

BOARD HEALTH SELF-ASSESSMENT TOOLKIT

Board / School Name: _____ Date: _____

HOW TO USE THIS TOOLKIT

Charter school boards don't all face the same challenges at the same time. A board in its first year of operation is wrestling with different questions than a board navigating a renewal decision or a board that has settled into a steady, high-functioning rhythm. This toolkit is built around that reality. Instead of measuring every board against one static rubric, it asks the board to first locate itself within a developmental stage, then evaluate its health against the priorities that actually matter at that stage.

Work through each of the six domains below. For each one, read the four stage descriptions and check the box next to the one that best reflects where the board currently sits. Don't aim for the description that sounds best. Aim for the one that's true.

Once all six are marked, turn to the Your Results section to tally your answers and see what the pattern suggests.

THE FOUR STAGES

Stage	What It Looks Like
Founding	The board exists on paper more than in practice. Roles are still being defined, and most energy is going toward getting the school open.
New School	(Years 1–3) The school is open and running, but the board is still learning what governance looks like in practice, separate from the daily work of running a school.
Vulnerable	The board is facing real headwinds: academic performance, finances, enrollment, staff turnover, or a combination. Governance is under pressure and the stakes are visible.
Thriving	The board has a track record, a working rhythm, and enough stability to think generatively rather than reactively.

THE SIX GOVERNANCE DOMAINS

1. Mission & Strategic Direction
2. Board Composition & Culture
3. Academic Oversight
4. Financial Oversight
5. Executive Leadership & Accountability
6. Community & Political Sustainability



MISSION & STRATEGIC DIRECTION

Mark	Stage	Description
☐	Founding	Mission is written but untested. The board hasn't yet had to make a hard decision that puts the mission to the test.
☐	New School	The board references the mission in conversation but hasn't built a habit of using it to guide real decision making tradeoffs.
☐	Vulnerable	Mission risks becoming background noise, something everyone assumes rather than actively holds onto, especially when survival questions dominate meetings.
☐	Thriving	The board revisits mission deliberately, uses it to evaluate major decisions, and can articulate what the school would never do, not just what it would.

BOARD COMPOSITION & CULTURE

Mark	Stage	Description
☐	Founding	Members were recruited quickly, often from personal networks, without a clear skills map.
☐	New School	The board is starting to notice gaps (financial expertise, legal background, community ties) but hasn't yet built a deliberate recruitment process.
☐	Vulnerable	Turnover is high, meetings feel tense or conflict-avoidant, and trust between members is uneven.
☐	Thriving	The board has a living skills matrix, a real onboarding process, and a culture where disagreement is normal and productive.

ACADEMIC OVERSIGHT

Mark	Stage	Description
☐	Founding	The board has not yet seen real academic data because there isn't any yet.
☐	New School	The board receives academic reports but mostly listens rather than questions.
☐	Vulnerable	Academic performance is a source of real concern, and the board may be reacting to a specific crisis (a low renewal score, a state designation) rather than tracking trends proactively.
☐	Thriving	The board asks informed questions about instructional strategy, understands leading indicators, and holds the ED accountable to academic goals without micromanaging instruction.

FINANCIAL OVERSIGHT

Mark	Stage	Description
☐	Founding	Budgets exist mostly on paper, tied to the initial charter application, and have not yet been tested against real enrollment or actual costs.
☐	New School	The board reviews financials but often defers heavily to staff interpretation rather than independently understanding the numbers.
☐	Vulnerable	Financial pressure is active and visible: cash flow concerns, enrollment shortfalls, or unexpected costs are driving the agenda.
☐	Thriving	The board understands the financial model well enough to ask forward-looking questions, not just review historical statements.

EXECUTIVE LEADERSHIP & ACCOUNTABILITY

Mark	Stage	Description
☐	Founding	There may not yet be a permanent school leader, or the relationship between board and founding leader is still being defined.
☐	New School	The board is learning to separate governance from management, often with some early stumbles into one or the other.
☐	Vulnerable	The board-ED relationship may itself be a source of strain, whether from lack of trust, unclear expectations, or a leadership transition.
☐	Thriving	The board conducts a real annual evaluation, gives honest feedback, and has a clear (if rarely used) plan for leadership transition.

COMMUNITY & POLITICAL SUSTAINABILITY

Mark	Stage	Description
☐	Founding	Community relationships are largely aspirational, described in the application but not yet built.
☐	New School	The board is starting to understand who its real stakeholders are (families, authorizer, district, local officials) but hasn't built consistent touchpoints.
☐	Vulnerable	External relationships may be strained or under scrutiny, particularly with the authorizer.
☐	Thriving	The board has durable relationships with its authorizer and community, and treats those relationships as an asset it actively maintains rather than something that only matters at renewal time.

YOUR RESULTS

Transfer the stage you checked for each domain to the table below.

Domain	Stage Marked
1. Mission & Strategic Direction	
2. Board Composition & Culture	
3. Academic Oversight	
4. Financial Oversight	
5. Executive Leadership & Accountability	
6. Community & Political Sustainability	

Tally how many domains landed in each stage:

Founding ___ / 6	New School ___ / 6	Vulnerable ___ / 6	Thriving ___ / 6
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READING THE PATTERN

A board rarely lands in one stage across every domain, and that's normal. What matters is the pattern, not a single number.

If four or more domains land in the same stage, treat that as the board's overall stage and prioritize accordingly: shore up basic infrastructure at Founding, build consistent habits at New School, stabilize the highest-pressure areas at Vulnerable, or sustain and mentor at Thriving.

If the results are spread across three or four stages with no clear majority, treat that as the finding itself.

Uneven governance development is common, and it usually means the board has built strength in the areas that got attention and left the rest to develop on their own. Start with whichever domain landed in the earliest stage, since gaps there tend to constrain progress everywhere else.

Any domain marked vulnerable deserves attention on its own, regardless of how the rest of the board scores. A single vulnerable domain, especially Financial Oversight or Executive Leadership & Accountability, can create risk that the other domains can't offset.

This toolkit is a starting point for a conversation, not a final verdict. Use it to decide where the board's next real conversation should happen.