

Leaving the Board Stronger Than You Found It

Guide for Effective School Board Transition

Boards cannot control who is elected next. But they can shape what the next Board inherits.

Every Board term ends with transition. New Trustees arrive with fresh ideas and priorities, but they also inherit decisions, initiatives, and relationships shaped by the previous Board. When this context is not captured, Boards often spend months rediscovering information that once existed around the table. Intentional transition conversations help the next Board:

- Understand the context behind major decisions
- Continue initiatives already underway
- Avoid repeating work that has already been done
- Begin governing with greater clarity and momentum

A Governance Responsibility

Responsible Boards take time near the end of their term to reflect on their work and document key insights for the next Board. This typically requires a focused working session where Trustees step back from regular meeting business and examine the broader arc of their term.

The goal is not to prescribe the future. The goal is to ensure the next Board understands the context in which it begins its work.

Discussion Prompts for Boards

1. Reflect on the Board's term

- What major changes occurred during this Board's tenure?
- What challenges shaped the work of the division?
- What decisions significantly influenced the direction of the division?

2. Identify work still underway

- Which initiatives are not yet complete?
- What work will require continued Board attention?
- What partnerships, commitments, or relationships should the next Board understand?

3. Capture important context

- Why were these initiatives important?
- What progress has already been made?
- What would a new Trustee need to understand to continue this work?

4. Discuss Interim Priorities

While the next Board will establish its own strategic direction, it can be helpful to identify areas where continuity may matter. Boards should identify:

- The initiatives that they recommend be continued during the next term.
- The risks that exist if certain work loses momentum.
- Those issues that may require early attention from the incoming Board.

Create a Board Transition Briefing

The outcome of this conversation should be a Board Transition Briefing package that provides incoming Trustees with key context.

Draft Index for Board Transition Briefing

1. Key changes between 2023 – 2026
2. Major decisions and why they mattered
3. Initiatives still underway
4. Context the next Board should understand
5. Interim priorities to consider

Timing Matters

The most practical time to undertake this work is before the election period begins, while current Trustees are still actively engaged in the Board's work.

Capturing this knowledge before transition can significantly reduce the time it takes for the next Board to orient itself and begin governing effectively.

Support for Boards

Some Boards choose to have this type of session independently facilitated to ensure the conversation remains focused, each Trustee is engaged, and key insights are captured and documented clearly.

If your Board is interested in facilitation support, please reach out for a conversation about the approach that would be right for you.

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