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The School Board Fieldbook: Leading With Vision

Study Guide

This study guide is intended to assist you in the reading of and reflection on *The School Board Fieldbook* by Mark Van Clay and Perry Soldwedel. The guide can be used by individuals or small groups to identify key points, raise questions for consideration, and identify steps that might be taken to improve the school board's ability to lead with vision. The guide is arranged by chapters, enabling readers to either work their way through the entire book or focus on the specific topic that is addressed in a particular chapter.

We thank you for your interest in this book, and we hope that this guide proves to be a useful tool to ensure that the strategic, tactical, and operational roles and responsibilities in your school or district are clear and collaborative.

Chapter 1

The Learning Curve: What Makes Serving on a Board Unique?

Chapter 1 defines seventeen challenges that school board members face. These challenges are summarized on pages 10–11. The authors suggest two ways to categorize these challenges for group discussion.

In the first method, the challenges can be sorted into the following categories:

- a) *Personal accommodations*—Accommodations to which each individual board member must adjust (the first two and the last two bullets)
- b) *Systems realities*—“Givens” about school systems that board behaviors must accommodate (the fifth through eighth bullets)
- c) *Board realities*—“Givens” for which each board will have to account when making strategic decisions to drive the organization forward (the ninth through fifteenth bullets)

In the second method, the seventeen challenges can be sorted according to the three Big Ideas of a professional learning community (as defined by Richard DuFour, Rebecca DuFour, and Robert Eaker) to answer critical questions:

- d) *Focus on learning*—What does a board member have to know in order to perform his or her role at a high level?

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- e) *Focus on collaboration*—How will a board member recognize when and how he or she must work with others to achieve the board’s vision, and why is such collaboration necessary?
- f) *Focus on results*—What comprises school system accountability, and how does the board determine what data are appropriate and effective in making the case for accountability?
1. Do you agree with how a, b, and c are sorted? If not, what would you change, and why?
 2. How would you sort d, e, and f? How would you justify your choices?
 3. Would you sort these seventeen challenges in a completely different way using different categorical headings? If so, how would you do so, and why?
 4. Which of the seventeen challenges do you feel you can easily accommodate in your board role? Which will be difficult to accommodate? Which are confusing?
 5. Discuss with other board members what each of these seventeen challenges mean, and assess your strengths and weaknesses as a board relative to the challenges.
 6. Pick the top three or four challenges that most need your board’s attention. What could be your next steps in addressing these priority challenges?

Chapter 2

Three Roles Essential to Every School System

Chapter 2 defines the board's role and separates the functions of that role from other organizational roles.

The authors state that role perspectives are defined through expertise, time, and access, and argue that actions that deviate from one's proper role result in micromanagement.

Examine Table 2-1: Strategic, Tactical, and Operational Definitions and Table 2-2:

Strategic, Tactical, and Operational Roles, then answer the following questions.

1. What are one or two improvement priorities that have been identified for your school district? How were those priorities identified? What was the board's role in addressing those priorities? What was the administrative role? What was the staff role?
2. How do expertise, time, and access shape these roles? How can a board determine if changes are actually occurring in the classroom without micromanaging? What self-imposed guidelines would your board consider to avoid micromanaging?

The authors describe the differences between a school system and a system of schools.

Review Table 2-3: School System Versus System of Schools, and respond to the following questions.

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3. In your school system, how do you define what *everyone* needs to do well together? What are common expectations for all schools? How are they communicated to all staff? How do they align with performance expectations at tactical and operational levels? Discuss the importance of teaching to and having learning focused upon the common expectations. Discuss how such teaching and learning need to be both systematic and systemic.

The authors present a five-step decision-making process that aligns the three roles in making, implementing, and assessing school district decisions.

4. Why is a board charge critical to the decision-making process?
5. What do you think are essential components of a board charge that provides both strategic clarity and guidance while avoiding assigning tactics? Why should action plans be designed by staff rather than boards?
6. Do you think the decision-making process provided by the authors allows for sufficient board authority? Why or why not? If a board is not satisfied with the tactical outcome, what are its strategic responsibilities and its proper limits in providing correction?

Chapter 3

Communication Is Key

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Chapter 3 explores the need for effective communication and collaboration between the board and its constituents—administration, staff, parents, students, and the community. The board needs to communicate with individuals in differing roles so they can understand, relate to, and carry out the board’s strategic direction. The authors suggest collaborative structures a board can use to listen and respond to needs and requirements, share interests, and elicit feedback.

1. What are the pros and cons of operating as a board of the whole? What tools, strategies, and data help the board operate as a whole? What are the implications for planning and preparing for board meetings of the whole? What are the implications for follow up and reporting?
2. Why is it imperative that the board establish and reflect upon ground rules to guide its behaviors and actions? What are the ground rules of your board, and how do you enforce them?
3. What are the pros and cons of operating as a committee? What is the relationship between a board committee and the board as a whole? What needs to occur to align the work of board committees and the full board? What are the implications for board committees on staff workloads?

On page 37, the authors state, “To accomplish its own work as part of the district whole and to work with each other, each role—the board (strategic), administration (tactical), and teachers (operational)—requires collaborative structures and communication processes.” Examine the Communication Structures and Processes chart on page 132.

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4. What communication structures and processes does your board use to interact with administration and staff? How effective are they? Give evidence to support your answer.
5. What communication structure and processes does your board have that allow administration to interact with staff and board? How effective are they? Give evidence to support your answer.
6. What communication structures and processes does your board have that allow staff to interact with administration and board? How effective are they? Give evidence to support your answer.
7. How does your board policy address the procedure for registering a complaint? Is it the same procedure for a student, parent, staff, or community complaint? How effective is your board in following the appropriate “chain of command” in addressing the complaint? What advantages for board members does a chain of command offer? Are complaints addressed in a timely way? Are complaints resolved in the best interests of the district? How do you know?

Examine the satisfaction survey items on page 137.

8. Why is satisfaction data an important indicator of success for a school district?
9. How often does your board routinely gather satisfaction data from students, staff, parents, and the community? How are the questions on satisfaction surveys determined? Are they aligned to strategic goals and initiatives? Is there a

correlation between questions across surveys—student, parent, staff, and community?

10. How are results reported in a timely way? How are they acted upon in a timely way?

Chapter 4

10 Signals That Your Board Is in Trouble

Chapter 4 identifies ten common instances in which boards abandon their strategic role and, in so doing, interfere with the smooth, aligned operation of the district. This makes the initiatives the board wants to achieve harder to accomplish—even when the board thinks it is helping make things happen. Review the ten signals in the chapter summary on pages 78–80. Four of those signals—1, 2, 9, and 10—are a result of *voting/decision-making* by a board; three—4, 5, and 7—are a result of *research/policy influences*; and three—3, 6, and 8—are *culture-based*. Then review the core values of a high-performing system outlined in Table 4–1: Core Values and Beliefs (page 74).

1. Assess your board’s performance over the last three years. Which trouble signals did you successfully avoid? To which signals has your board fallen victim? Which will be the most difficult for your board to address, and why?

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2. Think back to any differences over the last three years between your board and the superintendent, the administration, and/or the teachers' organization. What signals can you attach to them? Give specific examples. Discuss how the conflict could have been avoided.

The authors state on page 71, "A school district's culture is a web of habit, understandings, and perceptions about 'the way things have been done around here.' Staff members understand this culture intuitively; culture is the powerful glue that holds a school district together. In assessing the readiness of the school district to successfully embrace needed change, the board can't ignore the impact of culture."

3. How does the culture of your school system stack up against the core values of a high-performing system described on page 74? What are your strengths? How do you know? What are your opportunities for improvement? How do you know? How does the collective impact of these core values affect productivity and satisfaction in your school district?

The authors state on page 76, "The board, the superintendent, and union leadership must establish a productive and professional three-way partnership for the school district to continuously improve. . . . When all three parties aren't working together smoothly, too much time will be spent trying to resolve their differences and not enough will be spent working together to achieve the school district's strategic goals." Reflect on your three-way partnership.

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4. Is the relationship between the board, the superintendent, and union leadership productive and professional? How do you know? How do you communicate? How do you collaborate? How are differences resolved? How do you celebrate success together? How do you share opportunities for improvement together?
5. How do you renew your partnership when people change (board members, the superintendent, or the union leaders)?

Chapter 5

Data: A Critical Tool for Your School Board

Chapter 5 addresses the board’s use of data to celebrate success and identify what needs attention, focus, and improvement. The authors underscore the need for key data indicators aligned to strategic goals—from the classroom to the boardroom—in order to monitor and report progress.

The authors state on page 85, “Good data align to the long-term strategic goals of the school district. A school district’s challenge is to identify what kinds of data it needs to measure the success of plans to meet those goals.”

1. What are the essential data sources (key indicators of success) that align to your district’s strategic goals? For each indicator, answer the following questions:

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- When is the data collected? Is it formative data? Is it summative data?
 - For what purpose is it collected? Who uses the data? What decisions would be made using this data?
 - Is there something you wish the data would tell you that it does not?
 - Do you have trend data (data over time) for this indicator? What does the trend data tell you?
 - Do you have comparative data (comparing to similar and/or high-performing school districts)? What does the comparative data tell you?
2. Examine each of your strategic goals against the characteristics of a SMART goal. Which characteristics do they meet? Are any characteristics not met? Revise any strategic goal that is not already stated in SMART goal terms.

The authors state on page 92, “The board needs a simple, standardized format by which to organize and to effectively and transparently communicate to its staff and the public its strategic goals and its progress toward meeting them.” Review the scorecard example provided on pages 93 and 94. Notice how the “Indicator” and “When” columns make the “Priority/Aim” into a long-term strategic SMART goal for this district. Notice how the “B” column provides a baseline or beginning measure for the indicator at the time a target is set. The “G/T” column sets the target where the board would like to see the district within the time period established (for example, two years). The “C” column indicates where the district is as it works on meeting the target.

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Then examine the District Scorecard Calendar on page 147.

3. What are the long-term priorities (goals) of your district? How will your district's long-term goals fit within the format of a district performance scorecard?
4. Discuss the indicators for each of the priorities. How do they compare with your district's key indicators?
5. What advantages do you see in the development and use of a district scorecard to monitor and communicate progress to stakeholders about district improvement efforts? What concerns do you have? How do you feel about the alignment of data collection to administrative and meeting agendas?

The authors state on page 98, “By operating in a transparent way and sharing with staff and the public its strategic goals and the metrics by which it will measure success, the board must walk a fine line.” The feedback related to the data collection needs to encourage those working to meet the targets to keep them hopeful and motivated. At the same time, the feedback also needs to hold those people accountable to high expectations for improving performance results.

6. What is the board's strategic role in monitoring and reporting the key indicators of success? How will your board encourage high expectations? What will you do to celebrate successes? How will you decide what to encourage and what to celebrate?

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7. What is the proper balance between high expectations and celebration? How will your board prioritize its time to create that balance?
8. What is the role of the superintendent and other districts leaders in monitoring and reporting the key indicators of success? How do the strategic and tactical roles complement one another? How can the district strategic goals, targets, and indicators of success be used to align leader performance goals?

Chapter 6

Four Common Issues in Board Service

Chapter 6 delves into four common issues in board service to illustrate how strategic and tactical roles, in particular, can work together.

The authors state on page 105, “A team, then, isn’t a team just because its members say it is one. Different perspectives are needed for people to become a team, though they alone won’t guarantee that the individuals will become a team.” Respond to the following questions from the perspective of an aligned strategic/tactical/operational team.

Debates Over Class Size

1. Who should be a collaborative part of a decision about class size? What portions of the debate are most and least appropriate for the board to lead? How will

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class size decisions affect other parts of the organization? How would your board frame a comparison between costs of lowering class sizes versus educational benefits versus political desirability? How would you present these comparisons to the public? Give specific examples and their positive and/or negative implications.

Negotiations With Teachers

2. How can the board's concerns about resources versus roles conflict with each other? What conflicting messages—knowingly or unknowingly—might the board send to teachers across the bargaining table? Can the board “win” with the issues being discussed and still “lose” overall? If so, how? Give examples.

Assessing Student Achievement

3. Define the board's strategic role as it pertains to data. What data are appropriate and inappropriate for a board to see? What data are appropriate and inappropriate for a board to use as the basis for decisions? How does a board know the difference? What self-imposed rules for data should a board consider, and why?
4. In determining what achievement data to use, what tactical and operational considerations should the board take into account? How will the board identify these considerations? What is the role of the district performance scorecard in determining what data to use? What messages to the public can the board send through the district performance scorecard?

Strategic Budgeting

5. How should a strategic budgeting process begin? What is a board's role in that process? What are realistic criteria for aligning the budget? How will a board assess the potential cultural and political changes a significant budget revision might require?

Chapter 7

The Ethics of Board Service

Chapter 7 provides a rubric for achieving the gold standard. The rubric is grounded in research and best practice. It serves as a checkpoint for boards to apply the tools, strategies, and principles of strategic leadership outlined throughout the book.

The authors ask on page 123, “Why do so many board members abandon [their strategic] role and venture into a tactical role?” Examine the six factors presented in Table 7-1.

1. Why is staying strategic so important? Do you or other members of your board show behaviors and actions related to any of these factors that cause you to abandon your strategic role? Discuss examples that provide evidence for and against staying strategic. How can you assist one another in staying strategic?

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The authors state on page 124, “Collaboration is essential to your role; you and other board members must work collaboratively to make real change in the school district happen.”

2. What are your “rules for collaboration?” How do you collaboratively set strategic direction? How do you collaboratively assign tactical responsibility for developing actions related to strategic charges?
3. How do you strategically assess progress toward attaining those strategic charges? How do you strategically celebrate success and address opportunities for continued improvement related to those strategic charges? How do you ensure your progress assessments and celebrations are aligned with other roles and constituent groups?

Examine the rubric for the gold standard on pages 128–129.

4. For the eight indicators listed in Column 1, identify individually where you currently feel your board is—confused, understanding, or fulfilling its strategic role. Underline the words related to each indicator that reveal your next steps. Share your assessment with others, and arrive at a consensus on your collective strengths and opportunities for improvement.
5. Prioritize your opportunities for improvement. Now limit those priorities to the “vital few.” Identify your next steps to address those priorities.