

The Regular Meeting of the Board of Trustees will begin immediately following the conclusion of the Board of Trustees Workshop but not prior to the posted start time.



WESTLAKE ACADEMY

Mission / Vision Statement

Westlake Academy is a nurturing, community owned International Baccalaureate Charter School whose mission is to achieve academic excellence and to develop life-long learners who become well-balanced, responsible global citizens.

BOARD OF TRUSTEES MEETING

AGENDA

November 1, 2010

**WESTLAKE TOWN HALL
3 VILLAGE CIRCLE – 2ND FLOOR
COUNCIL CHAMBERS/MUNICIPAL COURT ROOM**

**Workshop Session 4:30 p.m.
Regular Session 6:00 p.m.**

Workshop Session

- 1. CALL TO ORDER**
- 2. REVIEW OF CONSENT AGENDA ITEMS FROM NOVEMBER 1, 2010, TRUSTEES REGULAR MEETING AGENDA.**

Strategic Plan-Desired Outcome: High Student Achievement

Develop inquiring, knowledgeable, caring and disciplined young people who use their unique talents to create a better and more peaceful world through intercultural understanding and respect

3. **PRESENTATION AND DISCUSSION OF THE STAFF TO STUDENT RATIO TO DETERMINE REASONABLE LEVELS OF THE NUMBER OF STUDENTS PER CLASS THROUGH THE PRESENTATION AND DISCUSSION OF RELEVANT AND IMPORTANT RESEARCH.**
4. **PRESENTATION AND DISCUSSION OF INTERNATIONAL SCHOOLS' ASSESSMENT (ISA).**

Strategic Plan-Desired Outcome: Financial Stewardship & Sustainability

To ensure sufficient, well-managed resources to support and advance the mission of Westlake Academy

5. **DISCUSSION OF BOARD OF TRUSTEE GOVERNANCE AS ILLUSTRATED IN DR. BRIAN CARPENTER'S *CHARTER SCHOOL BOARD UNIVERSITY: AN INTRODUCTION TO EFFECTIVE CHARTER SCHOOL GOVERNANCE*; CHAPTERS 8-9.**
6. **BOARD RECAP / STAFF DIRECTION**
7. **ADJOURNMENT**

Regular Session

1. **CALL TO ORDER**
2. **PLEDGE OF ALLEGIANCE**
3. **CITIZENS' PRESENTATIONS AND RECOGNITIONS:** This is an opportunity for citizens to address the Board on any matter whether or not it is posted on the agenda. The Board cannot by law take action nor have any discussion or deliberations on any presentation made to the Board at this time concerning an item not listed on the agenda. Any item presented may be noticed on a future agenda for deliberation or action.
4. **CONSENT AGENDA:** All items listed below are considered routine by the Board of Trustees and will be enacted with one motion. There will be no separate discussion of items unless a Board member or citizen so requests, in which event the item will be removed from the general order of business and considered in its normal sequence.
 - a. Consider approval of **Resolution 10-21**, Amendment to the Student Athletic/Extra Curricular Program Academic Eligibility policy.

5. BOARD RECAP / STAFF DIRECTION

6. BOARD CALENDAR

- Secondary Boundary Parents Meetings (2 remaining)
 - November 2, 2010; 7 pm; Home of Richard & Kimberly DePaolo
 - November 10, 2010; 7 pm; Home of Jim & Christine Smith
- Westlake Academy Thanksgiving Holiday
November 22-26, 2010
- Town Offices Closed
November 25-26, 2010
- Texas Charter Schools Association Conference, San Antonio
November 29-December 1, 2010 (contact Ben)
- Community Tree Lighting
November 30, 2010; 6:30 pm; Westlake Academy campus
- Board of Trustees Meeting
December 13, 2010
- Annual Westlake Employee Award and Christmas Dinner
December 15, 2010; 6:30 pm; Marriott Solana
- Westlake Academy Winter Holiday
December 20 – 31, 2010
- Town Offices Closed
December 24th, 27th and 31st, 2010

7. FUTURE AGENDA ITEMS: Any Board member may request at a workshop and / or Board meeting, under "Future Agenda Item Requests", an agenda item for a future Board meeting. The Board member making the request will contact the CEO with the requested item and the CEO will list it on the agenda. At the meeting, the requesting Board member will explain the item, the need for Board discussion of the item, the item's relationship to the Board's strategic priorities, and the amount of estimated staff time necessary to prepare for Board discussion. If the requesting Board member receives a second, the CEO will place the item on the Board agenda calendar allowing for adequate time for staff preparation on the agenda item.

- None

8. ADJOURNMENT

ANY ITEM ON THIS POSTED AGENDA COULD BE DISCUSSED IN EXECUTIVE SESSION AS LONG AS IT IS WITHIN ONE OF THE PERMITTED CATEGORIES UNDER SECTIONS 551.071 THROUGH 551.076 AND SECTION 551.087 OF THE TEXAS GOVERNMENT CODE.

CERTIFICATION

I certify that the above notice was posted at the Town Hall of the Town of Westlake, 3 Village Circle, on October 27, 2010, by 5:00 p.m. under the Open Meetings Act, Chapter 551 of the Texas Government Code.

Kelly Edwards, Town Secretary, TRMC

If you plan to attend this public meeting and have a disability that requires special needs, please advise the Town Secretary 48 hours in advance at 817-490-5710 and reasonable accommodations will be made to assist you.

Westlake Academy

Item # 2 – Review of Consent Agenda Items

CONSENT AGENDA: All items listed below are considered routine by the Board of Trustees and will be enacted with one motion. There will be no separate discussion of items unless a Board member or citizen so requests, in which event the item will be removed from the general order of business and considered in its normal sequence.

- a. Consider approval of **Resolution 10-21**, Amendment to the Student Athletic/Extra Curricular Program Academic Eligibility policy.

Westlake Academy

Memo

To: Honorable President and Members of the Board of Trustees

From: Jamie Schmitz, Primary Principal/Campus Coordinator
Rod Harding, MYP Principal

Subject: Board Workshop of November 1st, 2010

Date: October 26th, 2010

ITEM

- Wkshp Discussion of Strategic Plan Desired Outcome: High Student Achievement; specifically, the review of the staff to student ratio to determine reasonable levels of the number of students per class through the presentation and discussion of relevant and important research

WESTLAKE ACADEMY MISSION/ VISION STATEMENT

Westlake Academy is a nurturing, community owned International Baccalaureate Charter School whose mission is to achieve academic excellence and to develop life-long learners who become responsible, global citizens.

WESTLAKE ACADEMY VALUES

- Academic Achievement
- PYP, MYP, DP (IB Continuum)
- Caring Environment
- Fiscal Stewardship
- Communication/Transparency
- Engaged Stakeholders
- Maximizing Each Child's Potential

BACKGROUND (including policy implications and options):

“High Student Achievement” is one of the five Desired Outcomes contained in the Academy’s Strategic Plan. Specific Outcome 10.0 under this Desired Outcome relates specifically to this agenda item. The portion of the Strategic Plan related to this topic is attached to this agenda memo for the Board’s review, information, and to provide context for the Board’s discussion at this workshop.

Also related to this Desired Outcome is a summary of the most relevant and scientifically credible research, which will be reviewed with the Board at the workshop. Items covered will include:

- Meta-analysis findings
- Research methodology
- Significant studies
- Teacher quality

- Variables under teacher control
- Theories and fallacies

FUNDING

N/A

RECOMMENDATION

Hear presentation regarding class size and high student achievement and discuss this item within the context of the Board's Strategic Plan for WA.

ATTACHMENTS:

1. Class size and teacher quality article-Jennifer Buckingham
2. Class size and teacher quality article synopsis

Buckingham Article Overview

Reducing class size is one of the most widely known and intuitively appealing school reforms. It is also one of the most hotly debated.

Jennifer Buckingham of the Australia/New Zealand-based Centre for Independent Studies reviewed the research on class size and student achievement, summarizing her results in "Reflections on Class Size and Teacher Quality" (March 2003). She found that the large majority of studies showed no significant relationship between class size and student achievement, and the remainder showed only a small increment of improvement. In a given classroom, teacher quality has a far greater influence on achievement than the quantity of students.

Among the several large and small studies that did find achievement associated with smaller class size, Buckingham identified a number of methodological issues that raise questions about the results. Many of these studies were poorly designed. For example, reforms such as curriculum changes were introduced at the same time as class size reduction, making the effect of class size alone impossible to determine. Moreover, in most cases, the persons participating in the experiment were cognizant that they were under scrutiny and motivated to produce positive results-the so-called "Hawthorne Effect." In addition, teacher and student assignments were not fully randomized, many of the studies were simply too brief or too small, and few were independently evaluated.

Studies Examined

Among the most important studies examined by Buckingham is Tennessee's Project STAR (Student Teacher Achievement Ratio). It is frequently cited as proof that smaller classes are beneficial. However, even STAR's principal researchers attached several caveats to their findings; among them, the above-noted "Hawthorne Effect." In other words, the teachers and students knew they were part of an experiment. In addition, the schools that agreed to participate apparently tended to be the ones with an unusually high interest and enthusiasm for such reforms, perhaps inflating the results.

Buckingham also points to certain unanticipated negative effects created by the class size reduction mandates that followed Project Star. In California, for example, attempts to mandate class size reduction forced school districts to hire under-qualified teachers. In Florida, a mandated reduction created an as yet unresolved budget crisis. Buckingham indicates that class size reduction would cost New Zealand an estimated NZ\$113 (US\$63 million) per year to reduce the pupil/teacher ratio by one student.

One of the most prominent features of Buckingham's report is her analysis of the long-running debate between researchers Eric Hanushek of Stanford and Alan Krueger of Princeton. Despite Krueger's contentions regarding certain research methodology issues, the data clearly supports Hanushek:

". . . even when estimates are weighted and manipulated so as to avoid perceived bias toward studies showing no effect of class size-arguably creating bias in the opposite

direction-the statistics do not show the 'systematic evidence of a relationship between class size and achievement' claimed by Krueger."

As Buckingham makes clear, even if one accepts Krueger's most optimistic assumptions, Hanushek correctly finds that two-thirds of the studies show that smaller classes produce no effect on achievement or a negative effect (i.e., the smaller classes had lower achievement).

Moreover, the debate between researchers like Hanushek and Krueger is mainly about whether studies show "statistically significant" effects, i.e., whether the achievement gain was due to class size or just a chance outcome. Statistical significance is the minimum necessary for scientific credibility. More relevant to the interests of policymakers and the public is practical significance, i.e., the matter of whether class size reduction yields an achievement gain that is worth the time, effort, and cost of producing it. As Buckingham makes clear, the tiny gains and high costs associated with class size reduction make it a very cost-ineffective way of improving student achievement.

Class Size Conflicts of Interest

Buckingham's analysis is particularly useful because she unravels the technical arguments that interfere with lay policymakers and the public arriving at an informed judgment. It also is a refreshing departure from the many studies reported by researchers

whose work is supported by and/or written for an audience that has a stake in a particular outcome.

Class size reduction may have only a small effect on achievement, but that is not its only impact. Teachers find it appealing because it lightens their workload and eases classroom management-particularly when students are little interested or badly behaved. Teacher organizations like smaller classes because they increase the number of teachers. And parents find class size reduction appealing because it permits more individual attention. However, compared with the achievement gains that can be produced by variables under teacher control, class size is a trivial factor. As Buckingham puts it:

"Only one thing comes through loud and clear from all of the research: what goes on in the classroom is more important than how many children are involved."

Article Details:

Buckingham, J. (2003). Class size and teacher quality. *Educational Research for Policy and Practice*, 2, pp 71–86.



Class Size and Teacher Quality

Jennifer Buckingham

The Centre for Independent Studies, PO Box 92, St Leonards NSW 1590, Australia

Abstract

The ‘Vinson Report’ on Public Education in NSW has become received wisdom. The report’s recommendation on class sizes has attracted more attention than any other. This is unfortunate because it is on this issue that the Report is weakest. A thorough appraisal of the research on class sizes reveals that many studies have methodological problems that make their application in a real world context doubtful; many studies have introduced other reforms such as curriculum changes at the same time as class size reduction, making their individual effects impossible to determine; the large majority of studies have found no significant effects of class size on student achievement, while the remainder have shown small benefits, usually only when classes have less than 20 students; class size has less effect when teachers are competent; and the single most important influence on student achievement is teacher quality. Research shows unequivocally that it is far more valuable, both in educational and fiscal terms, to have good teachers than lots of teachers. It must be ensured that the current and incoming teaching force is the best it can be, before seeking to expand it.

Key Words: child development, class size, public education, student achievement, teacher quality, teaching methods

Introduction

In 2000, the New South Wales (NSW) Teachers Federation initiated and funded an ‘Independent Inquiry Into Public Education in NSW’, chaired by Professor Tony Vinson. This year the Inquiry committee published its report (hereafter referred to as the ‘Vinson Report’).

The findings of the inquiry and the recommendations made in the three volumes of its final report received a great deal of media and political attention, and rightly so. The reports contain a wealth of information in the form of insights from students, teachers and parents, as well as previously unpublished data from the NSW Department of Education.

There are, however, two central problems. First, the committee seems to have made little effort to seek out and provide information beyond the submissions received, and only the most rudimentary of literature reviews and international comparisons are offered. Attempting to cover all the research on schooling would have made the report unwieldy and time-consuming, but there are important rea-

sons to be thorough. Issues such as class size, where expert opinion is far from unanimous, require detailed analysis at a primary source level. Further, the majority of submissions were from teachers, who are arguably (if understandably) biased toward smaller classes.

Second, the conclusions drawn on the basis of the information presented are debatable, and connections between the various troubles in schools are often not made. Anyone familiar with educational research and aware of the challenges that classroom teachers face on a daily basis knows that the difficulties associated with large classes are related to discipline problems and the wide range of abilities in each classroom. Similarly, what matters in a classroom more than anything else, including the number of students, is good teaching. The Vinson report does not make these important points explicit.

A thorough review of the research on class size and student achievement shows that much of it is flawed in ways that make it unreasonable to expect the same results in a real-world situation. Many studies have introduced other reforms at the same time as class size reduction, making the effect of class size alone impossible to determine. In most cases the persons participating in the experiment were motivated to produce positive results. Only a small minority of studies found any positive effect of smaller classes on student achievement, usually in classes of less than 20, and few of these effects were large.

The findings on class size suggest that there is little if any reason to believe that reducing classes from 25 to 20, as recommended by the Vinson Report, will have an effect large enough to warrant the cost. Research tells us that effective teaching is much more important than the number of children in the classroom. It is, therefore, much wiser to invest in the quality of teachers, rather than quantity.

Given the authority the Vinson Report and its principal author have been afforded, and the likelihood that the report will be referred to regularly in the future, it is necessary to point out its flaws and put reservations with its findings on the public record.

Class Size and Achievement

In the area of school reform, class size reduction seems to hold all the aces. It is popular with academics, teachers, students and parents alike. It seems intuitive that to have fewer children in a class is better.

Research appears to confirm this. Several large scale studies and many smaller ones find a relationship between learning and class size. But a closer examination reveals crucial methodological problems and generalisations that make the findings far less than definitive, even meaningless.

Reviewers of this research, who present it as evidence for the importance and efficacy of class size reduction, often either ignore these problems or acknowledge them in passing.

The Vinson Report had the scope and expertise to cover the issue of class size thoroughly, but it relates the findings of various studies, often from secondary sources, without the important caveats. These caveats are such that much of the research is inapplicable in other contexts. That is, the same results cannot be expected under different circumstances.

The report dismisses these problems. It concludes that the evidence of a relationship between smaller class size and better learning outcomes is strong and that the effect is large enough to warrant the expense of such reforms in NSW state schools. It recommends reducing class sizes in NSW state schools from a maximum of 25 to a maximum of 20 in Kindergarten through to Year Two (Vinson Report 1: 85).

Although class size reduction is one of the most expensive reforms proposed by the Vinson Report, only seven pages are devoted to justifying it. The merits of smaller classes are considered self-evident and inarguable, yet the report's literature review is incomplete and insufficient to confidently draw these conclusions.

Hundreds of studies can be cited on the relationship between class size and student achievement. Ehrenberg, Brewer, Gamoran & Willms (2001a) claim that:

Most have found some evidence that smaller classes benefit students, particularly in the early grades, and especially kids at risk of being underachievers. Unfortunately, most of these studies were poorly designed. Teacher and student assignments were rarely sufficiently random; a number of studies were simply too brief or too small, and too few had independent evaluation. (p. 78)

Other researchers, such as Hanushek (1998), go further, arguing that most of these studies are not only flawed but also fail to produce convincing evidence that class size has any significant effect on student achievement. Hanushek is not without his critics and some of their points of contention with his research are worth considering.

Hanushek versus Krueger

Economists Eric Hanushek of Stanford University and Alan Krueger of Princeton University have used different methods to conduct meta-analyses of studies providing estimates of class size effects up to 1994. The debate that has taken place in recent years between these two economists is very important.

Hanushek is well known for his research demonstrating that there is no direct relationship between financial resources and school performance. He claims that only a small minority of studies show a significant positive effect of smaller classes on student achievement.

Krueger is best known for his work on Project STAR. One of the largest and most influential studies of class size reduction, its results are frequently cited as proof of the benefits of smaller classes.

In a meta-analysis of 59 studies yielding 277 estimates of the effect of class size on student achievement, Hanushek (1997) found that 14.8% of these estimates were positive and significant. That is, students in smaller classes showed significantly

higher achievement than their counterparts in larger classes. The remaining estimates were either insignificant (no difference in achievement – 71.9%) or negative and significant (smaller classes had lower achievement – 13.4%).

Krueger (2002) argues that Hanushek's method of selecting studies, extracting and counting the estimates is irrational and has produced a biased result. Krueger's main criticisms are:

- The studies from which Hanushek drew the most estimates are those which produced insignificant or negative results.
- When an insignificant or unexpected result is found by researchers, it reduces their chance of publication so they often look for disaggregated effects, separating the sample into smaller sub-samples.
- This has two consequences. First, an over-representation of insignificant and negative estimates. Second, these estimates are less powerful because the sample size is smaller.
- It is, therefore, erroneous to count each of the effect estimates from multiple-estimate studies and give them equal weight as effect estimates from single-estimate studies.

Krueger proposes three alternative methods of analysis:

(a) Estimates should be given weights proportional to the number of estimates yielded in the study. For example, a single-estimate study should be counted as one, but an estimate from a study yielding four estimates should be counted as one quarter.

(b) Since some studies are better designed than others, these should be given more weight in the analysis. His suggested method is citation frequency; that is, studies which are referred to more often in academic literature would be given more weight.

(c) Because the smaller sub-samples in multiple-estimate studies reduce their statistical power, regression analysis should be used to estimate what the effect estimate would be if the study had yielded one estimate only.

Only the first of these is convincing. If Krueger is correct that multiple estimates from one sample are biased towards insignificance and that these results have a greater margin of error, they probably should have less weight in a meta-analysis and therefore less influence on the results.

Proposed methods (b) and (c) are problematic. Regarding the second, citation frequency is not a proven indicator of quality. It may just as easily be biased toward studies with one type of result or the other. As for the third, the further a statistical analysis moves from the original data, the more room for error and the less meaningful the results.

Hanushek counters Krueger's criticisms well.

- He argues that multiple-estimate studies provide more information than a single estimate and should not be weighted less in an analysis.
- He responds to Krueger's claim of over-representation of insignificant results from multi-estimate studies by restating Krueger's own argument that insignificant

Table 1
 Krueger's (2002) Re-analysis of Hanushek's (1997) Meta-analysis.

Result	Hanushek: Estimates weighted equally	Krueger (1): Estimates weighted by inverse of number of estimates in study	Krueger (2): Estimates weighted by citation frequency	Krueger (3): Estimates derived from regression analyses of original estimates
Positive & Significant	14.8%	25.5%	30.6%	33.5%
Insignificant	71.9%	61.2%	62.3%	58.4%
Negative & Significant	13.4%	10.3%	7.1%	8.0%

Source: Krueger (2002, p. 11.)

results are less likely to be published, implying that there is a bias toward positive significant results in the literature.

- He dismisses the accuracy of deriving single estimates from multiple estimates on the basis that different sub-samples of students (for example, disadvantaged students) will yield different results. This important information is lost with aggregation.

Whether one is persuaded more by the case presented by Hanushek or by Krueger, the strongest evidence is in the statistics produced by their various methods of analysis.

Table 1 shows that even when estimates are weighted and manipulated so as to avoid perceived bias toward studies showing no effect of class size—arguably creating bias in the opposite direction—the statistics do not show the ‘*systematic evidence of a relationship between class size and achievement*’ claimed by Krueger (2002, p. 31).

If we accept Krueger's first and least controversial proposal—that multiple estimates from a single study should not carry as much weight as a single estimate (which is debatable even so)—only one in four studies found that students in smaller classes had achievement rates significantly higher than students in larger classes.

Other Evidence

The above conclusion is consistent with the findings of other literature reviews. The Vinson report describes two national data analyses and four literature reviews as follows.

National data analyses:

- Wenglinsky (1997): In Years 4 and 8, '*lower student/teacher ratios were positively related to higher mathematics achievement*' (see Vinson Report 1, p. 83). Inconsistently, the report does not dismiss this finding due to the use of student/teacher ratio instead of class size, but does so with regard to the work of Eric Hanushek.
- Rees and Johnson (2000): "*...no evidence that smaller classes alone led to greater student achievement*" (as above).

Literature reviews:

- Glass & Smith (1979): '*...the major benefits of reducing class size occurred where the number of students was less than 20*' (as above).
- Robinson & Wittebols (1986): '*positive effects were less likely if teachers did not change their methods and procedures in the smaller classes*' (See Vinson Report 1, p. 84).
- Slavin (1990): Found that classes of less than 20 had a '*small positive effect on students that did not persist after they were removed from the smaller class*' (as above).
- Hanushek (1998): '*The evidence about improvements in student achievement that can be attributed to smaller classes turns out to be meagre and unconvincing*' (Hanushek 1998, cited in Vinson Report 1, p. 84).

Of the above six studies, three conclude that there is no lasting benefit to students of reducing class size, two conclude that classes must have less than 20 students to make a difference and one found that the effect of class size was mediated by teaching style.

As well as these reviews, the Vinson Report details the findings of three major studies they describe as 'trial programmes and large field experiments'— Project STAR, SAGE and 'Prime-Time'. Each of these is presented as proof positive that smaller classes are beneficial to students. Below, the Vinson Report's comments will be summarised, followed by a more accurate representation of the studies' findings.

- *Project STAR (Student Teacher Achievement Ratio) in Tennessee:*

According to the Vinson Report:

This is the 'most scientifically rigorous' and 'best-designed field experiment ever' (Vinson Report 1, p. 82). The findings reported are that the positive effects of small classes (13-17 students) in K-3 on achievement levels are cumulative (the longer the time spent in a small class, the larger the effect) and persistent (the effect lasts into later grades when students return to regular size classes). It also reports that gains were greater for disadvantaged students.

The Vinson Report acknowledges that the non-random self-selection of schools into the project may be a problem, because such schools might have a greater interest and enthusiasm for such reforms, perhaps inflating the results.

Missing from the Vinson Report:

The source of the Vinson Report's information on Project STAR is not clear, but very recent analyses of the Project STAR data by its principal researchers is less straightforward. In a 2001 article, Jeremy Finn and colleagues reported that the gains made by small class students on their regular class peers declined when they returned to regular classes, and that significant enduring effects of class size occurred only for students who had been in a small class for three or four years. There was only weak and mixed evidence of a larger effect for minorities (Finn, Gerber, Achilles, Boyd-Zaharias, 2001).

Another study from principal researchers on Project STAR found that classroom practices differed between the small classes that achieved the largest and smallest gains (Boyd-Zaharias & Pate-Bain, 2000). That is, small class benefits were mediated by the quality and method of teaching.

Although it makes a nod to it, the Vinson Report does not explain the full ramifications of the fact that Project STAR suffers from the methodological problem of the 'Hawthorne Effect'. This is where the participants in an experiment are aware of their role and the potential consequences. Hoxby (2000) explains that this causes three problems: First, incentive conditions are altered, so that results produced under experimental conditions may not necessarily be the results in reality. Second, some people temporarily increase their productivity while being evaluated, especially if they have an interest in the experiment succeeding. Third, people sometimes undo the randomness of the experiment due to external pressures, for instance by placing certain children in small classes due to demands from parents.

The methodological problems of Project STAR cannot be dismissed as 'criticisms'. They create serious doubt over whether the results achieved by Project STAR would be replicated under different conditions.

Even if these doubts could be set aside, the findings are inconsistent with the recommendations made by the Vinson Inquiry. Small classes in Project STAR are 13-17 students. Barbara Nye of Tennessee State University, who has studied the results in detail, has been quoted as saying that '*the public shouldn't necessarily expect the same results from classes of around 20 as those of 15. It's taken a long time to get that message across*' (Jacobson, 2001). It seems the message still has a way to go.

Not only does the Vinson Report recommend that class sizes be reduced to a number that has not been shown to have any effect, it also recommends doing this in classes from Kindergarten through to Year 2 at the same time. In Project STAR, enduring results were only found for students who had been in a small class for three or four years. This suggests that it would not be effective to reduce classes in all year levels at once, but to stagger class size reduction, beginning with a kindergarten cohort.

Given that the Project STAR findings could be viewed as irrelevant, it may seem futile to point out how they should correctly be interpreted. But the fact that they have been reported inaccurately and without sufficient thought to their implications indicates the incautious approach taken to this research in the Vinson Report.

● *The SAGE (Student Achievement Guarantee in Education) in Wisconsin:*

According to the Vinson Report:

Under the SAGE programme, K-3 classes were reduced to an average of 15 in schools where at least 50% of students were living below the poverty line. Findings cited are those from a 1999 study showing that ‘Year 1 students in the SAGE program achieved better test results than students in comparison schools in language, arts and maths. Results from grades two and three generally follow the same pattern’. (Vinson Report 1, p. 83).

Missing from the Vinson Report:

More recent evidence published by Molnar, Smith, Zahorik, Halbach, Ehrle, Hoffman and Beverley Cross (2001) confirms that students in SAGE schools performed significantly better than students in comparison schools on a variety of measures.

Most importantly, however, this cannot be attributed to reductions in class size. Schools involved in the SAGE programme implemented a variety of reforms at the same time:

1. class-size reduction
2. a longer school day and increased collaboration with community organisations
3. a more rigorous academic curriculum
4. staff development and accountability mechanisms.

In addition, the same team of researchers discovered important differences in teaching styles between SAGE and comparison schools. Instruction in SAGE schools was predominantly teacher-centred as opposed to student-centred. (Molnar et al., 2001). Differences were also identified between classrooms within SAGE schools. Teachers in higher achieving classrooms showed a preference for structured, goal-oriented, explicit instruction and classrooms with established routines where learning proceeds sequentially and at a quick pace. Teachers in lower achieving classes tended to believe that the primary advantages of reduced-size classes are the opportunities to develop critical thinking, to permit students to choose their activities and to have more activities and problem-solving lessons. They also had a more permissive management style and a more random lesson structure.

So, as in Project STAR, the aptitude of the classroom teacher is the key, not the number of children.

● *Prime-Time project in Indiana:*

According to the Vinson Report:

The initial results of a two year study in 24 schools where classes were reduced to an average of 18 were ‘so promising’ (Vinson Report 1, p. 83) that K-3 class sizes were reduced in all Indiana state schools. One analysis apparently found ‘substantially larger gains in reading and maths achievement for students in small classes’ (McGivern, Gilman and Tillitski (1989) cited in Vinson Report 1, p. 83).

The Vinson Report gives a more accurate representation of the value of this study than it does of STAR and SAGE. It notes that the study was not random, that other changes in school policy occurred at the same time and raises the possibility that teachers were motivated to ensure that small classes worked.

Missing from the Vinson Report:

The extension of class size reduction from the original 24 schools to all schools occurred after only one year. Even reviewers who favour class size reduction have admitted it was therefore ‘not possible to compare results for small classes with a comparable group of larger classes’ (Biddle & Berliner, 2002, p. 6). The results cited in the Vinson Report were actually from a study of data collected before project Prime Time was initiated.

Several other large scale studies have been conducted, the results of which are not presented in the Vinson Report. They are summarised briefly below.

● *California Class Size Reduction Initiative:*

Inspired by Project STAR, K-3 class sizes in all Californian schools were reduced from a maximum of 33 (average 29) to a maximum of 20. To meet this requirement, schools were forced to hire underqualified teachers.

The Class-Size Reduction (CSR) Research Consortium concluded on the basis of four years of data analysis that ‘no strong relationship can be inferred between achievement and CSR’ (Stecher & Bohrnstedt, 2002, p. 2). Jepsen & Rivkin (2002) found that the large number of extra teachers demanded by CSR led to a deterioration in teacher quality which in some cases fully offset any benefits of smaller classes.

● *Hoxby’s (2000) Population Variation Study in Connecticut:*

In this study, Hoxby (2000) looked at the relationship between achievement and changes in class size due to natural variation in age cohorts in the population. This observational approach avoids possible experimental manipulation effects. She uses two different methods to compare the class size and achievement of adjacent cohorts, taking into account enrolment data and maximum class size regulations.

Neither method shows that smaller classes produced achievement gains. Even given the precision of the data analysis, which allowed tiny improvements to be significant at the 5% level (the improvements found in Project STAR would have been significant if found in this study), the effect of reducing class size was estimated to be close to zero. Further, the results do not suggest that class size reductions are more effective in schools that serve low-income or African American students (in fact, the only significant result was an improvement in fourth grade reading scores of high-income students).

● *Christchurch Health and Development Survey:*

A longitudinal study conducted in New Zealand, although not designed to study class size effects, has yielded information that can be used as an observational study.

Boozer and Maloney (2001) first compared the results of children permanently in small (19), medium (29.9) and large (33.8) classes between the ages of 8 to 13 years. Only a small number of students were permanently in classes of these sizes over the age period, and the results were insignificant. They then compared students whose *average* class size over this age period was small (21.2), medium (29.7) or large (33.2). They found significant effects only for children in *persistently* smaller average classes between the ages of 8 and 13, on both childhood test score improvements as well as on early adult outcomes such as completed education and unemployment.

- *UK National Child Development Study*

In another observational study of existing data from the 1960s, Iacovou (2001) controlled for school type/size and streaming to account for the possibility (and some evidence) that less able children are more likely to be allocated to a smaller class – which would make the difference in achievement in different size classes internally created.

Iacovou looked at average class size at age 7 (excluding students in classes of less than 20 and more than 45) and found that class size was related to student attainment in reading but not maths. A smaller effect persisted to age 11 only for girls and for children from large families. There was no evidence of greater benefit to disadvantaged students.

- *Third International Maths and Science Survey (TIMSS)*

Class size effects for 18 countries were estimated using maths and science performance in TIMSS and average class size data. Woessmann and West (2002) found that class size effects varied greatly between countries, with large effects in only two countries: Greece and Iceland.

When they compared these countries with those where no class size effect was found, several things were apparent. First, countries with large class size effects performed below average internationally, whereas those with small or no class size effects performed above average internationally. Also, countries with large class size effects had less educated, lower paid teachers compared to countries with small or no class size effects.

From this they drew several conclusions. First, class size effects cannot be imputed from one country to another because school systems vary significantly. Second, class size is more important when teachers are less effective. Investment in fewer, more highly educated and better paid teachers seems to result in higher student achievement.

Australian Research

Australian research on class sizes is scarce. A study by Bourke (1986) in Melbourne in the 1980s found that smaller classes were related to higher achievement in maths, but Keeves (1995) has noted that analysis of these results at the class level revealed that class size was also related to student ability (sorting) and that

controlling for this changed the relationship between class size and achievement. Keeves concludes that '*there is little clear evidence to support the costly reductions in class size*' (Keeves, 1995, p. 148).

Research conducted in Brisbane by Jack Cambell is often cited in support of smaller classes. Published in a magazine of the Queensland Teachers Union in 1991, this study is difficult to obtain. Secondary sources describe it as finding that reducing classes from 35 to 26 students increased the 'time on task' by 22 days per school year (Australian Education Union, 1995). Whether this study controlled for the sorting factor which caused problems in Bourke's study, and how increased time on task might have translated into increased student achievement is not known.

The analysis of TIMSS results described above did not lead to any meaningful findings for Australia. The researchers found that average Australian class sizes in maths and science were not good proxies for actual class sizes, so differences in student achievement between classes of different sizes could not be confidently attributed to the size of the class.

Implications

The Vinson Report estimates that the reduction of class sizes to a maximum of 20 in Years K-2 would cost \$47 million dollars per annum in disadvantaged schools and \$225 million per annum in all schools. This is the most expensive recommendation made, the all schools figure of \$225 million exceeding the total cost of all other recommendations by 40%.

Even this figure underestimates the cost of class size reduction as it accounts only for extra staffing costs. Each additional teacher necessitates an additional classroom, must be educated and trained, will need extra classroom resources and require on-going professional development. The cost of more classrooms has been conservatively estimated by the NSW Opposition to be in the order of \$140 million initially (Liberal Party of New South Wales, not dated).

Not only is the cost large, but the findings of the studies described above are mixed and weak at best on the issue of class size. Only one thing comes through loud and clear from the research: what goes on in the classroom is more important than how many children are involved. This is not to say that classroom activity is unaffected by the number of children, but that proven and appropriate teaching methods are paramount.

What then does the Vinson Report make of this? It recommends that large scale class size reduction takes place in state schools, bringing class sizes in K-2 to a maximum of 20. The report says that it has been guided 'not only by the consistency of the findings, but also the quality of the research yielding particular results' (Vinson Report 1, p. 84).

Much of the Vinson Report's information on class size research comes from a short literature review by Biddle and Berliner (2002), including their conclusions, which are reproduced verbatim. Yet Biddle and Berliner seem just as confused as

the authors of the Vinson Report, claiming that '*Although the results of individual studies are always questionable, a host of different studies... suggest a number of general conclusions*' (p. 14), namely that class size reduction is beneficial for students in the short and long term in academic achievement and other outcomes. In other words, these authors seem to be saying that a large number of poorly designed studies with mediocre results can be amassed into strong evidence of a significant effect.

Even less convincing is the Vinson Report's attempt to justify their recommendation in the face of the evidence they have presented to the contrary. They argue that policy makers should not '*await an unlikely total consensus... but to base policy on the best available information, after considering the strengths and limitations of the research*' (Vinson Report 1, p. 81). Complete agreement from researchers may be too much to ask, but if the Report's authors follow their own advice and seriously consider the evidence presented, notwithstanding the evidence they neglected, they would have to conclude that the best available information is that reducing class size by the amount they recommend would not justify the expense.

Theories and Fallacies of Class Size Reduction

There are several theories as to why smaller classes should be beneficial:

1. Increased individual attention and instruction;
2. Greater scope for innovation and student-centred teaching;
3. Increased teacher morale;
4. Fewer disruptions.

The idea that a teacher can devote more time to each student in a smaller class, thereby increasing the amount students learn, is the most intuitively appealing of all these theories. Yet simple calculations show this appeal to be misplaced.

In a six hour school day, approximately five hours is spent in the classroom. If half this time is spent directly addressing the class, and the other half on individual attention, each child would hypothetically receive six minutes of individual instruction in a class of 25 and 7.5 minutes of individual instruction in a class of 20. That is, an extra \$1150 per student per annum (Vinson Report, p. 86) buys an extra 1.5 minutes per day of teacher's time. If two-thirds of classroom time is spent on individual attention, students get two minutes more in a class of 20 than 25.

These calculations may be simplistic, but indicate the insubstantial change in individual attention that a 20% reduction in class size brings, at considerable cost.

Another counter to the individual instruction theory comes from Project STAR. Some of the regular size classes were assigned a teacher's aide. Even though children in these classes presumably had twice as much individual attention, there was no difference in achievement levels between regular size classes with and without teacher's aides.

The second theory – that small classes provide the potential for more effective teaching strategies – suggests that class size may be conducive to greater student achievement but does not guarantee it. It also suggests that small classes alone do not produce gains in learning; that their benefits are mediated by teacher quality. Research discussed earlier demonstrates that there were notable differences in teaching and classroom management styles between high and low achieving small classes.

Teachers rarely change their teaching and classroom management styles. Even Project STAR data shows this, with few teachers modifying their classroom practices in different size classes after attending a professional development program (Ehrenberg et al., 2001b). If this is the case, then reducing class size will have little or no effect without ensuring that teachers adopt instruction and management practices proven to be effective in small classes. This substantial investment in professional development once again adds to the cost of class size reduction, and would more than likely be equally effective without changing class sizes.

The last two theories of small class benefits are related and are the most convincing. Small classes are overwhelmingly popular with classroom teachers and it is not difficult to understand why. Schools are being forced to cope with, and attempt to educate, an increasing number of students who are uninterested and badly behaved. In some areas of Sydney, schools have difficulty attracting and retaining teachers primarily for this reason and teachers in all areas are finding their jobs more and more difficult and stressful.

Fewer students like this in a class would make teaching much easier. Reducing class sizes might be justifiable if it can be shown that the increased cost of reducing class size is offset by the decreased cost of teacher attrition, stress and sick leave.

It must be ensured, however, that a new demand for teachers does not result in the same situation as in California, where the least qualified and least experienced teachers were disproportionately employed in the most disadvantaged schools. The most simple and effective way to avoid this is to offer financial incentives for teachers in difficult-to-staff schools, which means departing from rigid wage structures based on years of service.

Teacher quality

Commonsense says that it is better to have a great teacher in front of a large class than a mediocre teacher in front of a small one.

Writing in the Bulletin of the US National Association of Secondary School Principals, Kaplan and Owings (2002) state that '*Research affirms that teaching quality is the single most important factor influencing student achievement*', and cite a wide variety of supporting studies. According to Ronald Ferguson, a Harvard University economist, research shows that teacher quality, not class size, is the most important factor in education (Matthews & Strauss, 1997). Australian research has

also shown that the largest differences in achievement between students is that between students in different classes (Rowe, 2002).

The 'Ramsay Report' on the Review of Teacher Education in NSW (Ramsay, 2000), provides plenty of evidence to support the primacy of teacher quality, demonstrating the impact of teachers on student achievement and the benefits from investing in teacher education.

Although much has been said about the importance of teacher quality, what makes a good teacher is yet to be adequately defined. We know that some teachers bring about higher levels of achievement from their students than others, but consensus on how is still elusive.

A certain proportion of good teaching comprises temperament, charisma, enthusiasm and other qualities that cannot be measured or taught. However, several criteria can be identified:

1. mastery of subject matter and curriculum content;
2. awareness of the individual abilities and capabilities of students;
3. classroom management skills;
4. use of teaching strategies that are proven effective;
5. good verbal communication skills.

Each of these capacities is necessary but insufficient on its own. Strong content knowledge is crucial but not enough – teaching also requires a set of professional skills separate from but related to the subject being taught (Darling-Hammond, 2000; Haycock, 1998; Goldsmith, 2002). These skills are supposed to be gained from teacher education courses.

What constitutes effective pedagogy is beyond the scope of this paper, but there seems to be agreement that teacher education in Australian universities is inadequate in imparting both pedagogical and behaviour management skills to teachers. There is too much emphasis on the theoretical over the practical – too much Bloom and not enough classroom. New teachers have usually spent only a few weeks in teaching practicum, and support for them in the extremely difficult first year in a school is patently inadequate (Ramsay, 2000; Vinson Report 3, Chapter 11).

Another problem is the lack of ongoing professional development for classroom teachers. The NSW Department of Education undervalues the need for teachers to be aware of new developments in both curriculum and pedagogy, and teachers have too few incentives to seek out professional development opportunities for themselves.

Improving the quality and effectiveness of the teaching force as a body will not be achievable through better pre-service and in-service training alone. Some teachers will be unaffected by any amount of professional development. Improving the teacher force involves both enhancing the skills of willing teachers and removing incompetent and unwilling teachers.

This is best achieved by allowing schools to hire and fire. The centralized staffing of public schools in NSW is one of their greatest impediments to success.

Given that teachers are the most important influence on educational achievement, the inability of public schools, whether through principals or school boards, to 'choose their team', puts them at great disadvantage.

Conclusions

When it comes to teachers, quality is far more important than quantity. The recommendations on class size reduction serve only to weaken the case for more urgent and supportable interventions, such as improved teacher education and professional development.

Given that good Australian data on class size effects is non-existent, and that research from other countries is inconclusive on whether there are even marginal benefits from class size reduction, it is prudent that governments seek more evidence before embarking on what will eventually be a multibillion dollar spending spree.

Ultimately, however, decisions about class size are best left to schools. Given the opportunity to use their funding allocation as they see fit, some schools might decide to have slightly larger classes with better qualified teachers, or invest in a 'floating' teacher trained in special needs education. Mandatory maximum class sizes set at an arbitrary figure are yet another unnecessary restriction on schools' ability to use their resources in ways that best meet the needs of their students.

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Westlake Academy

Memo

To: Honorable President and Members of the Board of Trustees

From: Rod Harding, Middle Years Principal

Subject: Meeting of November 1, 2010

Date: October 26, 2010

ITEM

Wkshp Presentation and Discussion of International Schools' Assessment (ISA).

WESTLAKE ACADEMY MISSION/ VISION STATEMENT

Westlake Academy is a nurturing, community-owned International Baccalaureate charter school whose mission is to achieve academic excellence and to develop life-long learners who become well-balanced, responsible global citizens.

WESTLAKE ACADEMY VALUES

- Academic Achievement
- PYP, MYP, DP (IB Continuum)
- Caring Environment
- Fiscal Stewardship
- Communication/Transparency
- Engaged Stakeholders
- Maximizing Each Child's Potential

BACKGROUND (including policy implications and options):

This particular ISA presentation, discussion and proposed implementation relates directly to the Westlake Academy Strategic Plan under the Desired Outcome category of High Student Achievement and under the following Specific Outcome sections: 1.6 and 1.6.2

- 1.6 - Review the use and interpretation of college skills readiness exams, which are necessary to gauge the student's ability to perform at college level
- 1.6.2 - Explore the use of the program for International Schools' Assessment (ISA), Progress in International Reading Study (PIRLS), Trends in International Mathematics and Science Study (TIMMS), iCritical Thinking Certification etc as tools of student progress

The International School's Assessment (ISA) was presented to WA staff in October for comments and its appropriateness for use at Westlake Academy. The staff felt that this was an international assessment that would compare academic results of other like schools (IB) and provide Westlake Academy with a comparable international standard in the areas of Reading, Writing and Mathematical Literacy.

Staff proposes that this assessment be administered to Grades 5 and 8 in February 2011. This assessment will replace the use of the Stanford Assessment.

FUNDING

The ISA external testing costs are included in the approved 2010-2011 WA budget.

RECOMMENDATION

After the conclusion of the PowerPoint presentation, Staff would like to field any questions or concerns that the Trustees may have regarding the recommended implementation of the ISA assessment and approve administration to Grades 5 and 8, beginning in February 2011.

ATTACHMENTS

N/A

Westlake Academy

Item # 5 –
Board Governance

DISCUSSION OF BOARD OF TRUSTEE GOVERNANCE AS ILLUSTRATED IN DR. BRIAN CARPENTER'S *CHARTER SCHOOL BOARD UNIVERSITY: AN INTRODUCTION TO EFFECTIVE CHARTER SCHOOL GOVERNANCE*; CHAPTERS 8-9.

What Governing and Parenting Have in Common

I have often thought to myself that being a governing member of a charter school board is a lot like being a parent: The responsibilities of both are gargantuan, and you come to both jobs without any real training or preparation. (In the case of parenting, I should say, the job comes to you.) But just as conscientious parents seek advice from other effective parents, read books on parenting, and attend workshops, board members who want to build world-class charter schools will do the same. “Spoken like a guy who writes and speaks on governance,” you say. Guilty as charged, but allow me to make my case.

I’ll begin by commenting on the fact that governing a modern public school is a complex task. The board’s skills must be suitably developed to be equal to the tasks at hand. The following excerpt from *The Five Dysfunctions of Charter School Boards* speaks to this complexity.

There was a time when a school board could do its job with little or no expertise required. A hundred years ago, if you could read and cipher, you probably would have been considered well-qualified to help govern a school.

Not anymore.

These days, schools are complex organizations. The list of things about which charter school board members should have a working knowledge includes, but is not limited to, the following:

A wise board recognizes the need for training to develop its skills.

- No Child Left Behind Act (NCLB)
- Individuals with Disabilities Education Act (IDEA)
- Sizable amounts of state-level public school code including your state's charter school requirements
- Financial reporting
- Contractual agreements
- Funding, construction, and maintenance of school buildings
- Employment law
- Management companies
- Student achievement and performance measures
- The governance process
- Policy development
- Fund development
- Negotiating skills
- Union tactics
- The politics of school choice
- Marketing
- Media relations

And the list really could go on. What's my point? It's that specialized knowledge and skill sets are required to govern a charter school. A wise board recognizes the need for training to develop its skills. The remainder of this chapter discusses four easy ways to do that.

First, look around your board and identify the experts sitting at the table. One person might be able to train the board on how to understand financial statements. Another person might be able to give the board a quick summary of pertinent governance laws, such as the Open Meetings Act in your state. Someone else might know a lot about property development, land costs, etc. Your executive should be an expert on educational matters to say the least.

As discussed in Chapter 15, *The 30/30/30 Agenda*, it is perfectly legitimate for the board to allocate part of its time in regular meetings to board development. You can ask different experts on your board to

conduct those development sessions. Although I recommend that the focus of the board's self-development time be spent on governance, it is also valuable to use some time for the board to learn about education related matters.

Second, just as you are reading this book, there are other books and resources you can study *outside* of board meetings. Not sure what to read? There are numerous resources listed in this book alone. Here's a quick bullet list of what we might call my top eight for board members:

1. *Charter School Board University (second edition)* by Brian L. Carpenter
2. *The Seven Outs: Strategic Planning Made Easy for Charter Schools* by Brian L. Carpenter
3. *Boards That Make a Difference* by John Carver
4. *Reinventing Your Board* by John Carver
5. *The Knowledge Deficit* by E. D. Hirsch, Jr.
6. *Charter Schools: Creating Hope and Opportunity for America* by Joe Nathan
7. *No Excuses: Closing the Racial Gap in Learning* by Abigail Thernstrom and Stephan Thernstrom
8. *Sweating the Small Stuff: The New Paternalism and Inner City Schools* by David Whitman

Looking for something shorter than a book? The National Charter Schools Institute publishes several monographs a year. These can be downloaded at www.NationalCharterSchools.org and reproduced free of charge.

Third, it is likely that your state has an active charter school association. Most of them hold annual training conferences. These are usually very inexpensive to attend, and have a wide variety of sessions, including sessions for board members. Be sure to find out when your association's conference is held so that you can put it on your calendar far in advance.

Be sure to register and reserve your hotel room in advance because some conferences sell out a reserved block of rooms at a discounted rate months before the conference. Also, as long as your board votes its approval, the cost of attending can and should be paid by the school unless otherwise prohibited by law in your state. A board that doesn't budget funds for board training isn't taking its development very seriously.

Fourth, your board may want to consider holding an annual retreat. The beauty of a retreat, if properly facilitated, is it allows the board to shift its focus from some of the more mundane aspects of governance (and there are definitely some of those) to a more strategic level. Usually boards allocate part of their time for a strategic review of the school's performance, and part of their time for board development. Some boards are even able to host their retreats off campus. As long as the costs are reasonable, it's a legitimate part of running the school.

By the way, a board retreat is a great time to welcome new board members. At their first meeting they will come away with a big picture sense of where the school is and where it is headed, as well as some sound governance training. Of course, you know who you can call to facilitate the retreat.

For Further Evaluation

Set aside 30 minutes in a board meeting to thoughtfully discuss the following questions:

1. Has your board ever held a retreat where developing its own governance capacity was the topic?
2. Does your board regularly allocate specific time on the agenda to developing its skills?
3. Does your board read and discuss books on governance?
4. Does your board expect the executive and faculty to continuously update their knowledge and skills? (Hint: The correct answer is, "Absolutely!") If yes, don't you think it's a bit hypocritical of some boards to expect this of their executive and faculty, but not exemplify the attribute themselves?

A board that doesn't budget funds for board training isn't taking its development very seriously.

► Additional Resources

Besides the books listed in this chapter, there are periodicals, both print and electronic, as well as organizations that produce information usable by charter school boards. Here are a few of the ones I think are the most important.

The Center for Education Reform is an excellent pro-charter advocacy organization. According to their Web site, CER “offers research, resources and talking points on education reform issues including accountability, charter schools and school choice, standards and testing, and more.” For information, visit their Web site at www.edreform.com or call 1-800-521-2118.

Education Next is a quarterly journal of the highest quality. It would definitely be of interest to you if you are an academic. The articles cover trends and issues in education reform, including charter schools. You can subscribe at <http://www.educationnext.org>.

School Reform News is an outstanding monthly news magazine that tracks education issues, including charter school news, across the country. You can subscribe to this at www.heartland.org. (In the interest of full disclosure, I have received compensation for stories and book reviews I have occasionally written for SRN.)

US Charter Schools is a free electronic newsletter published by the National Association of Public Charter Schools. You can subscribe at <http://www.uscharterschools.org>.

Two Questions People Always Ask About Boards

Whenever I speak on governance at conferences, the same two questions invariably arise: “How big should a board be?” and “What kinds of people make the best board members?” I’ve been asked these questions so many times that I figured I’d include the answers to them in this book.

Before answering, however, I want to state an important caveat: both questions lack widely agreed upon answers; reasonable people can and do disagree. The answers in this book are my opinions, albeit they are opinions based upon two decades of sitting on all sides of the board table (i.e., employee of boards, board member [including a charter school board], and consultant to boards).

With that caveat in mind, let’s tackle the first question: How big should a charter school board be?

Historically, my answer has been, the smaller the better, usually something in the range of five to seven members. Recently, however, I was having lunch with Suzi Harris, executive director of the Delaware Charter School Network who caused me to rethink my position. She said she favors 13 members. When I asked her why, she pointed out that it is much easier for three or four people on a small board to hijack the mission of the school, but with a board of 13, you’d have to have seven people agreeing with one another to do so. And of course, it’s difficult to get seven people to agree on anything. That’s a good thing when it comes to preserving board cohesion.

I told her that I had never considered that before, but that I thought her insight was an excellent one and that I would be putting it in the second edition of this book. (Lesson here is, be careful what you say to me--it may find its way into a future edition.)

Still, my points from the previous edition on small boards are still relevant, so I reiterate them here. The advantages of smaller boards are as follows:

1. In our busy society, it is difficult to get a board with a larger number of members to align their individual calendars for meetings, much less for board retreats--which, when properly facilitated, are just as important as meetings. Let's consider, for example, a retreat for a hypothetical board of 13 as the size wisely proposed by Suzi. If just four members can't attend, almost a third of the board will be out of sync with the rest of the board following the retreat. Small boards have the advantage of coordinating fewer calendars. A board of seven probably wouldn't continue with a particular retreat date if a third of its members couldn't make it.
2. I haven't typically observed boards much larger than five to seven people work very efficiently. In part, this is because people need time in board meetings to discuss and debate varying points of view. The larger the board, the longer the meetings have to run in order to allow everyone the chance to participate. A workable exception to a larger board, however, would be one in which it only meets two to four times a year (a model I like, if your state allows it). Generally, though, such meetings last an entire day, which allows for full participation.
3. Even though the school's executive technically reports only to the board as a whole, the reality is that he or she must develop good relationships with each individual board member. This is hard enough to do with a board of seven, much less a board of 13.
4. When it comes time to recruit new board members, the fewer the board has to recruit, the more manageable the process will be.

So generally, I favor smaller boards, although I think Suzi's point has considerable merit. But maybe your board is much larger. If it works for you, meaning your school gets extraordinary results, I'm happy. Your challenge will be that the board may become unwieldy. When that happens, there is no cohesiveness in board meetings, and the board will unnecessarily waste time rehashing its previous discussions and decisions for the benefit of one-third of the members that weren't at the last meeting. Still, board size is not sacrosanct, so if you have a larger board and it's working fine, run with it.

Let's move on to the second question: What kinds of people make the best board members? In actuality, getting the right people on the board is a far weightier consideration than deciding on the number of board members, so I want to emphasize some specific points.

Usually, when I answer this question, I begin with a bit of humor by identifying those whom I don't think make good board members: soccer moms. With apologies to all the wonderful soccer moms out there, what I mean is, I try to avoid school board members who have too much time on their hands during the school day.

Invariably, people with too much time on their hands wind up at the school way too often. They wander the hallways, informally polling teachers and students, and in the worst of governance environments, attempt to direct employees. They often sit uninvited in classrooms, assessing teachers and engaging in inappropriate conversations with administrators and parents. They then usually bring their unasked for observations from their self-appointed rounds back to the board table. If a board is looking for a way to confuse staff, frustrate the administrative team, and otherwise interfere with operations, this kind of board member is the perfect device. Excusing their actions by saying they are "only trying to help" is as uninformed about good governance as it is harmful to the school.

So I strongly recommend that you recruit board members who have full-time responsibilities elsewhere. In other words, you want people

who are too busy to “help” the administrator because they are occupied with their own jobs.

And while we’re on the subject of people who don’t make the best board members, let’s add five other categories, all due to the fact that none can be objective: (1) school employees (not even the executive needs to be an ex officio member of the board because it is an inconsequential distinction), (2) spouses of school employees, (3) people who have substantial business interests connected to the school, (4) parents of students in the school, and (5) students. Since about half of every charter school board is composed of such people, I’ve probably irked most of my readers. Please let me explain.

When the premise for the board’s existence is to ensure the school accomplishes all that it should (explained in Chapter 6), it is obvious that the board must continuously be evaluating how well this is occurring. When you place staff members in the position of evaluating their own work, you are essentially asking them to decide if the outcomes they are producing are good enough to keep their own jobs.

When the premise for the board’s existence is to ensure the school accomplishes all that it should (explained in Chapter 6), it is obvious that the board must continuously evaluate how well this is occurring. When you place staff members in the position of evaluating their own work, you are essentially asking them to decide if the outcomes they are producing are good enough to keep their own jobs. Hmm. So, let’s see now. Suppose I’m a faculty board member at your school. I’ve got a mortgage payment, a car payment, and a kid in college. Yes, I think I’ve been doing a good enough job to keep it. Thanks for letting me objectively decide.

Additionally, I think it’s organizational nonsense for a board to expect an executive to evaluate his or her subordinates every day but then reverse the relationship at the board meeting. For one thing, doing so jeopardizes the effectiveness of the school, along with the morale of the staff, because no executive is going to be candid with a board member employee. This is especially true if a critical performance appraisal is warranted, or even worse, if the executive needs to terminate that person’s employment.

Schools that violate this principle because they “have a unique person in the role of executive” always pay a price. Yes, I’m aware that having faculty employees on the board is required by law in a few of states,

so if you're in one of those states, you have no choice. All I can say is, the board better go the extra mile in making sure the operational policies delineate authority boundaries. At a minimum, the board needs to address how termination of employee board members will occur if it becomes necessary. (Requiring the executive to get the permission of the board to hire or fire any employee is a grave governance error.)

Spouses of school employees also lack objectivity because the employee's viewpoint will disproportionately influence the board member to whom they are married. As a former school executive, I've faced the difficult situation of replacing teachers who were married to board members. I did it when it was in the best interest of the school, but in the long run, I always paid a political price. It would have been better had spouses not been on the board at all.

People who have substantial business interests in the school are going to experience conflicts of interest. Be cautious too, about spouses of people with substantial business interests in the school. I've seen a couple of situations where boards paid twice as much for a piece of property as they should have, probably due to the spouses of people who had substantial business interest in the property serving on the board.

Next, I exclude parents with children in the school from the list of people who make the best board members. The reason for excluding them, however, may seem counterintuitive, so let's explain it.

The issue at stake is whether the board will properly represent the interests of the owners. When there is a conflict with what is in the best interest of the school and what is in the perceived best interest of their children, parent board members are likely to vote for the latter.

I once heard about a charter school, for example, where a handful of parents on the board were rewriting the administration's homework policies because they felt that their own kids were doing too much

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I once heard about a charter school, for example, where a handful of parents on the board were rewriting the administration's homework policies because they felt that their own kids were doing too much homework. Another board wanted to review and approve classroom parties because some board member parents objected to certain holidays and didn't want their kids participating. Neither of these constitutes governance by any stretch of the imagination.

homework. Another board wanted to review and approve classroom parties because some board member parents objected to certain holidays and didn't want their kids participating. Neither of these constitutes governance by any stretch of the imagination.

Parents also tend to be naturally networked into subsets of other school parents (e.g., other parents with kids in the same grades, etc.). The result is often that parent members think they are on the board to represent the interests of that subset. They're not. Again, all board members are there to represent the interests of the owners (see Chapter 6).

Finally, I exclude students as good board member candidates. Some schools, usually as a result of a misguided notion as to the purpose of a board, permit a student as a board member (though usually ex officio). To my way of thinking, this is just plain silly for at least three reasons: (1) students will think they are on the board to represent "the voice" of students, (2) students do not have the life experience to sit in judgment of professionals who have earned their positions, and (3) students have too many other more immediate responsibilities with which their attention should be occupied (e.g., getting into college, maintaining their grades, working to learn the value of earning and saving money, etc.). (And I might add a fourth, but admittedly serendipitous reason: students may miss valuable board training because their mothers want them to come home, as occurred at a training I was doing from 3:00 p.m. to 9:00 p.m. No kidding. We broke for a dinner break around 7:00 p.m., when the student board member came up to me and politely apologized that he would have to miss the rest of the board retreat because his mother had ordered him home.)

Yes, I want kids to learn responsible governance--but that's what student councils are for. A school board is not a toy or even a lab. It's a public body charged with a serious responsibility. It is not a forum for kids to learn governance.

Okay enough of describing those who don't make the best board members. It's time to describe who does.

Foremost, you want people who are devoted to creating a quality charter school. That might seem like a given to you, but I occasionally run into board members who don't even believe in the charter idea.

Next, I prefer board members who understand the intricacies of operational execution and business finance. They come to the table already knowing how to interpret financial statements and they usually refrain from Monday-morning quarterbacking. You typically find this kind of board member running a business of his or her own, or for others. Bankers, investment advisors, insurance brokers, and accountants also often possess these skills. The right business people also have enough work of their own to preclude them from trying to help the executive do his or hers.

The best board chair I ever had was Brian Utermahlen, a West Point graduate, Vietnam veteran, and former commanding officer of an Army Reserve helicopter squadron, as well as a DuPont executive. Brian's ethics are impeccable and he often prevented the board from descending into trivial discussions. He understood the operational vicissitudes of running an organization, as well as the importance of focusing on the big picture at the board level. He had no time or interest in "helping" me do my job,¹⁷ but he was available for counsel when I wanted his perspective. If you can find people like him, your board composition will be stellar.

Third, you may want to consider one or two members who have some educational expertise. People that understand curricula, assessment, and school law can offer valuable insights. Examples of people in this category include teachers and executives from other schools

¹⁷ In *The Seven Outs: Strategic Planning Made Easy for Charter Schools*, I liken boards "helping" executives with operational matters to when my daughters used to "help" my wife make cookies.

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(not in competition with your school for students), college professors and university instructors, and so on. Be careful, however, that such people don't end up working at odds with your school executive. The board should generally regard its executive as its preferred expert on educational matters.

Lastly, you want people who can work well together, which means that chemistry and fit are important, an often overlooked aspect. My experience with boards leads me to conclude that particular individuals may do well as part of some boards but not necessarily as part of other boards. I do not mean, however, only selecting people that simply agree with whatever the board says. Diversity of intellectual viewpoints is critical if your board intends to represent the owners because their viewpoints are intellectually diverse.

The bottom line is that you want knowledgeable, reliable people who have no personal agendas or no built-in conflicts of interest. You want people who will work well together, and that as a group have the talent necessary to oversee the school.



For Further Evaluation

Set aside 30 minutes in a board meeting to thoughtfully discuss the following questions:

1. What do your bylaws say about your board size and composition? Are the requirements in your bylaws consistent with the principles of sound governance?
2. If you have faculty members serving on the board, what policies do you have in place to ensure that proper roles and boundaries are observed? What protective mechanism do you have that allows the executive to broach a problem situation with a board member employee without fear of repercussion? How do the policies protect the executive if he or she needs to replace a board member employee?
3. How well does the size of your board work for your school?

Westlake Academy

Item #6
Board Recap /
Staff Direction

BOARD RECAP / STAFF DIRECTION

Westlake Academy

Item # 7 –
Workshop
Adjournment

Back up material has not
been provided for this item.

Westlake Academy

Item # 2 – Pledge of Allegiance

Texas Pledge:

*"Honor the Texas
flag; I pledge
allegiance to thee,
Texas, one state under
God, one and
indivisible."*

Westlake Academy

Item # 3 – Citizens' Presentations and recognitions

CITIZENS' PRESENTATIONS AND RECOGNITIONS: This is an opportunity for citizens to address the Board on any matter whether or not it is posted on the agenda. The Board cannot by law take action nor have any discussion or deliberations on any presentation made to the Board at this time concerning an item not listed on the agenda. Any item presented may be noticed on a future agenda for deliberation or action.

Westlake Academy

Item # 4 - Consent Agenda Items

CONSENT AGENDA: All items listed below are considered routine by the Board of Trustees and will be enacted with one motion. There will be no separate discussion of items unless a Board member or citizen so requests, in which event the item will be removed from the general order of business and considered in its normal sequence.

- a. Consider approval of **Resolution 10-21**, Amendment to the Student Athletic/Extra Curricular Program Academic Eligibility policy.

Westlake Academy

Memo

To: Honorable President and Members of the Board of Trustees
From: Amanda DeGan, Municipal Court and Special Projects Director
Subject: Regular Meeting of November 1, 2010
Date: October 18, 2010

ITEM

- Regular Consideration of an amendment to the Student Athletic/Extra Curricular Program Academic Eligibility policy for Westlake Academy.

WESTLAKE ACADEMY MISSION/ VISION STATEMENT

Westlake Academy is a nurturing, community-owned International Baccalaureate charter school whose mission is to achieve academic excellence and to develop life-long learners who become well-balanced, responsible global citizens.

WESTLAKE ACADEMY VALUES

- Academic Achievement
- PYP, MYP, DP (IB Continuum)
- Caring Environment
- Fiscal Stewardship
- Communication/Transparency
- Engaged Stakeholders
- Maximizing Each Child's Potential

BACKGROUND (including policy implications and options):

Currently, Westlake Academy participates in the Texas Christian Athletic Fellowship League (TCAF), which has an academic eligibility policy in their bylaws directing member organizations to implement and follow in order to be eligible for participation in their sports competitions.

In an effort to comply with the TCAF bylaws and allow for the advanced nature of the coursework at Westlake Academy, the Board approved a policy aimed at developing an action plan which would promote the IB Learner Profile traits of being *Principled and Balanced* while encouraging extracurricular/sports participation. The policy directed students to maintain a 70% passing rating in all classes in order to remain eligible for extracurricular/sports programs while at the same time providing for the *exemption of a maximum of one (1) course from consideration during each nine (9) week grading period*. The policy also asked staff to develop a method of tutoring and a supplemental course work program to help students who need additional

assistance to reach the minimum passing level. Many sports leagues, (UIL in particular) either provides for this type of allowance or exempts advanced courses from eligibility consideration due to the higher level of performance expected of students who attempt advanced classes.

Staff is proposing we amend our policy to comport with the TCAF bylaws as we did not seek approval for the academic waiver from the league and feel it is no longer necessary.

FUNDING

N/A

RECOMMENDATION

N/A

ATTACHMENTS:

Resolution

Policy

WESTLAKE ACADEMY

RESOLUTION NO. 10-21

A RESOLUTION OF THE WESTLAKE ACADEMY BOARD OF TRUSTEES AMENDING THE STUDENT ATHLETIC/EXTRA CURRICULAR PROGRAM ACADEMIC ELIGIBILITY POLICY.

WHEREAS, The Board of Trustees of Westlake Academy (the “Board”) finds that it is in the best interest of the Town of Westlake residents and persons interested in Westlake Academy (the “Academy”) that the Board shall establish policies governing academic eligibility as it relates to extracurricular programs and athletic participation; and

WHEREAS, The Academy participates in the sports league known as the Texas Christian Athletic Fellowship (TCAF) and is required as a member to abide by their bylaws specific to student eligibility; and

WHEREAS, the Westlake Academy Board of Trustees finds that the passage of this Resolution is in the best interests of the Academy.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF TRUSTEES OF THE WESTLAKE ACADEMY:

SECTION 1: That, all matters stated in the recitals hereinabove are found to be true and correct and are incorporated herein by reference as if copied in their entirety.

SECTION 2: The Board hereby adopts the amendment to the policy known as the *Student Athletic/Extra Curricular Program Academic Eligibility* relative designed to reflect the requirements of the Texas Christian Athletic Fellowship attached to this resolution as ***Exhibit “A”***.

SECTION 3: If any portion of this Resolution shall, for any reason, be declared invalid by any court of competent jurisdiction, such invalidity shall not affect the remaining provisions hereof and the Board hereby determines that it would have adopted this Resolution without the invalid provision.

SECTION 4: That this resolution shall become effective from and after its date of passage.

PASSED AND APPROVED BY THE BOARD OF TRUSTEES OF WESTLAKE ACADEMY, A CHARTER SCHOOL OF THE STATE OF TEXAS, ON THE 1ST DAY OF NOVEMBER 2010.

Laura Wheat, President

ATTEST:

Kelly Edwards, Board Secretary

Thomas E. Brymer, Superintendent

APPROVED AS TO FORM:

L. Stanton Lowry, School Attorney

Exhibit "A"

**TOWN OF WESTLAKE
WESTLAKE ACADEMY
BOARD OF TRUSTEES POLICY**

Policy No. 09-20:

Date Board Adopted: December 7, 2009

Date Board Amended: October 25, 2010

Effective Date: November 1, 2010

Policy Name: Student Athletic/Extra Curricular Program Academic Eligibility

Policy Category: Student Achievement

Policy Goal: Uniform Academic Criteria and Guidelines for Determining Student Participation in Westlake Academy's Athletic/Extra-Curricular Programs

Policy Description:

Westlake Academy offers the rigorous International Baccalaureate Organization (IBO) course work as the standard curriculum for students in grades K-12 and values the traits found in the IB Learner profile. In particular, the traits of being *Principled* and *Balanced* will be emphasized in our sports and extra-curricular programs. The Academy will offer the students the opportunity to participate in these types of activities in an environment that fosters fairness, justice and respect for the dignity of the individual, groups and communities and also promotes a greater understanding of the importance of intellectual, physical and emotional balance.

Currently, Westlake Academy participates in the Texas Christian Athletic Fellowship (TCAF) League for competitive sports and as such, athletes, teams and coaches must abide by their policies and procedures in order to remain eligible and participate in the team or individual sports program.

Staff is directed to periodically review the League's requirements as it pertains to eligibility and update the Parent/Student Handbook in order to inform the students of the necessary academic performance levels required to participate each year.

Westlake Academy

Item #5
Board Recap /
Staff Direction

BOARD RECAP / STAFF DIRECTION

Westlake Academy

Item #6 Board Calendar

BOARD CALENDAR

- Secondary Boundary Parents Meetings (2 remaining)
 - November 2, 2010; 7 pm; Home of Richard & Kimberly DePaolo
 - November 10, 2010; 7 pm; Home of Jim & Christine Smith
- Westlake Academy Thanksgiving Holiday
November 22-26, 2010
- Town Offices Closed
November 25-26, 2010
- Texas Charter Schools Association Conference, San Antonio
November 29-December 1, 2010 (contact Ben)
- Community Tree Lighting
November 30, 2010; 6:30 pm; Westlake Academy campus
- Board of Trustees Meeting
December 13, 2010
- Annual Westlake Employee Award and Christmas Dinner
December 15, 2010; 6:30 pm; Marriott Solana
- Westlake Academy Winter Holiday
December 20 – 31, 2010
- Town Offices Closed
December 24th, 27th and 31st, 2010

Westlake Academy

Item # 7 – Future Agenda Items

FUTURE AGENDA ITEMS: Any Board member may request at a workshop and / or Board meeting, under “Future Agenda Item Requests”, an agenda item for a future Board meeting. The Board member making the request will contact the CEO with the requested item and the CEO will list it on the agenda. At the meeting, the requesting Board member will explain the item, the need for Board discussion of the item, the item’s relationship to the Board’s strategic priorities, and the amount of estimated staff time necessary to prepare for Board discussion. If the requesting Board member receives a second, the CEO will place the item on the Board agenda calendar allowing for adequate time for staff preparation on the agenda item.

- **None**

Westlake Academy

Item # 8 – Adjournment

Back up material has not
been provided for this item.
