

Summer Governance Reset

7 Decisions Charter Boards Should Make Before the New School Year

Summer is one of the few times in the year when a charter school board can step back, assess what is working, and get aligned before the board calendar fills up again. A strong school year rarely starts in August. It starts in the summer, when the board has enough space to confirm priorities, lock in key dates, clarify committee ownership, and make sure the governance infrastructure is ready to support the work ahead.

Charter school boards carry responsibility that extends far beyond meetings. The work includes academic performance, financial oversight, legal compliance, CEO stability, and long-term organizational strength. A strong annual governance calendar typically includes regular board meetings, committee meetings aligned to major reporting cycles, an annual retreat, CEO evaluation checkpoints, and key charter or authorizer deadlines.

Without that reset, important work tends to stay scattered across inboxes, spreadsheets, old minutes, and individual memory. Boards that reset their systems and priorities before the year starts are better positioned to lead with clarity once the pace picks up. This guide walks through seven decisions charter boards should make over the summer so the new school year starts with clearer priorities, stronger accountability, and fewer governance surprises.

The 7 Decisions

1. What are the board's top priorities for the coming year?

Before the new school year begins, the board should agree on a short list of priorities that will shape its work. Those priorities should reflect the school's strategic plan, current performance, and the major decisions the board expects to face over the next 12 months.

Summer is the right time to ask:

- What must this board help move forward this year?
- Which issues belong at the board level, and which belong to management?
- What needs to stay visible from the first meeting forward?

2. What does the annual governance calendar need to include?

A board calendar should do more than list meeting dates. It should map the full year of governance work, including retreats, committee meetings, budget review, evaluation windows, development activities, and key reporting or renewal milestones. Strong governance runs on a predictable calendar that is understood by both the board and the leadership team.

Summer is the time to lock in:

- Full board meeting cadence
- Committee meeting cadence
- Retreat date and purpose
- Budget, audit, and compliance review points
- CEO support and evaluation timing
- Major authorizer and reporting deadlines

3. Which committee owns what this year?

Committee work is where much of the board's real follow-through happens. In many charter schools, the Governance or Board Development Committee plans assessments and retreat agendas, the Finance and Audit Committee tracks budget and audit work, and the CEO Support and Evaluation Committee manages the year-round leader evaluation process.

Summer is the time to decide:

- Which committees are active this year
- Which committee chairs are ready to lead
- What each committee is responsible for producing
- What should come back to the full board, and when

4. How will progress on board goals be tracked between meetings?

Goals that only show up at retreats rarely drive year-round action. Summer planning should include a simple decision about how progress will be recorded, reviewed, and revisited. Effective governance systems connect priorities to timelines, responsible parties, and meeting agendas so follow-through stays visible over time.

Questions to answer now:

- Where will board and committee goals live?
- Who updates progress?
- How often will the board revisit them?
- What happens when a goal starts to drift?

5. What is the board's plan for CEO support and evaluation?

The school leader is the board's one direct report, and research cited by the National Charter School Resource Center notes that a consistent annual evaluation process is associated with a stronger board-leader partnership and reduced leadership churn. New York State governance guidance likewise emphasizes evaluating the school leader at least annually as a key driver of performance oversight.

Summer is the best time to confirm:

- Who owns the process
- What criteria will be used
- What evidence will be reviewed
- When informal check-ins and formal evaluation milestones will happen

6. What needs to be cleaned up for compliance and recordkeeping?

Boards are often surprised by how much time it takes to assemble materials retroactively when an authorizer, auditor, or regulator asks for them. The National Charter School Resource Center notes that collecting minutes, contracts, and records after the fact is time-consuming and frustrating, and can leave a board exposed on compliance.

Before the year starts, the board should make sure:

- Minutes and packets are complete and organized
- Policies and bylaws are current
- Public posting processes are clear
- Meeting records are stored in one consistent location
- New trustees can find what they need without chasing it down

7. What does board composition look like over the next 12 to 24 months?

Summer is also a planning window for board continuity. Recruiting, succession, term limits, and onboarding are easier to manage when they are visible before seats open up. A current picture of board composition, terms, and skill gaps supports more intentional recruiting and smoother transitions.

Boards should decide:

- Which terms are ending soon
- What skills or perspectives are missing
- Whether committee leadership is sustainable
- How new members will be onboarded
- What leadership transitions need an early plan

Start your summer reset

The new school year will move quickly. Boards that use the summer to reset their priorities, calendar, committee structure, evaluation process, and records are more likely to stay focused on governance instead of reacting to logistics.

If your board is heading into the year with plans spread across tools, documents, and inboxes, now is the right time to simplify the work and create a more repeatable system. [Board on Track](#) is built specifically for charter school boards, bringing meetings, compliance, goals, CEO evaluation, recruiting, and governance resources into one place. See how Board on Track supports this work, [schedule a discovery call](#) today!

