

Policy Tools for Effective Governance

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Agenda

- The importance of the board's role as local policymakers
- Overview of CSBA's *Board Policy Development Toolkit*
- Key principles from framework
- Using the Toolkit
- Existing CSBA policy resources
- Q & A



Housekeeping

- ▶ Please use the Q&A feature to submit your questions. This is located on the ribbon below the speaker. The chat feature has been turned off.



- ▶ Your questions will be answered either in the Q&A feature in writing or live by our presenters
- ▶ All attendees will receive a link to this video recording as well as resources in a follow up email after the webinar.



The Importance of the Board in Local Policy



Board Members are Local Policy Makers

- Major levers as a board member:
 - Adopting and monitoring budgets
 - Hiring and evaluating the superintendent
 - Approving Local Control and Accountability Plans
 - Monitoring district performance and student achievement
 - **Adopting local policies**



A Governance Team's Key Roles

The Board

- Establishes the vision and governance framework through policy
- Sets expectations, priorities, and accountability
- Focuses on governance—not day-to-day operations
- Reviews and updates policy to address changing needs

The Superintendent

- Implements board policy through leadership and administration
- Translates policy into programs, procedures, and practice
- Leads operations while keeping the board informed
- Provides expertise and recommendations for policy development



A Governance Team's Key Roles cont.

Policy Administrator(s)

- Alerts staff, superintendent and board of policy updates or changes to law
- Coordinates the review
- Ensures policies needing revision are brought to the board for discussion and adoption



Together, the governance team uses policy to...



Create a shared understanding of roles and responsibilities.



Ensure consistent, transparent, and legally compliant decision-making.



Align governance with district goals and community expectations.



Support continuous improvement and organizational effectiveness.



Keep the focus on student success rather than operational details.



CSBA's Board Policy Development Toolkit



“Develop robust tools and guidance to accompany sample policies and that support member boards in adopting, reviewing, and amending policies to support educational equity at the local level.”

CSBA Strategic Priority 1, Goal 3



What's in the Policy Toolkit?

**Policy
Framework &
Framework 101**

**Individual
Board Member
Reflection**

**Board Policy
Process
Evaluation**

**Quick
Reference
Guide**



Note: The toolkit is available to all district and county board members at no cost.



Policy Toolkit: The Policy Framework & Framework 101

- Understanding board policies and what they do
- The board role in policy adoption
- What constitutes strong school board policies
- Best practices for review and adoption
- The *Policy Framework 101* provides an abbreviated introduction to the comprehensive *Policy Framework*



POLICY TOOLKIT

2. CSBA's Policy Framework

This Policy Framework supports boards in developing sound and effective policies that benefit all students. A sound policy framework is the first step in building shared vocabulary and understanding, resulting in a more informed and cohesive governance team. This framework will help board members, no matter their previous expertise and experience, be able to recognize reliable source material and enhance the ability of members to make the most of vetted resources such as those offered by the California School Boards Association (CSBA).

KEY TAKEAWAYS

Importance of setting policy culture and practices — Effective policy governance by local educational agencies (LEAs) is crucial for ensuring that schools operate efficiently and equitably, fostering community trust, and providing high-quality teaching and learning environments. Strong policies and culture around policy development can protect the LEA from legal and financial challenges.

Need for comprehensive and inclusive policy development — Policy encompasses the LEA's accountability standards and should be developed through a cooperative effort involving the board, staff, and cross-section of community members. Including different perspectives ensures policies reflect the needs of the community, are well implemented, and can become part of the day-to-day culture of the LEA.

Necessity of ongoing policy evaluation and adaptation — Policies must be regularly reviewed and updated to remain effective and compliant with state and federal laws. Continuous feedback from the community and system-



Policy Framework Key Principles

- Reflect local priorities
- Ensure compliant with state and federal law
- Anticipate implementation needs
- Consider instructional impact (when relevant)
- Consider resources needed
- Incorporate community engagement
- Consider the impact this will have on different student groups and staff (equity)
- Use data to define success
- Consider other impacts (unintended consequences)



Individual Board Member Reflection

- Self-assessment tool to help board members reflect on their policy literacy and local policy development practices
- Designed for individual reflection prior to the *Board Policy Process Evaluation*; reusable annually or as needed



POLICY TOOLKIT

3. Individual Board Member Reflection

This individual reflection tool aims to help board members conduct a self-assessment of their policy literacy and understanding of their local educational agency's (LEA) current policy development practices. Prompts are meant to highlight areas of strength and areas for growth and are aligned with the CSBA Policy Framework and other CSBA resources. This tool should be used before the board completes the CSBA Board Policy Process Evaluation and can be reused annually or as needed to help board members reflect and refine their skills and knowledge.

MY POLICY PRACTICES

1) I feel _____ in my understanding of the policy development and review process (i.e. when policies are needed, how my LEA reviews policy updates).

- ☐ Not confident at all
- ☐ Minimally confident
- ☐ Fairly confident
- ☐ Very confident



Board Policy Process Evaluation Tool

- Supports both individual board members and the team in building a strong policy culture
- Provides a structured starting point for internal conversations about local policy practices
- Based on the key principles of policy adoption in *The Policy Framework*



POLICY TOOLKIT

4. CSBA's Policy Process Evaluation Tool

The Board Policy Process Evaluation Tool is designed to be used by governance teams to thoroughly weigh and score a local educational agency's (LEA) policy development and implementation practices based on a set of accepted standards, principles, and/or priorities.

This document is meant to help each individual board member and the governance team as a whole understand the practices that create a strong policy culture. It provides a jumping off point for internal board discussions about local policy practices.

WHEN SHOULD THIS EVALUATION BE USED?

Ideally, boards should evaluate their policy practices annually to determine how they can improve and where there are already strengths that can be built upon. The goal is to help the board create a culture that supports effective policy development. This can take some time, and periodic reflections are key.

While an annual evaluation might not be feasible, this tool can also help the board improve LEA governance by examining its policy practices at key moments. For example, boards may use it at their annual organizational meeting to set the tone for the policy practices for new and continuing board members, following a training such as CSBA's Good Beginnings workshop, or when the board has hired a new superintendent. They might choose to do it in cadence with their Local Control and Accountability Plan (LCAP) reporting requirements or another planning meeting. If the board is embarking on a full revamping of the LEA's policy manual through a CSBA-facilitated Policy Development Workshop, it is recommended that the board do this evaluation before adoption of the newly drafted policy manual, to understand how the manual will stay compliant and relevant moving forward.

HOW TO USE THIS POLICY EVALUATION

This policy evaluation tool should be used by governance teams (board and superintendent) that wish to ensure that their LEA values, mission, and policy goals are aligned with their policy practices.

Prior to a group discussion, individual board members should complete the evaluation separately. The governance team should then convene to discuss their individual results to identify where there is agreement on the LEA's current policy practices. This is important for refining norms and surfacing potential areas of disconnect, so the board can set common goals around the LEA's policy practices. Additionally, the conversation should include alignment of norms and practices related to the superintendent and LEA staff role. Each LEA must determine how to best adapt these practices to their local context and community, although some recommendations are included in the Policy Framework and other documents that accompany this tool. *Note:* While the tool may be used for self-study to help each board member reflect on local practices, when possible, the responses by the governance team can be used to improve and align policy development processes as a whole.



Quick Reference Guide

5. Policy Principles: Quick Reference Guide

Evaluation and policy review are done at almost every board meeting. Boards can use this quick review list to see if the policy aligns with the key principles for strong policy practices. Board members are encouraged to review each of the principles during the discussion to ensure that the policy is vetted thoroughly before adoption.

Note: Not every policy review requires extensive discussion. The following questions are included to support more substantive review when appropriate.

Has the board discussion considered:

Policy Principle	Criteria	Discussion Questions	Notes
Local Priorities	☐ The proposed policy aligns with local priorities.	▶ Does this policy reflect our local priorities and goals? ▶ Are the LEA's values reflected in the policy? ▶ Have we confirmed this policy is needed within our local context?	
Compliance	☐ The proposed policy complies with the law, relevant regulations, and other local policies.	▶ Does this policy comply with the law? ▶ Is it consistent with our other policies and practices?	

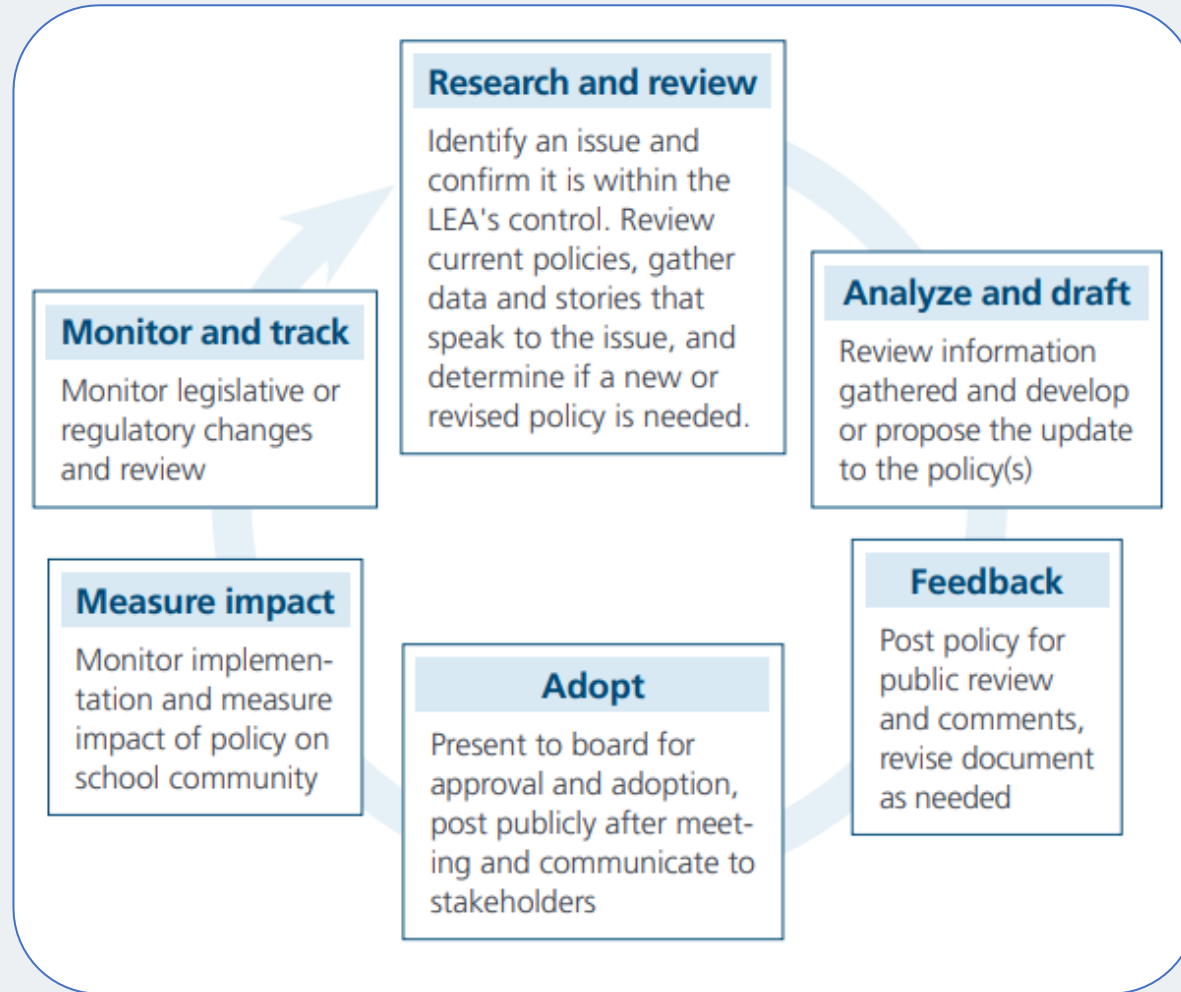
- Review tool for board members to refer to during substantive policy adoption discussions
- Rubric to check alignment with key components of effective policy review and adoption
- Based on the principles from the *Policy Framework*



Using the Toolkit



The Policy Life Cycle



CSBA Sample Policy Update Packet Schedule

FEBRUARY

MAY

AUGUST

NOVEMBER

SPECIAL
UPDATES
PACKETS AS
NECESSARY



The Toolkit Can be Used Multiple Ways

- Independent study of the framework and self-reflection tool
 - New board members – as a foundation for effective governance
 - Experienced board members – as a check-in to revisit key principles and refine practices
- Board study sessions beginning with the framework, self-assessment, and group process evaluation
 - When new board members or superintendents warrant revisiting group norms
 - When the governance team feels local practices could be improved
- Using the quick reference guide as part of substantive policy discussions throughout the year



Incorporating the Quick Reference Guide into Policy Discussions

This is a checklist that can help evaluate whether a proposed policy or revision aligns with the key principles.

- Identifies criteria for each principle
- Includes key discussion questions for each principle and a section to documents notes

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Compliance	☐ The proposed policy complies with the law, relevant regulations, and other local policies.	▶ Does this policy comply with the law? ▶ Is it consistent with our other policies and practices?	



Incorporate the Quick Reference Guide into Policy Discussions

The Quick Reference Guide can be used:

- In a board meeting to address any gaps in recommended revisions
- To identify key questions for staff in advance of policy discussions



Policy Principle	Criteria	Discussion Questions	Notes
Implementation	☐ There is a clear plan for implementing the proposed policy.	▶ How will this policy be implemented? ▶ Who needs to be included in the policy implementation discussion? ▶ Are there current practices that should change in response to this new policy?	
Instructional (if applicable)	☐ Potential instructional impacts have been considered.	▶ Does the policy have an impact on our instruction? ▶ Is the policy aligned with our other instructional goals?	
Impact	☐ Other potential impacts have been considered, including unintended consequences.	▶ What is the intended goal of this policy? ▶ Is there evidence and research that supports our impact goals? ▶ What unintended consequences might result from adopting this policy?	
Resources	☐ Necessary resources for successful implementation will be in place.	▶ What resources are necessary to implement this policy?	



The Policy Subcommittee

Subcommittees is a smaller group focused on the development and revision of policy. It can consist of various community stakeholders and may include:

- LEA staff leadership
- LEA employees
- Community members
- Students
- Board members



Policy Subcommittee Development

1

Identify a small group willing to review policy outside of the main meeting and meet regularly (i.e., four times a year).

2

Use the toolkit to facilitate diving in by reviewing data, gathering feedback, and making recommendations for the board's action.

3

Present recommended policies and revisions to the board in a public meeting to allow for community input.

4

Monitor impact and present new data to the full board, as necessary.

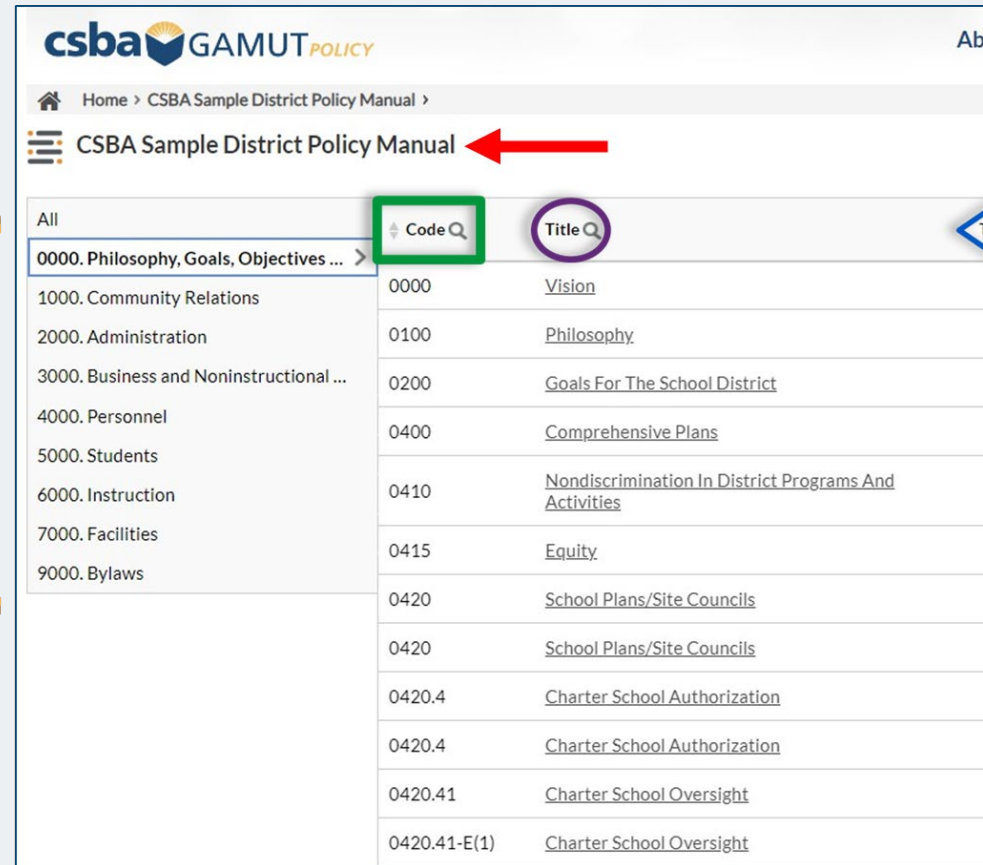


CSBA's Other Policy

Resources

CSBA's Existing Policy Resources

- CSBA Sample Policy Manual (GAMUT Policy)
- GAMUT Policy Plus
- Quarterly Policy Update Webinars
- CSBA Masters In Governance
 - Course 2: Policy & Judicial Review | Student Learning & Achievement



The screenshot displays the CSBA GAMUT Policy website. The header includes the CSBA logo and the text "GAMUT POLICY". Below the header, a navigation bar shows "Home > CSBA Sample District Policy Manual >". A red arrow points to the "CSBA Sample District Policy Manual" link. A large orange bracket is positioned to the left of the table. The table has two columns: "Code" and "Title". The "Code" column is highlighted with a green box, and the "Title" column is highlighted with a purple box. The table lists various policy topics, including "0000. Philosophy, Goals, Objectives ...", "1000. Community Relations", "2000. Administration", "3000. Business and Noninstructional ...", "4000. Personnel", "5000. Students", "6000. Instruction", "7000. Facilities", and "9000. Bylaws".

Code	Title
0000. Philosophy, Goals, Objectives ...	
0000	Vision
0100	Philosophy
0200	Goals For The School District
0400	Comprehensive Plans
0410	Nondiscrimination In District Programs And Activities
0415	Equity
0420	School Plans/Site Councils
0420	School Plans/Site Councils
0420.4	Charter School Authorization
0420.4	Charter School Authorization
0420.41	Charter School Oversight
0420.41-E(1)	Charter School Oversight



Policy Services

Policy Development Workshops

Develop a robust, up-to-date policy manual that addresses key issues and complies with state and federal mandates.

Policy Manual Review

Engage CSBA to help determine the state of your board's policies. A CSBA consultant will compare your current policies with CSBA samples to identify individual policies that may need to be updated or added to your manual. The consultant will provide a report of how your policies compare to the CSBA samples and describe what changes in the law have occurred since your last revisions.



Q & A



Key take-aways

- Policy making is a key lever of effective governance.
- CSBA's free toolkit offers multiple ways for board members and governance teams to strengthen local policy review and adoption
- Access the toolkit at csba.org/policytoolkit
- Know your district's point person/people for policy processing
- Webinar: An Inside Look at the August Policy Packet (August 26, 2026, 11am). Register [here](#).
- Next Masters in Governance Course on Policy and Judicial Review (COEs: August 14, 2026; Districts: September 22, 2026)



Contact Us

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Thank you



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