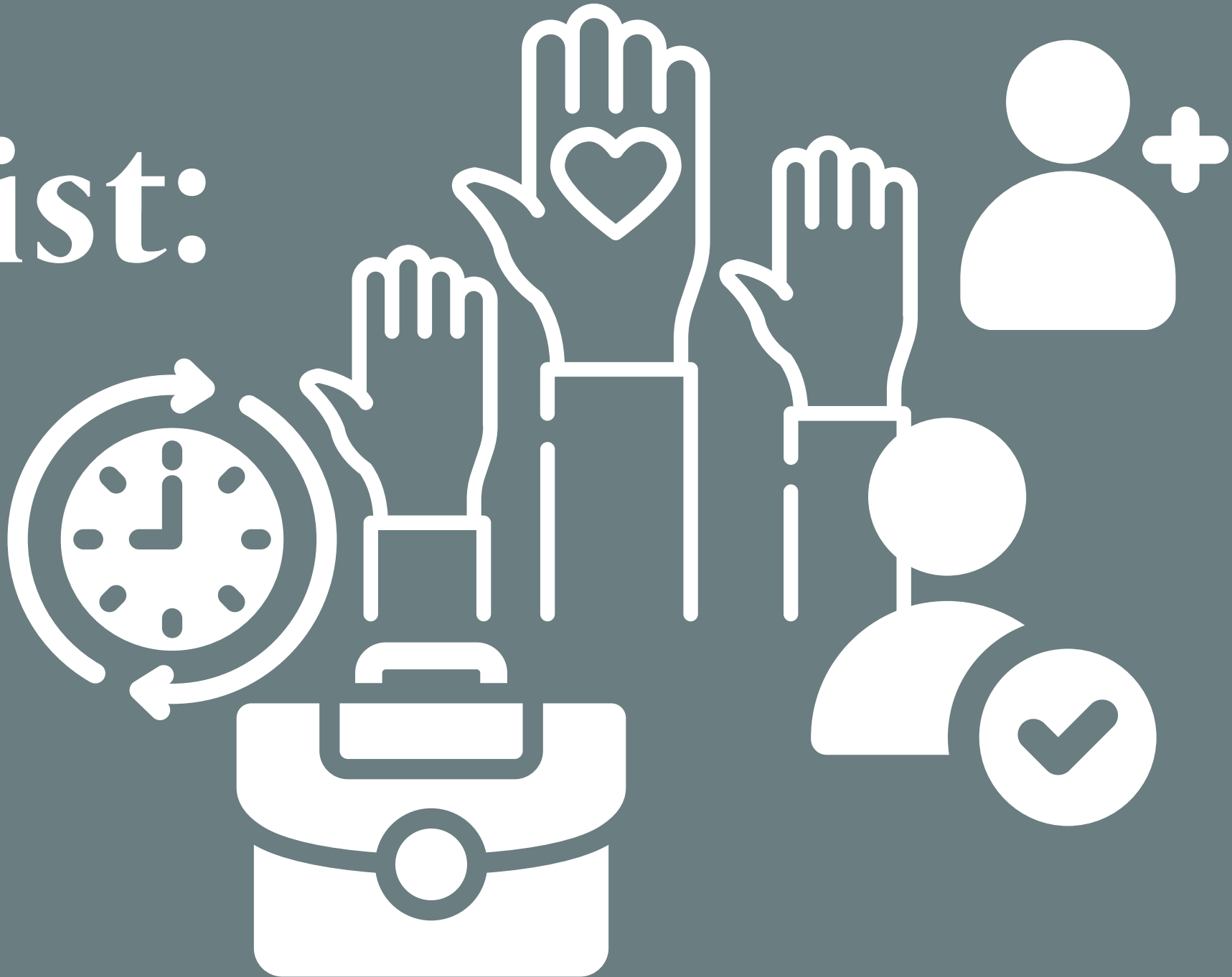
My list:



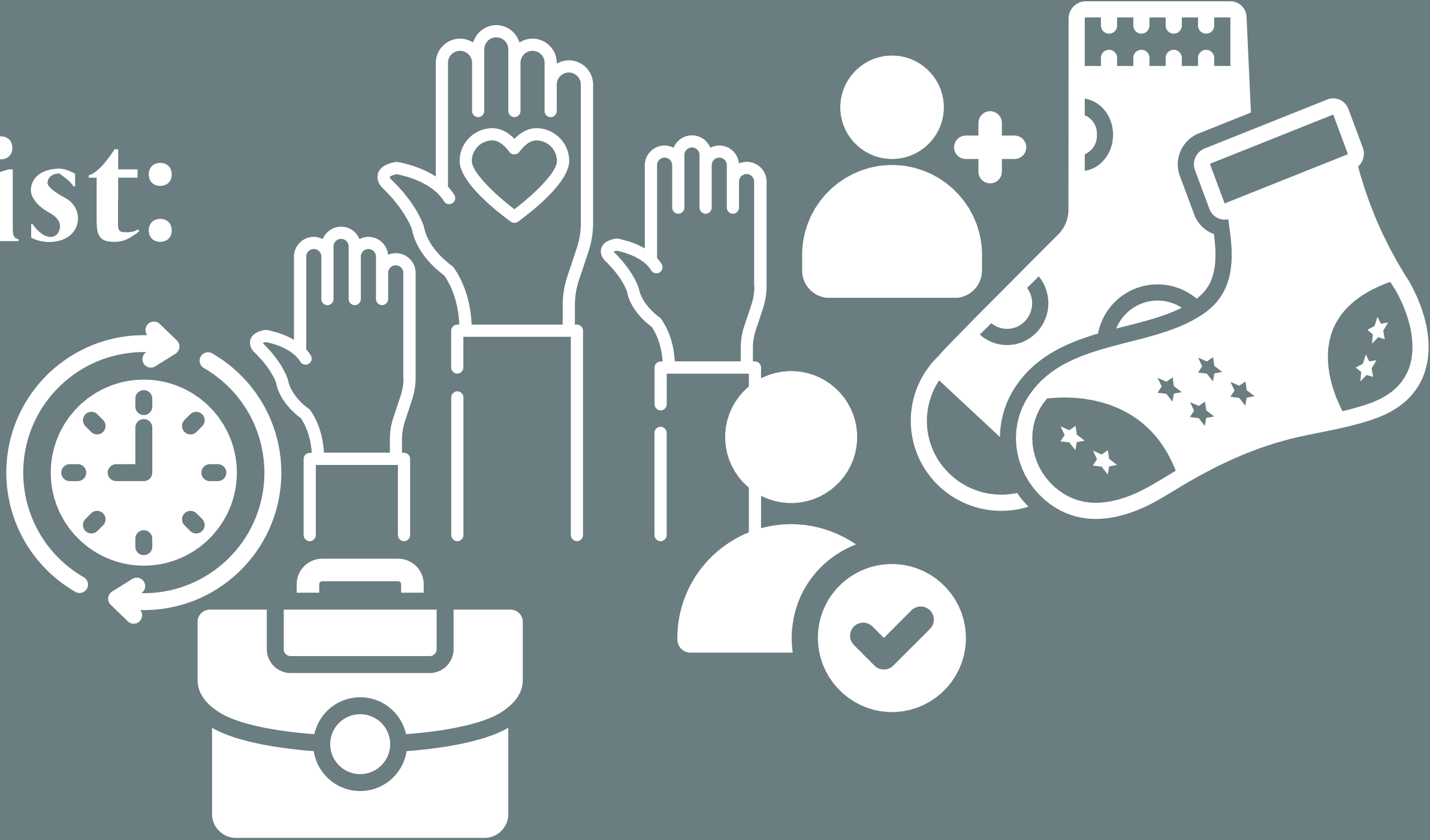
My list:



My list:



My list:



My list:



My list:



My list:



My list:



**WHICH OF THESE
RESONATE MOST WITH
YOU AND WHY?**

So, what do we do?



Where

Who

When

What

Why

How



Our school is _____ years old.

Our school IS / IS NOT done growing (circle one).

Our Board is in the _____ Stage.

a) Founding Board

b) Governing Board

c) Fundraising Board

d) Not Sure/None of These

1=inadequate

2=getting there

3=good enough

4=excellent

Who

1=inadequate

2=getting there

3=good enough

4=excellent

1. Our Board has members with a variety of skill sets they bring to the table.
2. Generally, board members add value to the school.
3. There are enough people to do what is needed for our school: not too few and not too many.
4. We have term limits with staggered terms on our board, and transition board members more or less on that schedule.
5. We have a healthy pipeline of board prospects given our school size.
6. I can't think of anyone on my board who makes me think "they remind me of someone who stayed too long at the party."
7. Board members come prepared to meetings.
8. Generally, board members give of their time.
9. Generally, board members give of their talent.
10. Generally, board members give of their treasure (donate personally at a level that is personally meaningful).

When

1=inadequate

2=getting there

3=good enough

4=excellent

1. Our board has regular meetings on the calendar.
2. We meet quorum at our meetings.
3. There's an agenda for our meetings.
4. Board members receive meaningful prework to prepare for the meeting
5. There's clear follow-up and next steps out of board meetings.
6. We have committees that meet regularly.
7. Committees are where the bulk of our work as a board gets done.
8. Committees have consistent attendance.
9. Committees have consistent participation.
10. Staff participate in committees, as appropriate.

What

1=inadequate

2=getting there

3=good enough

4=excellent

1. Our meetings are generally an effective use of time.
2. Board meetings are generally enjoyable.
3. Generally, board meetings engage in discourse that's meaningful.
4. Generally meetings are held at a strategic altitude.
5. We have clear expectations for our Executive Director or leader.
6. Our Executive Director is aligned with and agrees on those expectations.
7. We monitor the Executive Director's progress towards those goals regularly.
8. Our Executive Director has a regular performance evaluation.
9. The Executive Director's performance evaluation includes feedback and perspective from other staff members.
10. 100% of our board solicits others to give.
11. Expectations for giving are clear (i.e., a give/get, participation in events)
12. Individual board members assist the Executive Director in their area of expertise when called upon.

Where

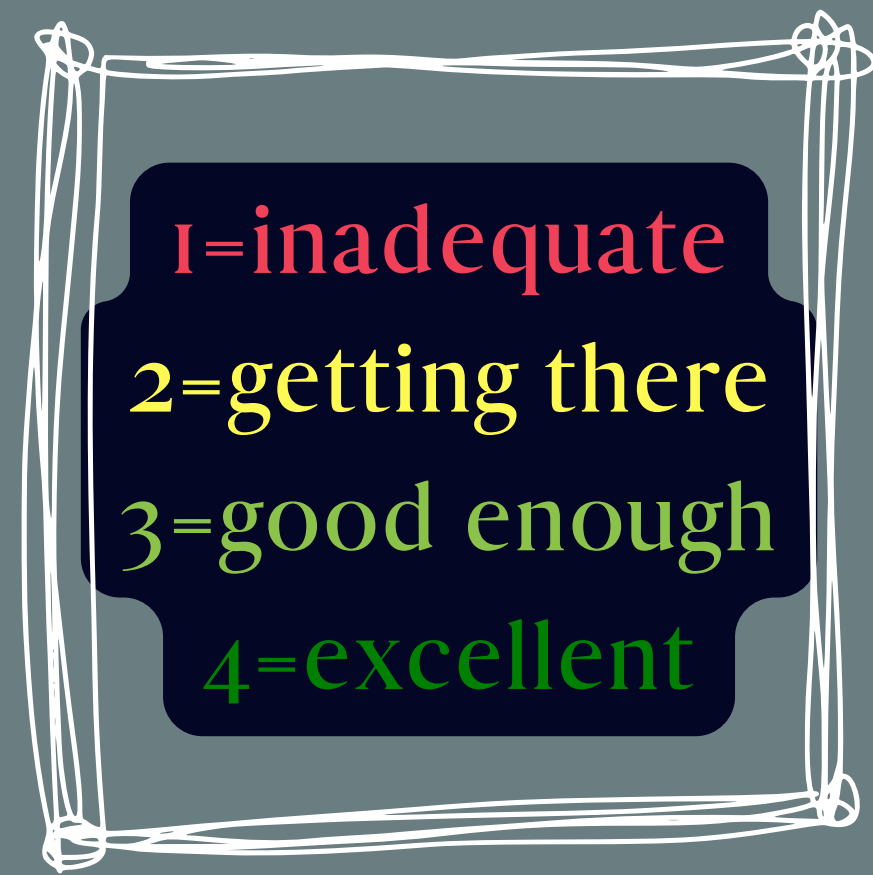
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1. There are regular systems that board members have to communicate outside of meetings. (listserves, Slack channels, etc.)
2. I can generally find the information and data I'm looking for easily enough as a board member.
3. If I need to get in touch with another board member or the Executive Director, I can do so easily enough.



Why

1. Our board generally feels connected to the mission of the school.
2. Board members are generative with what can be done to help the school thrive.
3. Students are regularly a part of our meeting (in person or as a topic of discussion).
4. Teachers and staff are regularly a part of our meeting (in person or as a topic of discussion).

How

1=inadequate

2=getting there

3=good enough

4=excellent

1. People are generally nice to each other on a human level, no matter their views on issues.
2. The board can engage in healthy discussion and conflict. (They are not a rubber stamp, etc.)
3. The board can disagree and commit.
4. Board members are aware and up to date about the performance of the school.
5. The leader is candid and honest about the school's struggles.
6. When a crisis or serious problem occurs that might have been anticipated, the board is generally not surprised.
7. The ego of any individual (or group of individuals) does not supersede the needs of the organization.
8. Individual successes are regularly celebrated.
9. Collective successes are regularly celebrated.
10. Board members publicly recognize the hard work of the school team and leaders.
11. The board is committed to constantly getting better!

A 180-200

B 160-179

C 140-159

D 120-139

Not Yet 119 (or below)

What is working?

What is not working yet?

Course Studies

Scenario:

A board is struggling to meet regularly. People aren't regularly attending meetings, there's a need to cancel because of quorum issues, and building investment and momentum is difficult. The board is unaware of how the school is performing at the level necessary to fulfill their obligations of care, loyalty and obedience as well as their fiduciary responsibilities.

What I'd want to know more about

- Number of board members
- How long they had served
- Where organization was
- What expectations were
- How expectations were communicated and reinforced

HOW I WOULD ADDRESS THIS

&

WHAT HAPPENS IF IT IS NOT ADDRESSED

Scenario:

The board is meeting, preparation is happening—and everything the ED says is it's all sunny all the time. Given the complex nature of schools, that seems unlikely. Yet in meetings or with probing, Board members are not getting traction with the ED. It can feel frustrating –board members struggle with wanting to know the real story and thinking, “Hey, maybe things ARE that good.” Some board members have made comments like “Well, if things are so great—why are we here?”

What I'd want to know more about

- Executive Director: history, performance
- Is this an issue with not knowing or wanting to be there?
- What is the history of Executive Director performance evaluations?
- How is trust generally? What is the attitude towards mistakes or missteps?

HOW I WOULD ADDRESS THIS

&

WHAT HAPPENS IF IT IS NOT ADDRESSED

Prioritized steps with

people

Prioritized steps with

The week

Q

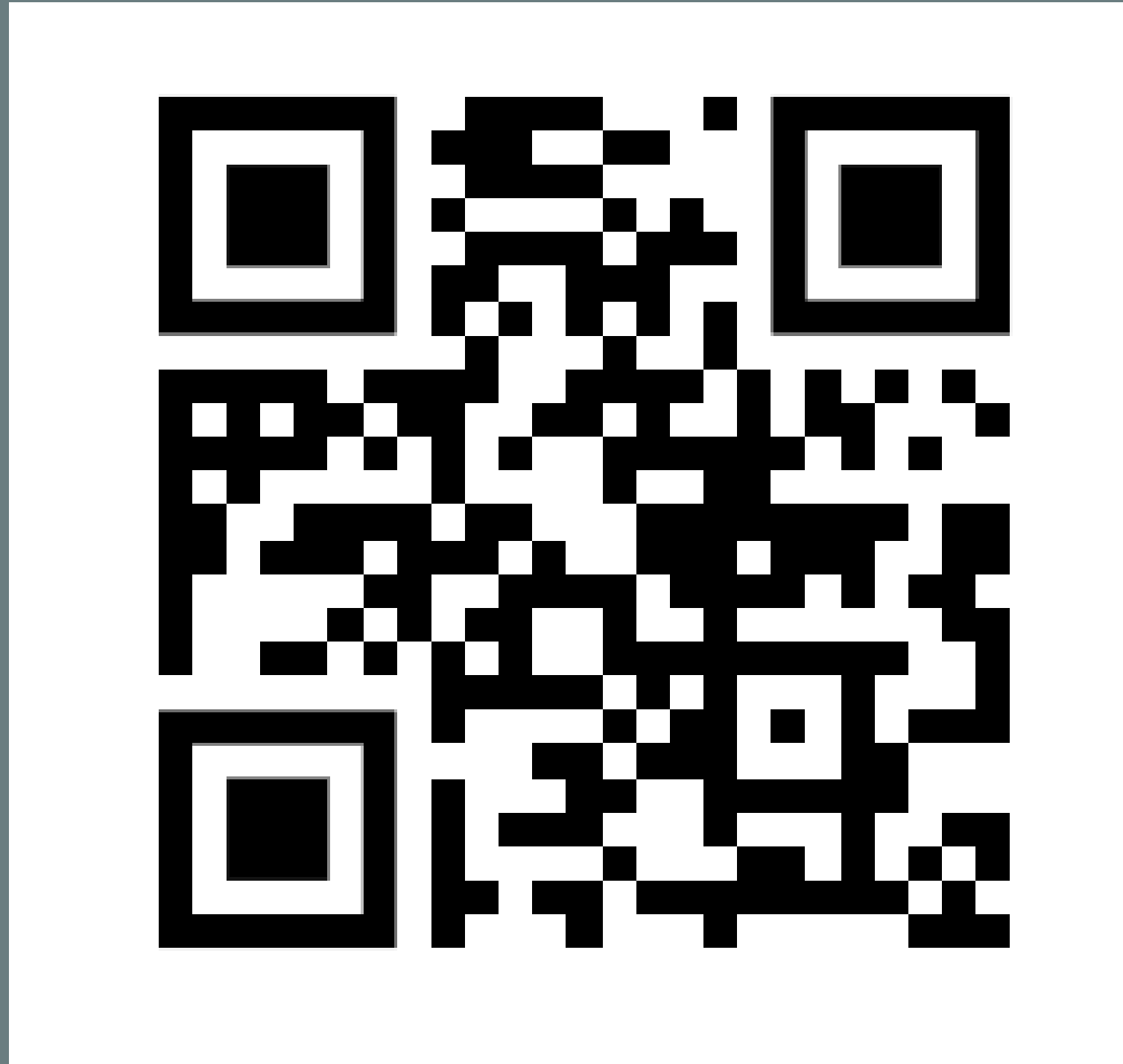
R

K

**Downloadable
additional resource
for you to take & use**

NEXT 

SCAN
ME

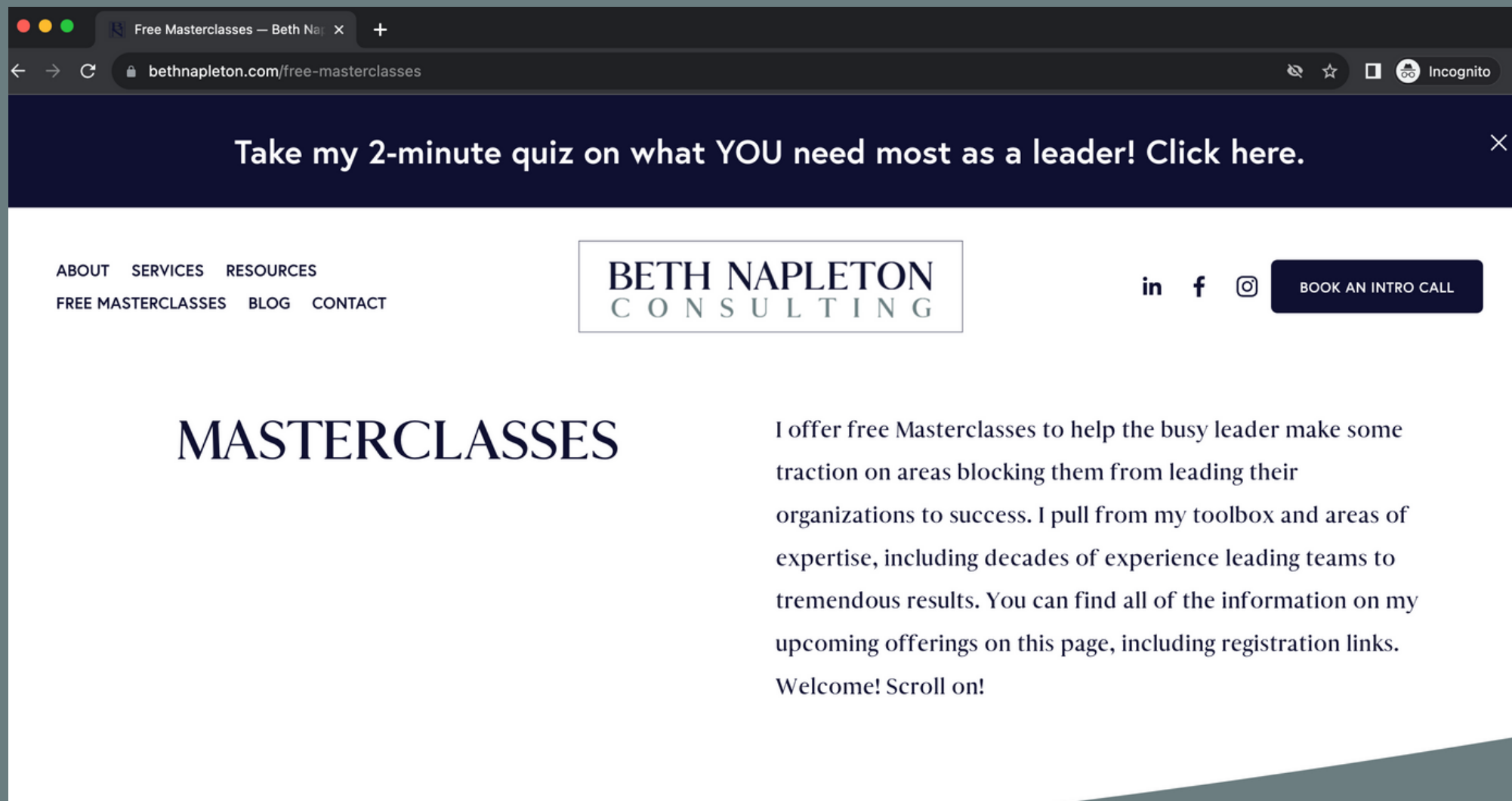


Or go
here



<https://tinyurl.com/2023ORC3S>

on my website...



bethnapleton.com

- **Registration links for my masterclasses**
- **Resources galore**
- **More info about me**

Masterclasses



Level Up: How to Go from Surviving to Thriving

Tues., Dec. 5 @ 3PM EST / 2PM CST / 1PM MDT / 12PM PDT

REGISTER



Level Up your Org Culture: How to Lead an Effective Reset

Wed., Dec. 13 @ 2PM EST / 1PM CST / 12PM MDT / 11AM PDT

REGISTER



**Join me for live learning,
or register to get the replay!**



and..

New LevelED Up Leadership

Website Coming Soon!



Beth Napleton

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