

Board & Administrator

FOR SCHOOL BOARD MEMBERS

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Editor: Jeff Stratton

Should school boards manage? Yes, themselves

Boards should be comfortable “managing” in two areas: They should manage but not micro-manage their superintendent, and the board should manage itself. That second point may be most critical to the district, according to John Almond and Lloyd Wamhof, member assistance advocates for the Association of California School Administrators.

“In our work, we see some boards that accomplish both of these functions very well,” Almond said. “Our observation is, however, that a significant number of school boards have not set any guidelines for managing themselves.”

For evidence to back up this statement, look no further than the number of boards that are always at odds within their own ranks, Almond said. “Such boards have become divided on certain core issues and, in some cases, recall after recall of board members has created dysfunction within the district,” he said.

Regular and counterproductive superintendent turnover due to board dysfunction is another sign that boards are not adept at managing themselves, Wamhof said. Here are several suggestions from Wamhof and Almond to help a board manage itself professionally, successfully, and in a way that allows the board to do the job trustees were elected to do:

1. Agree on written norms/protocols that outline how the board will manage itself and conduct business efficiently at its meetings. The norms/protocols should be laid out in a short list that is agreed to by all members. (See an example of board norms/protocols on page 2.)

2. Restate board norms/protocols at the beginning of meetings and board workshops.

3. Reach agreement as a board on what a successful school district looks like. “Part of this process is examining and visiting successful districts and then deciding on what best practices board members can implement in their own district,” Wamhof said.

4. Rely on the superintendent to conduct the daily business of the district.

5. Be willing to hire a board coach to assist in establishing board norms/protocols and to utilize the coach in maintaining a positive relationship with the superintendent.

6. Be willing to censure fellow board members who continually disrupt the smooth running of the district and don’t observe the board’s own norms/protocols and agreements on how to run the district.

When the board is unprofessional, breaking the cycle of poor board management isn’t simple, and there isn’t a quick fix pill to swallow to change the behavior of disruptive board members who get themselves elected based on a negative personal agenda, Wamhof said.

Can a cycle of negativity be broken? Yes, Wamhof said.

For this to occur, however, there should be a process in place and board members must be willing to discipline themselves. That starts with norms and protocols.

For information, www.acsa.org; 559-905-2057. ■

Board norms/protocols help board manage itself

John Almond and Lloyd Wamhof, member assistance advocates of the Association of California School Administrators, suggest the following board norms and protocols for school boards to help them “manage” themselves professionally:

We agree:

- To respect differences of opinions in making decisions for the district.
- To follow best practices in managing the superintendent and the management of the board itself.

- To stay on task when conducting business for the district including while at board meetings.
- To never surprise the superintendent or each other when conducting official business of the district.
- To read these norms at the beginning of each board meeting and at board workshops as a reminder of how to conduct our meetings.
- To continually self-check to determine if we are following our norms when conducting district business. ■

Advocacy never more important to public schools than today

If school board members won't speak to their elected officials about support for public education, who in your community will?

The Kansas Association of School Boards, in its “10 rules of effective lobbying” offers these tips to help school board members when they reach out to their elected officials.

- Prioritize. “When everything is important, nothing is important,” KASB States. “This applies to how you spend your time as well as what you communicate to your legislators. They probably will not support you on every issue. Let them know what is the most important.”

- You need friends. “Shore up lobbying allies from your community to demonstrate broad support,” KASB advises.

- Manners, manners, manners. “Always be positive and courteous,” KASB states. “In politics, no permanent friends, no permanent enemies, but always politeness.”

For information, https://www.kasb.org/wcm/Advocacy_Services/Advocacy_Tips/10_Rules_of_Effective_Lobbying/wcm/_AdvS/Advocacy_Tips/10_Rules_of_Effective_Lobbying.aspx?hkey=fc5eead5-95a9-4a6f-a781-39e982263cab. ■

Participate in new member orientation with these 3 ideas

Here are three ways all board members can play a role in the orientation of a school board trustee, thereby ensuring that your newest teammate has a smooth start to the job:

1. Policy commitment. The board should have a policy in place stating that new board member orientation is required and listing who participates in the orientation, what orientation consists of, and when it should occur.

2. A belief that ongoing board education is vital. The board expects school staff to engage in professional development; it should expect the same of itself. Take time at board meetings to discuss

how to be a better board, how to improve policy, and how to ensure that thorough discussions take place so that all board members are up to speed on the complex issues you face.

3. Treat staff as a valuable resource. This starts with your relationship to the superintendent. The board should understand that he wants to answer board questions, whether they are from veterans or newbies. Expect the superintendent to reach out to new board members to check their comfort level with board work and maybe call on board veterans to assist with this. ■

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Agenda construction: Eliminate what's unimportant

When board members don't understand priorities at a board meeting, the meeting itself can become very unproductive. That's because board members will use meeting time to discuss the "unimportant," rather than the district's pressing business, said attorney and long-serving board member Gary R. Brochu. The challenge for the board president and superintendent is to craft a board meeting agenda that focuses the board's attention on important issues and "crowds out the nonsense," Brochu said. In Brochu's early experience as a board member, he hated wasted time on board discussions about approval of a class field trip that the district had been taking for 20 years.

The meeting should be the time when the board discusses performance, results with data, and the superintendent's reports, and not which class is taking a field trip and where, Brochu said.

If setting the meeting agenda is important to district operations and the school's success in educating children, there should be a proven process in place to develop the plan of work for the meeting.

The agenda the superintendent and board president put together should not only result in a smoothly run board meeting that accomplishes important work, but helps ensure good communication with the board.

Here is a process for creating the meeting agenda:

1. Start agenda creation well in advance. Depending on your district's size and complexity, creation of the agenda may begin more than one week before the regularly scheduled board meeting. For instance, the superintendent may need to meet with his or her staff to review a tentative agenda and gather their input.
2. Gather board input. The superintendent, board president, and sometimes the board vice-president meet to review the agenda.
3. Following board leadership approval of the agenda, the superintendent should make additions/changes based on their input. Then, he will submit it to the board leadership for final review.
4. Post the agenda to the district's board portal and make arrangements if necessary for delivery to board members. This should be done in advance to give board members plenty of time for agenda and background materials review as they make their final preparations for the meeting.
5. Don't forget to think long-term about the district's meeting agenda. It's a good idea to anticipate any issues that will create public debate and possible controversy. This allows the board president and superintendent to plan and approve an approach to working through a difficult issue. ■

'Hash it out' when role disagreement arises

A terrific technique for the board and superintendent to mutually agree upon roles is to "hash things out" when views differ. That's the advice from BoardEffect:

"One way to gain full board agreement is to start a discussion

by asking board members to say a few words about how they perceive their role on the board. These discussions can form the basis for a general discussion about the role of the whole board."

For information, www.boardeffect.com. ■

Protocols, process necessary for effective meetings

For an effective board meeting to occur, the board needs an agenda that keeps the board focused on high-priority items to the district.

In most districts, the superintendent and board president meet roughly a week before an upcoming board meeting to work out the agenda. This meeting allows the administrator and president to ensure they are both on the same page as far as the agenda, and to be certain that the agenda items are pertinent and a high-priority for the district.

Often the superintendent and president will get together the day of the board meeting just to ensure that nothing last-minute has come up. At that point it becomes the president's job to keep the board focused on the meeting's business.

This is one of the president's key responsibilities -- presiding at meetings. He or she should keep the meeting moving along, on task, and focused on the issues laid out in the meeting agenda.

Governance education over the long term also helps to keep the board focused on important work at its meetings. Board members who have received education understand that their job at the meeting is not to wander off into the weeds or to create their own agenda for board meeting.

To have your issues placed on the meeting agenda, a board member should follow certain board-approved protocols. Here are some examples.

Protocols for effective school board meetings:

1. Place requests to include your items on the meeting agenda in the manner outlined in board policy.
2. Review and approval of the board meeting agenda by the board leadership and superintendent should take place at least one week before the scheduled meeting. The meeting agenda should be in front of board members to allow plenty of time to prepare.
3. The board should use a consent agenda to approve items not requiring discussion by the board. This facilitates effective use of meeting time by disposing of a group of routine agenda items with one motion and vote.
4. Any board member may request that items be placed on the agenda in the manner specified in board policy. Any board member may ask that an item be pulled from the consent agenda and discussed by the full board at its meeting. As a courtesy, notify the superintendent and president in advance of the meeting to discuss the consent item and ensure "no surprises." ■

Board sets direction, superintendent whacks away the weeds

If a school board suddenly found itself in the midst of a jungle, what would it do? Would trustees pull out machetes and start clearing a path through the vines, or would they rely on their guide to do this kind of work after the board had strategized the best way to get to its destination?

The board needs to make plans for the district about where it wants to go and support the superintendent as he works to achieve the board's vision. The board's job requires it to let the superintendent hack away the vines and weeds, after the board determines the best destination.

Here are some strategies the board and superintendent can use to ensure each party is doing what it is best suited for:

1. Have a conversation (board and superintendent), or bring in a consultant, to talk about roles. During these talks, Betsy Miller-Jones, former executive director of the

Oregon School Boards Association, advises reviewing the district's policy on roles and talking about why they are in place and why it is important they be followed. "It's important to understand the consequences to the district when there is a 'confusion of roles,'" she said.

2. Develop an operating agreement that spells out who does what in the major governance and operating areas. "The process of developing the agreement involves talking directly about who does what and why, which goes a long way to clear the air and set appropriate expectations," Miller-Jones said.

3. Make sure the school district has policies in place that clearly define roles and are supported by the written operating agreement.

4. Review operating agreements and policies annually and make it part of a new board member orientation program. ■