

# **The Effective Policy Board**

## **A Handbook on Maximizing the Effectiveness of Education Boards as Policy Makers**

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**HAWAI'I EDUCATIONAL POLICY CENTER**



The Hawai'i Educational Policy Center is pleased to offer *The Effective Policy Board, A Handbook on Maximizing the Effectiveness of Education Boards as Policy Makers*. This Handbook is designed to assist education boards in optimizing their time and effectiveness, and to enlighten policy makers and community members as to the structure, powers, and roles of education boards. It includes not only a review of the best practices of successful boards, but also helpful checklists in areas such as policy making, communications, management of meetings, and building relationships with other policy makers and institutions.

The role of the Hawai'i Educational Policy Center in creating this handbook has been to collect useful research by individuals and organizations who regularly examine such issues, synthesize their observations and recommendations, and create a suggested set of guidelines or lists to assist board members and policy makers.

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## TABLE OF CONTENTS

1. Introduction.....	1
2. The Hawai‘i Education Board Quiz.....	3
3. History, Trends, and Reform Models.....	4
4. What <i>Should</i> Education Policy Boards Do?.....	7
5. What Knowledge and Approaches are Most Helpful for Board Members .....	14
6. Board Partnerships and Alliances .....	20
7. Effective Communication: The Voice of the Education Board.....	22
8. Summary .....	25
9. Master Check List .....	26
10. References and Other Sources .....	28

# 1. Introduction

This handbook is designed to assist education policy boards in optimizing their time and effectiveness. It includes not only a review of the best practices of successful boards, but also helpful checklists in areas such as policy making, approaches to data and research, effective communications, and building relationships with other policy makers and institutions.

## **The Need for the Handbook**

In the 2002 Session of the Hawai‘i State Legislature, proposals for decentralization of the governance structure of Hawai‘i’s public schools were the subject of spirited debate. Responding to disappointing student achievement in the public schools, and believing that educational outcomes were directly related to educational governance, legislators proposed a number of specific restructuring reforms. The common denominator among most of the proposals was the central role of a decision making educational policy board.

The following recent sequence of events highlights the need for this handbook.

- November 2002—Hawai‘i elected a new governor who campaigned on the issue of creating several decentralized boards of education.
- December 2002—For the second year in a row, the Hawai‘i Educational Policy Center’s Advisory Panel included on its recommended research agenda “duties and knowledge of board of education members; training; how to assess effectiveness...”
- 2003 Legislative Session—A wide range of advisory and policy-making systems involving decentralized boards were considered for the K–12 education system, making it likely that new or reformed educational boards, be they advisory or possessing true autonomy, will appear as features of Hawai‘i’s future system.

Hawai‘i’s education governance system has a number of boards with policy making authority. The state public school system is headed by a single Board of Education (BOE). The BOE consists of thirteen elected members, seven are elected according to a geographic region and six are elected at-large. One non-voting student member also serves on the Board. Eighty percent of the public schools have a stakeholder council under the School Community Based Management (SCBM) system. Finally, Hawai‘i’s growing number of charter schools are governed by similar stakeholder boards of directors.

According to the National Association of State Boards of Education (NASBE), thirty-four states appoint state education boards. Ten states elect their state boards, including four states—Hawaii, Nebraska, Nevada, and Utah—that hold non-partisan state board elections, and six states—Alabama, Colorado, Florida, Kansas, Michigan, and Texas—that elect state education boards through partisan elections. Three states—Louisiana, New Mexico, and Ohio—have a combination of elected and appointed members. In Washington, local school board members elect the state's board of education (NASBE, 2003).

There is a continuing need to examine how Hawai‘i education board members might best approach their policy making tasks, and how all boards might maximize their success in governing both large systems and individual schools. Hawai‘i’s educational institutions will continue to be led by policy making boards, and the creation of completely new boards is an increasing possibility.

Knowing how to be an effective education board member is not always easy, and members may or may not receive a new member orientation to help identify and deal with the challenges of their role. Board members are expected to have a hand in shaping the education system’s mission, but often hire a superintendent who arrives with a personal vision or approach. They should not be either micromanagers or “rubber stamps,” yet they must continually respond to an ever-changing policy environment created by impositions on the system from federal and state governments. In light of this complex picture, the Hawai‘i Education Policy Center examined a number of questions, including

- what do education boards do? Is there a consensus as to what boards ought to do (and ought *not* to do)? What is the difference between focusing on major policies, and focusing on administration?
- what should an education board member know? How should he or she manage the information and data on their system?
- what strategies are available to enhance the relationships between an education board and political leaders, other education boards, and the community?

While this study specifically looks at what analysts have learned about successful education boards, those who have explored the world of the non-profit board have contributions as well, and some of their findings are included.

A National School Boards Association (NSBA) Task Force on Public School Governance has recommended that local school governance officials be required to participate in annual training conducted by NSBA and state school boards associations. A 1996 NSBA survey reported that 13 states—Arkansas, Georgia, Kentucky, Minnesota, Mississippi, Missouri, New Jersey, North Carolina, North Dakota, Oklahoma, Tennessee, Texas, and Virginia—have mandatory training requirements for school board members. Many state school board associations have implemented extensive training programs (Resnick and Seamon, 1999). This study may provide some insights into why regular retreats and training may be valuable, and suggest the kinds of topics that may be most useful.

## 2. The Hawai'i Education Board Quiz

**How much do you know about Hawai'i's public education boards?**



1. **Hawai'i has a unique system because**
  - a. it is the only state with a statewide board of education.
  - b. it is the only state that has no elected or appointed district boards.
  - c. it is the only state that has a statewide superintendent.
  - d. it is the only state that has a limit on charter schools.
  
2. **In January 2002, the number of public schools in Hawai'i that had School Community Based Councils (SCBM) was**
  - a. about 150
  - b. about 250
  - c. about 300
  - d. about 200
  
3. **SCBM Councils have which of the following powers?**
  - a. to request waivers from certain laws and contract provisions
  - b. to select a school principal
  - c. to purchase text books and curricula for the school
  - d. to determine the overall school budget
  
4. **The Hawai'i State Board of Education (BOE) has how many elected members?**
  - a. Seven
  - b. Nine
  - c. Eleven
  - d. Thirteen
  
5. **The State BOE members are**
  - a. appointed by the President of the Senate and Speaker of the House.
  - b. appointed by the Governor, and confirmed by the Senate.
  - c. elected from single member districts every two years.
  - d. elected both at large and from geographical districts.
  
6. **The Hawai'i Board of Education meets as a full board**
  - a. once a week
  - b. twice a month
  - c. once a month
  - d. quarterly
  
7. **The federal No Child Left Behind Act**
  - a. holds the entire statewide system accountable.
  - b. requires that students eventually be tested every year from grades 3–8.
  - c. requires that states label certain schools as “failing.”
  - d. all of the above.
  
8. **Nationally, education school boards number about**
  - a. 5,000
  - b. 10,000
  - c. 15,000
  - d. 25,000
  
9. **Nationally, the number of local school board members number about**
  - a. 25,000
  - b. 65,000
  - c. 95,000
  - d. 125,000
  
10. **Nationally, the percentage of local school board members who are elected is about**
  - a. 96%
  - b. 75%
  - c. 50%
  - d. 37%.

Answers to the Quiz can be found at the end of this Handbook, page 34.

### 3. History, Trends, and Reform Models

#### A Bit of History

Education boards can be traced back to the 17<sup>th</sup> century. As early as 1647, a Massachusetts law gave people the power to establish schools and later elected “selectmen,” who were granted power to levy taxes for school support and to supervise teachers. Towns were given the right to “establish boundaries for school support and attendance” in 1789. In 1826, Massachusetts required each town to set up an independent school committee. By the end of the 19<sup>th</sup> century, other states established local school boards, with the number of local school trustees—as high as 45,000—often outnumbering teachers. These school boards were responsible for overseeing the full gamut of activities for public education. Today, across the nation, there are about 15,000 local school boards and 95,000 local school board members, 96% of whom are elected by their communities.

Historically, a consensus view of education boards’ roles defined three areas of responsibility:

- Boards should oversee public education for all children.
- Boards should value democracy in creating citizens for the nation.
- Boards should represent citizens’ beliefs and values in governing the school.

There has not been consensus, however, on how school boards have historically fulfilled or interpreted these responsibilities, or on what current understandings are about the role of boards during this period of change and reform.

#### Changing Trends and Challenges to Board Members

Issues and challenges that influence how board members perceive their mandate include the following:

1. *The nonpartisan environment.* Who runs (or is appointed) and why? Education board members are either appointed or elected. Over time, partisan political affiliations of either elected or appointed candidates came to be highly frowned upon. The non-partisan K–12 education board or university board of trustees is now the norm. Appointed members may feel they have an obligation to implement the agendas of those who appointed them, while elected members may feel they have a mandate to fulfill their public campaign promises. Whether personally or publicly motivated, board members are challenged to represent the nonpartisan interests of their primary constituencies, students and citizens of their school district, or a broader university community.
2. *Individual knowledge and qualifications.* What previous knowledge or experience should board members bring to their governance or trusteeship? Critical to effective leadership is qualified and knowledgeable decision-making. Today, given the complexities of overseeing the running of schools, board members are highly desired for the professional capacities, skills, and wisdom they bring to their job. In addition, they increasingly employ consultants and professionals who can advise and guide their decision-making or

even sometimes perform these functions for them. Federally imposed state and federal mandates tied to special funding and the growth in litigation of special cases continue to demand levels of expertise that board members may not have in practice but must be able to understand in theory. Voters or those who appoint board members are challenged to select those who have professional skills in assessment and evaluation, because they will be held accountable for their own performance as well as school outcomes.

3. *Socio-economic changes both locally and nationally.* To what major social or economic events or trends should board members respond? The severity of impacts on schools may depend on board members' broader knowledge of their society. Historically, influential events included post WWII increases in military industry and technology, the recycling of presidential election years and party agendas, cyclical periods of recession and inflation, ideological shifts in Congress, international conflicts and wars, new immigrants and immigration policies, and increases or decreases in the local job market. These and other changes impacted curriculum, program development, counseling services, availability of grants for professional training, and educational programs. To respond adequately, board members are challenged to assess and respond to the needs of their students and community in their quest to acquire and utilize resources to meet the instructional and financial goals for their schools.
4. *Demographic changes.* Changes in the social-cultural make up of each generation have affected board behavior. What sensitivities should board members exhibit or cultivate? From the inauguration of the civil rights movement to the defense of civil liberties for gay and lesbian students, society is becoming increasingly less homogeneous. Diversity is here to stay. Board members are challenged to be unbiased in the perspectives they take in decision-making with sensitivity in determining what is best for a variety of students and parents from different backgrounds and cultures, and with different educational goals.
5. *The shift away from top-down authoritarian governance.* With trends in governance moving toward cooperative school community-based models, what democratic practices and attitudes should board members embrace? The current emphasis on networking, collaboration, consultation, community and parent participation, and student and faculty voices has transformed thinking about education governance issues. Boards are less at the top of the pyramid, and more at the center of the hurricane. Members are challenged to develop personal skills in working with others, negotiating contracts with unions, and communicating with faculty, parents, political leaders, and students. Members governing public institutions are often expected to encourage open dialogue.
6. *Information technology.* How attuned are board members to the information age? Fifty years ago there were few educational policy centers, and little research. In 1992, there were only fifty sites on the World Wide Web. Today, a conscientious policy maker must struggle to keep up with the explosion of studies, which are often contradictory in their conclusions. Board members are challenged not only to incorporate information

technologies into their schools or universities, but also to ensure an appropriate flow of necessary and useful analytical information for their own policy making.

7. *Dramatic shifts in state and federal influence and relationships.* How responsive or independent should board members be to these shifts? One recent federal policy, embodied in the No Child Left Behind Act (NCLB), shifts some power and authority from local districts to statewide boards or departments. Under NCLB, the measures of accountability are often focused at the state level, particularly in the requirements that states submit a plan for standards, accountability, testing, and various other requirements such as the right of students to transfer out of a “failing” school. NCLB has imposed a number of requirements that state governments argue are unfunded mandates, such as the cost of creating, teaching to, and administering yearly high-stake tests, and the remedial measures required when schools fail to make yearly progress. Board members are challenged to take these trends into account without necessarily abandoning their sense of vision or mission.

### **Governance Trends and Models: 1950s–Present**

After World War II, it is possible to divide the evolution of school board governance into five phases or periods: (1) The 1950s—with an emphasis on democratic local government; (2) The 1960s—when the federal government grew and established a variety of federal education grants and laws; (3) The 1970s—when there was an emphasis on democratic pluralism and multiculturalism; (4) The 1980s—when diversity and privatization grew in influence; and (5) 1995 to the present—when new federal mandates (No Child Left Behind) pushed state standards, high-stake testing, unfunded mandates, and accountability (Bolman, et. al, 1995).

In summary, major trends, as well as the way in which individual board members view their entire system, have evolved over time and continue to challenge educational boards to adapt and respond to the changing educational environment.

## 4. What *Should* Education Policy Boards Do?

### School Governance: Some Fundamentals

In the 1999 report, *Effective School Governance: A Look At Today's Practice and Tomorrow's Promise*, Michael A. Resnick, Associate Executive Director of the National School Boards Association (NSBA), and Harold P. Seamon, Deputy Executive Director of NSBA, identified several fundamentals of good board operations:

- **Setting the Vision**—Developing and cultivating a powerful and compelling vision for district efforts is a primary responsibility for today's and tomorrow's school leaders. It encompasses the best in forward thinking, innovative planning and community involvement. As representatives of the community and governors of the school system, school boards are the best catalysts for stimulating the dialogue and obtaining the consensus necessary to shape a dynamic and responsive district vision.
- **Focusing on Student Learning and Achievement**—Simply stated, an effective school board focuses on raising student achievement and learning to higher and higher levels. Its goal is to “add value” to the student-teacher learning experience.
- **Providing a Structure for Success**—Effective school boards establish a management system that results in thoughtful decision-making processes and enables all people to help the district achieve its vision and make the best use of resources. They create an environment that allows the superintendent to function as the district's chief executive officer and as the community's primary education leader.
- **Advocating for Education**—Schools cannot maximize success without public support. Fulfilling the district's vision requires the understanding, involvement, and support of the local community, as well as state and federal policymakers. The board of education, because of its close ties to constituents, is uniquely positioned to be the catalyst to gain that support.
- **Involving the Community**—Good governance requires engaging the community in the effort to create conditions in schools, the home and the community that will foster student learning. School boards long have understood that the schools they govern will not have the necessary financial resources to be successful without strong public support.
- **Accounting for Results**—Good governance requires the board to determine whether the district truly is progressing toward accomplishment of its vision. That progress (or lack thereof) must be measured and communicated to district constituents. Boards hold themselves and the system publicly accountable by establishing clear objectives and reporting them in quantifiable terms.

- Empowering the Staff—Good governance is synonymous with effective decision-making. Increasingly, boards are providing more decision-making authority and accountability to the building and classroom levels.
- Fulfilling the Policymaker’s Role—A school board’s policies provide ongoing guidance and direction to the school system and create a framework within which the superintendent and staff fulfill their responsibilities with positive direction. As elected bodies, school boards are best able to formulate policies to meet the differing needs of differing communities.
- Collaborating with Other Agencies—For a growing number of children, the conditions they face outside the classroom have a dramatic impact on their ability to learn. Too often, services to address children and family needs are fragmented, with each designed to address a specific need or problem. Because schools are responsible for serving all children, and are often the most accessible, appropriate, and accountable institutions in children’s lives, they have become an integral component in much successful collaboration. School boards are ideally situated to coordinate policies and activities with private institutions responsible for child development, health, welfare and related services.
- Committing to Continuous Improvement—Effective boards seek to be up-to-date on key developments in education, including emerging state requirements, research findings and effective practices. They also must know legal, fiscal and other issues pertaining to school district governance, as well as the rules of parliamentary process, ethics and civility in conducting business. Thirteen states have mandatory training requirements for school board members. Many state school board associations have implemented extensive training programs.

### **Routine Basics: What Boards *Usually* Do**

As elected or appointed officials, board members ideally represent the values and priorities of their constituents and taxpayers. They provide stewardship and direction for their institutions by enacting and overseeing policies, and by discussing and deliberating on a variety of issues pertaining to their jurisdictional domain.

The Education Commission of the States (ECS) identified the following thirteen common responsibilities of school boards across the nation:

1. Hiring, evaluating, and if necessary, dismissing the superintendent
2. Adopting a vision for the district, in partnership with the superintendent after gaining input from educational stakeholders in a school system
3. Adopting district-wide academic content and performance standards
4. Creating district-wide academic content and performance standards
5. Adopting district-wide policies that provide incentives for progress and consequences for failure for all decision makers in the district, as well as for students

6. In partnership with the superintendent, tracking progress toward, and keeping attention focused on student learning goals and the academic content and performance standards and measures
7. Setting financial goals, monitoring finances, ensuring that accounts are audited annually and publishing an annual end-of-the year financial report
8. Approving an annual budget that organizes the district's resources in support of student learning goals and academic content and performance standards, and ensures that school facilities meet health, safety, and educational requirements
9. Issuing bonds, levying taxes and ensuring that taxes are collected
10. Establishing a minimum dollar amount for contracts requiring school boards approval
11. Approving contracts with employer groups
12. Approving plans for renovating and building school facilities, after seeking and considering community input
13. Evaluating its own performance (Ziebarth, 2002, p.1)

While these functions are common, not all are considered “best practices” by those who study boards. ECS itself advocates that each state create a Task Force on Effective School Boards and Superintendents to ensure that the laws and the practices of boards are able to meet the challenges facing school systems and districts.

### **What Nonprofits Have to Offer**

An increasingly accepted model for nonprofit boards, promoted by Atlanta consultant John Carver, focuses on policy governance. According to Carver, the purpose of any board is to act on behalf of some ownership group (such as taxpayers or stockholders), and to see that the organization achieves its goals and avoids what is unacceptable. This, he says, requires four types of rules or policies:

1. policies about ends, specifying the results, recipients, and costs of results intended
2. policies that limit CEO (superintendent) authority about methods, practices, situations, and conduct
3. policies that prescribe how the board will operate
4. policies that delineate the manner in which governance is linked to management (Carver, 2000)

John Carver reviewed some of the problems he observed in the nonprofit world:

An extraterrestrial observer of board behavior could be forgiven for concluding that boards exist for several questionable reasons. They seem to exist to help the staff, to lend their prestige to organizations, to rubber stamp management desires, to give board members an opportunity to be unappointed department heads, to be sure staffs get the funds they want, to micromanage organizations, to protect lower staff from management, and sometimes even to gain some advantage for board members as special customers of their organizations, or to give board members a prestigious addition to their resumes (Carver and Carver, 2001).

Carver's litany of nonprofit board behavior may be helpful in identifying persistent pitfalls for all boards of directors, regardless of their mission. It also suggests that regular training of education board members is useful.

Analyst and author Gene Royer (1996) also applied Carver's policy governance principles to local school boards: "[t]he nearest some school boards actually come to discussing the betterment of children is to hash out the mundane specifics of student dress code and hair length." Instead, he says boards should address these kinds of issues at "the level commensurate with its governance position." Governing by policy at the level (and in the manner) Carver suggests would have the board asking itself such questions as, "Why do we want the students to adhere to a dress code in the first place? What are the governing values to be expressed here?"

Royer noted that when confronted with a large, complex system, it is natural for a board to want to maintain a sense of control by focusing on smaller, more familiar topics. "School boards are as susceptible as any nonprofit or public board to the beguiling discussion of trivia," Royer writes. "The board job is a talking job...and a board will discuss just about anything that is raised—often lifting the handling of trivia to an art form." (p. 32)

### **The Policy Governance Approach**

Other analysts of nonprofit boards also offer helpful priorities for policy governance, including these listed by the web-based [www.BoardSource.org](http://www.BoardSource.org):

1. determining the organization's mission and purposes
2. selecting the chief executive
3. supporting the chief executive and assessing his or her performance
4. ensuring effective organizational planning
5. ensuring adequate resources
6. managing resources effectively
7. determining, monitoring, and strengthening the organization's programs and services
8. enhancing the organization's public standing
9. ensuring legal and ethical integrity and maintaining accountability
10. recruiting and orienting new board members and assessing board performance

This list includes the important tasks of enhancing public standing and ensuring legal and ethical integrity, tasks that emphasize the relationship of the board to the larger community.

It is worth noting that these tasks are expressed in language that implies a certain restraint in terms of engagement in detailed management. The board is not urged to do organizational planning itself or manage the details of a budget. Instead, the board should "ensure" good planning, and "ensure" adequate resources. Boards are encouraged to determine which programs and services are offered, and monitor their effectiveness, but not to run the programs or become engaged in detailed service delivery systems.

This point is also made in the *Report of the Twentieth Century Fund Task Force on School Governance*:

The task force believes that school boards must become policy boards instead of collective management committees. This will require granting them the policymaking latitude that would allow them to function as bodies responsible for governance; they will be responsible for setting broad policy guidelines, establishing oversight procedures, defining standards of accountability, and assuring adequate planning for future needs. While professionals would oversee the myriad details of running public schools, as they theoretically do now, they would do so within the constraints and policy parameters established by those governing local education: the education policy board (Resnick and Seamon, 1999, p.25).

In a January 2002 study, Deborah Land cited case studies from nine metropolitan districts showing that many boards lack procedures for policy oversight and evaluation. A national review of policy manuals for 130 school districts found many school boards lacked a central policy manual. And finally, two studies of board minutes found only a small percentage of board decisions actually focused on policy (Land, 2002, p. 27-28).

The policy governance model, with its emphasis on asking the larger questions and attending to the overall effectiveness of the institution, challenges the approach of many boards who are not accustomed to distinguishing between policy and management.

### **Strategic Planning**

In order to exercise the strong leadership required of most boards, the National Association of State Boards of Education (NASBE) advocates that a comprehensive strategic planning process be undertaken every three to five years (NASBE, 2002a). A board needs a clear understanding its own mission (as distinct from that of the organization it governs), the legal and moral reasons for its existence, and of the strategies it will use to achieve that mission.

Most K–12 boards invest a significant amount of time and energy in crafting their vision, mission and goals, but are less successful in implementing specific strategies for achieving those goals (NASBE, 2002a). Common elements of strategic planning that are critical to achieving success are

- sub-strategies with measurable goals;
- use of a timetable;
- clear direction to staff;
- collaboration with key constituencies;
- alignment of the board’s agenda to strategies and goals;
- allocation of resources to strategies and goals; and
- evaluation.

## **Evaluation**

The issue of self evaluation has been addressed by numerous studies which often show that boards seldom evaluate themselves regularly. A 1986 review of 216 school board chairs found only a third regularly conducted evaluations. A national survey of more than 700 superintendents reported that only a quarter of their boards evaluated themselves (Land, 2002, p. 30).

NASBE advises policy-making boards to adopt policies with identified education goals and evaluate their effectiveness in achieving those goals by following a logical sequence of distinct policy steps:

Issue Statement. When an issue is brought before a board, a determination is made regarding appropriate board action. The issue is not left in limbo.

Issue Evaluation. The board commits time to study the issue by determining the current status of the issue and what research says about it. It is not just left to a subsequent agenda.

Data Gathering. The board takes time to examine and discuss data in order to learn how policies may affect specific populations and what resources are available to those responsible for implementation.

Public Engagement. Through public engagement forums and interactions with appropriate stakeholders, the board gains useful information for policy development.

Drafting Policy. Boards guide the development of policy by staff, rather than wait for staff to propose policies.

Additional Engagement. Additional targeted engagement with stakeholders around the drafted language may be appropriate.

Policy Statement. Once the final language is adopted and disseminated, the board acknowledges those who provided input (NASBE, 2000).

Establishing policy review cycles enables boards to systematically evaluate the effectiveness and appropriateness of their policies. In its 1986 report, *The Challenge of Leadership*, NASBE recommended policy reviews as a critical component of accountability.

## **In Summary**

There is a growing body of research and opinion showing that boards operate best when they understand and respect the distinction between broad policy governance and management. These perspectives are shared by analysts who look at boards of trustees for universities, nonprofit boards of directors, and boards of education.

### **Checklist for Planning, Creating, and Reviewing Policies**

- Identify and periodically reaffirm the board's purpose, mission, and authorities.
- Create measurable goals and timelines for policy ends, not means.
- Identify existing policies that support the board's mission.
- Review the existing strategic plan or initiate efforts to develop a plan and policies designed to achieve the board's measurable goals and objectives.
- Analyze issues using research-based data from sources beyond the departmental or staff.
- Include educational stakeholders in discussions about issues and policy making before decisions are framed and made.
- Invite the public to participate in issue oriented forums separate from board business meetings.
- Guide policy development by providing clear directions to staff, and adopting outcomes that are objective and measurable.
- Acknowledge individuals providing input.
- Establish and implement policy review cycles to evaluate policies.
- Initiate annual training for board members.

## 5. What Knowledge and Approaches are Most Helpful for Board Members?

### Characteristics of the “Good” Board Member

The Iowa Association of School Boards’ Lighthouse Study (Iowa Association of School Boards, 2001) found that school boards in high-achieving districts were significantly different in their knowledge and beliefs than school boards in low-achieving districts. The study found three main differences:

- **Elevating vs. accepting belief system.** The board, superintendent and staff in high-achieving districts consistently expressed an elevating view of students as emerging and flexible, and saw the school’s job as that of releasing each student’s potential. They viewed the system critically and were constantly seeking opportunities to improve. Low-achieving districts viewed students as limited by their income or home situation. They focused on managing the school environment, not changing or improving it.
- **Understanding of and focus on school renewal.** High-achieving districts had board members who were knowledgeable about school improvement initiatives and could identify the boards’ role in supporting them. In low-achieving districts, board members were only vaguely aware of school improvement initiatives.
- **Applications to classrooms.** In high-achieving districts, the boards’ knowledge and beliefs were connected to action at classroom levels by principals and teachers. In low-achieving districts it was impossible to see the connections across the system.

The National Association of State Boards of Education’s Education Study Group on Educational Governance created the following imaginary job description that reflected their view of the duties and qualifications for a school board member (NASBE, 1996).

<p style="text-align: center;"><b>POSITION AVAILABLE</b> <b>Public Education Board Member</b> <i>Seeking a person of integrity, judgment, and good character to devote time and energy to public service.</i></p> <p><b>DUTIES</b></p> <ul style="list-style-type: none"><li>• Represents and advocates for the educational and developmental needs of children and youth, their families, and society in general.</li><li>• Works with colleagues to develop a vision for education and adopt goals, standards, policies, and rules for the public education system that are consistent with the board’s mission and vision.</li><li>• Engages in continual dialogue with political authorities, community leaders, media representatives, and members of the general public on issues of importance to public education.</li></ul>
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- Reaches consensus with other board members on selection and evaluation criteria for the position of chief education administrator, and on the recruitment and hiring of a qualified person.
- Monitors and evaluates the performance of the chief education administrator and the system as a whole and takes corrective action as required.

#### QUALIFICATIONS

- **Credibility**—has experience with service to the community; understands the needs, interests, and views of a broad cross-section of the population, not just of a particular community; embodies honesty, integrity, trustworthiness, fairness, and civility.
- **Dedication**—demonstrates commitment to the board’s mission and to the principle that all children can learn to high standards; studies agenda issues thoroughly and prepares for meetings; is willing to devote large amounts of time and energy to public service.
- **Leadership**—advocates a coherent, future-oriented vision for public education; communicates well in public; functions effectively in the political arena.
- **Collegiality**—readily teams with people of varied backgrounds; seeks common ground among those holding differing views; seeks compromise and consensus after a fair and sincere discussion of rival positions.
- **Judgment**— makes decisions according to the best available research and information; weighs possible consequences of decisions; able to make urgently needed decisions even if full information is not available; considers ideas that challenge conventional wisdom.
- **Humility**—recognizes personal limits of abilities and knowledge; seeks out and listens to all views with respect; changes positions when presented with better information; follows as well as leads.
- **Fortitude**—makes hard decisions; withstands pressure from special interests and political leaders; maintains composure while under verbal attack; tolerates uncertainty, ambiguity, delays, and setbacks.
- **Awareness**—has some familiarity with current issues in public education: expertise or specialized knowledge is desirable, but not essential.
- **Loyalty**—commits to support board decisions even when on the losing side.

### What Knowledge is Helpful?

An examination of the various studies on policy making by education boards, indicates that a working knowledge in the following areas would appear to be helpful for board members:

1. **Decision Making.** The effective board is aware of where operational decisions are made within their system, and by whom, and distinguishes between the paper organization charts and the real world of decision making for education.
2. **New ideas, innovation, expertise.** No organization or system has enough internal knowledge, and many discourage internal innovation. Policymakers need to ensure that when significant administrative decisions are made, there is an effort to go outside of the organization for ideas and validation. Often this involves partnerships with other educational institutions, such as universities, nonprofit groups, etc. Even a large system can become isolated and insular.

3. **Big picture perspectives.** Effective boards have the ability to see trends, patterns, or fragmentation. If every school or campus is different and isolated, there is no system. If accountability is to be meaningful, policy makers need to ask for and receive data that is likely to reveal positive or negative patterns in operations and achievements. Data that cannot illuminate patterns or trends are often useless.
4. **Systemic policy thought.** Effective boards address the entire system in the context of the P–20 continuum. Yearly goals are fine, but students enter the public school system after some pre-school preparation, and spend a minimum of twelve years moving from elementary to middle to high schools. Colleges should know what is coming and how they can reach out, and K–12 systems should know where students are heading. Longer-term temporal and institutional linkages are part of systemic policy making.

### **Managing Information —what kinds of data and information should a board request?**

The National Association of State Boards of Education (2002b) has this comment on data:

The information board members receive on the issues is intended to augment decision making, but it can also impede this process. Frequently members are confronted with exorbitant amounts of information by staff who want to ensure that members have adequate data when making decisions...Members often complain that the volume of materials received overwhelms them or is presented in a way that does not cultivate the vigorous debate they believe is essential to good policymaking. Additionally, concerns over the lead time members have to digest large volumes of information sometimes drives staff to provide too much or too little information to ensure an issue has a place holder on the board agenda. Staff must balance the need to provide comprehensive data on momentous issues and adequate information on subordinate issues, while responding to individual members' request for information. They must do this in a way that is useful to board members and is done in a timely fashion.

NASBE also suggests that there are several criteria board members should use in evaluating the quality of their information.

**The relevancy of information.** Board members and states should work to ensure that they have the best information available on the issue, and that the information informs the discussion; and that is directly related to the issue, to the state, and to the students the policy is directed toward. It should support the meaningful participation of all board members in the decision making process and add value to policy discussions.

**Balance in the amount of information.** During the period when board members are being initially informed about an issue, it is important to provide a diversity of perspectives to ensure that the resulting discussion and policy are well informed.

Board members should be given an opportunity to seek clarification on the information and, when appropriate, request an interpretation of the information.

**The timing of the information.** Most states have a specific number of days between the time board materials are sent to members and the board meets. When there is a large amount of information that must be shared with the board on a particular issue, adequate time must be provided to board members to read and prepare for the meeting. That could mean sending some materials ahead of the regular board mailing. Board members should not be given extensive materials at a meeting and be expected to act upon that information immediately.

### **Understanding Reform**

All reforms involve change, but not all change positively impacts student learning. Often the impacts of change on staff time are under-appreciated. Effective policy-makers at a state, district, or university level persistently ask the following questions before embarking on changes in the system:

- (1) Will the proposal improve the campus or classroom physical environment?
- (2) Will the proposal increase or decrease the ability of the school administration or staff to know what is going on with each student? Will students be lost in the crowd?
- (3) Will the proposal improve student attitudes toward learning? Will it increase opportunities/time/requirements to read and write challenging materials? Will it provide opportunities to complete homework, projects, and research, or to use technology? Will it provide quality textbooks and take-home materials?
- (4) Will the proposal increase or decrease critical thinking components of the curriculum or lead to greater achievement of performance standards in each subject? Will it enhance the school's ability to respond to diverse styles, paces or cultural preferences for learning, or to individual talents among students?
- (5) Will the proposal change teachers' attitudes toward teaching? Will it increase the amount of time available to prepare lessons, acquire in-service training, assign (and correct) challenging work, or build on what was taught the previous semester or year?
- (6) Will the proposal increase or decrease paperwork for the teachers, administrators, or staff? If so, how will time be re-allocated?
- (7) Will the proposal increase or decrease the school or campus administrator's time or ability to support teachers?
- (8) Will the proposal change community and parental attitudes toward education and the school, or the quality of the communication between the school, its parents, and the community?
- (9) Will the proposal increase or decrease the ability of the parents, school, or teachers to compare and interpret meaningful data and achievements?
- (10) Will the proposal increase or decrease the desire to attend, teach at, or work at a public school?

## Approaches to Reform: How do board members think about their school?

Lee Bolman et al. (1995) suggest that thinking about a school system using well known metaphors can actually help new board members sort out their attitudes toward collaborative thinking and communications among stakeholders. They call these ‘perspective taking’ strategies that emphasize the big picture in “a conscious effort to size up a situation from multiple angles” by focusing on how we think about schools in order to facilitate system change and educational reform. They see four ways in which entire schools or schools systems are perceived: as a factory, as an extended family, as a jungle, or as a temple.

Four major ways of understanding schools

If your school is a	Your leadership role is	Your ethical responsibility is
Factory	Technical expert	Excellence
Extended family	Servant	Caring
Jungle	Advocate	Justice
Temple	Spiritual leader	Promoting faith

The *factory perspective* emphasizes productivity and clarity. Structural reformers focus on setting clear goals and roles for individuals and groups through identifying whose authority, and what policies and rules, must be adhered to. Problems arise from confusion or misalignments in the formal system. Board members are technical experts who can resolve problems by making sure roles are clearly defined, shifting authority to appropriate persons, or restructuring the organization.

The *extended family perspective* emphasizes that the schools work best when personal individual needs are satisfied in a caring, trusting work environment. There is a premium placed on human relationships, showing concern and respect for others, providing for inclusion in governance, participation in shared decision-making, and enlisting people’s commitment and involvement in educational goals. Board members need to act as role models in demonstrating behaviors and developing relationships which advocate a sense of ownership, justice, and fairness.

The *jungle perspective* emphasizes the limits of authority and the idea that the scarcity of resources cannot fulfill all that schools demand. Board members, administrators, teacher unions, and community members get caught up in politics, bargaining of goals, and jockeying for power, and goals emerge out of a struggle among different interests rather than rational analysis or top-down decision-making. Conflict management of the politics of school systems is emphasized in this model.

The *temple perspective* emphasizes symbolic meanings in schooling and cultivates educational beliefs, commitment, hope, and loyalty. Board members have an almost spiritual view of schools as temples where faith, ritual, and ceremony contribute to common institutional culture, all are used to transform the school as a center of the

community. Board members support schooling and education that reaches beyond classroom walls and playground borders.

### **In Summary**

Policy making requires that education board members focus on the big picture, and ask questions of themselves and others that lead to meaningful policy discussions and formulations. Many authors and analysts warn of the danger of being bogged down with large amounts of trivia or data that cannot be utilized in meaningful policy making. Even the kinds and formats of data provided by staff need to be adapted to broad policy making.

### **Checklist for Policy Making Data and Board Members' Knowledge**

- Insist on the relevancy, timing, balance and appropriate amount of information.
- Understand who makes decisions and at what level.
- Seek new ideas, innovations, and even basic expertise from outside.
- Emphasize big picture perspectives.
- Explore systemic P–20 policy approaches.
- Cultivate an operational understanding of reform.

## **6. Board Partnerships and Alliances**

Productive partnerships between boards and governors, departments of education, legislatures, educational stakeholders, and institutions of higher education are crucial for success.

Questions that are addressed in this section include

- how should boards of education relate effectively to political leaders?
- how can boards effectively partner with the educational community?
- what types of partnerships are possible between K–12 systems and higher educational institutions?

### **Relationships with the Governor and the Legislature**

Good working relationships with the governor and legislative leaders require time-consuming planning and frequent communication, but the benefits are worth the effort. In working with the governor, a board of education needs to ensure regular opportunities for the governor's views to be presented constructively.

Building a strong relationship with the legislature may entail establishing a legislative committee to ensure that the board's concerns are accurately conveyed to legislators. The more support the board is able to generate for its legislative priorities, the more likely it is that they will be acted upon favorably by the legislature. Boards should consider

- establishing a process for regular communication with members of key legislative committees and their staff, especially during the heat of a legislative session.
- regularly transmitting *reliable* information on the board's activities to the legislature.
- inviting legislators or staff to the board's work sessions.
- preparing briefings for newly elected legislators informing them of the board's mission, goals, and strategic plan (NASBE, 2000).

### **Relationships with the Education Community**

Common connections between state boards and education constituencies are achieved through public hearings or board presentations, awards programs, annual assemblies, and coordinated lobbying activities. Boards should examine, evaluate, and clarify operational policies, describing how they interact with education constituencies on a continuing basis.

Groups in the education community representing large, vested interests in the work of the board include parents, students, teachers and teacher unions, principals and their unions, superintendents and their professional staffs, political parties, business interests, and other educational institutions.

An important insight among some analysts is the recognition that formal business meetings are not always the most effective venue to engage the education stakeholders or the general community in dialogue about public education. Some suggest that boards of public education make an effort to schedule informal discussions and feedback meetings at times and places convenient for those working during the day. Business meetings are thought to be less culturally inviting to many groups or individuals who may be reluctant to step forward with formal testimony.

### **Relationships between K–12 and Higher Educational Systems**

NASBE (1994) recommendations on state board policy linkages with higher education include the establishment of P–20 linkages in curriculum, teacher education and professional development, and a system of life-long learning.

A P–20 approach suggests a number of structural and procedural arrangements and partnerships. These might include a governance system that guides, manages, and nurtures the entire P–20 continuum, such as was initiated in Georgia, which emphasizes coordination and linkages between K–12 public school districts and the public university system. A more dramatic example would be in Florida where the K–12 Board of Education and the University Board of Regents were combined into a single governance board. An administrative leadership preparation and professional development system is needed that defines accountability and competence to include knowledge of and response to the needs of teachers, students, administrators, and schools that precede or follow one's place in P–20 system.

This P–20 perspective challenges traditional separation between lower and higher education. In Hawai'i, for example, stakeholders interested in both systems often must choose which education board meeting to attend, as the university Board of Regents and the state Board of Education may hold meetings at the same time. Joint meetings between the two groups or their subcommittees have not been held in recent years. The relationships implied in a P–20 system could be approached as a fundamental framework for policy-making.

### **Checklist for Key Partnerships**

- Establish meaningful times and venues for interaction with the governor.
- Establish a process for regular communication with members of key legislative committees and their staff; regularly transmit information regarding the board's activities to the legislature, invite legislators or staff to the board's work sessions, and prepare briefings for newly elected legislators informing them of the board's mission, goals, and strategic plan (NASBE, 2000).
- Establish a process for communication and interaction with key education stakeholders, including adoption of meeting schedules that minimize conflicts with other education boards.

## **7. Effective Communication: The Voice of the Education Board**

Today's policy-making higher and lower education boards face a number of challenges peculiar to the Information Age. These include the need for an explicit communications strategy (complete with goals, objectives, and measures of effectiveness), taking advantage of the new technologies, and appreciating the tension between electronic communications and laws requiring open and announced meetings.

### **Effective Communication Plans**

According to NASBE (2002), a good communication plan decreases the misunderstanding and acrimony that sometimes develops around new board policies or actions. Typically, state boards don't have effective communication strategies because

- they lack staff assigned to this effort;
- the department of education has its own strategy;
- there is department resistance to a board communication plan; and/or
- the board lacks clear communication goals.

The rationale for developing an effective communication plan includes

- the need to engage and inform the public;
- the need to change and impact public perception about policy;
- the need to engage and inform the stakeholders in the education and business communities;
- the need to increase public, political, and legislative understanding, as well as support and funding for public education in general;
- the need to explain the rationale, impacts, and outcomes of adopted educational reforms; and
- the need to increase the visibility and effectiveness of the board as a voice for public education.

### **The Lack of a Recognized Voice for the Board.**

In a 1999 survey of urban residents and urban school board members, only 37% of the urban public rated the performance of their board good to excellent, and only 39% felt their board created most of the policies governing local schools. There is clearly a lack of knowledge or appreciation of the importance of the local boards (Land, 2002, p. 26).

It is not uncommon for the public to recognize the president of a university or the superintendent of a department of education, but be completely unfamiliar with members of the policy making board that guides these institutions. Nationally, very few state

boards have communications or public relations staff whose responsibility it is to ensure that the board's interests are effectively communicated to the education community and to the public. Instead, communication plans frequently reflect the views and the roles of the agency, not those of the board. This is also the result, in some cases, of confusion between the roles of a policy making board and the department of education, or, in the case of a university, the board of regents and the university administration.

NASBE (1999) notes that in some states where the chief state school officer is elected or is appointed by the governor, there is often a lack of understanding of the value of a board-specific plan. Without a clear delineation of the governance value and the management value of integrated communication strategies, there is generally resistance by the department or the university to the board creating its own communication plan. This is often alleviated as boards become more discerning regarding the value of communication plans, and become better able to articulate their communication goals and the anticipated results of a sound plan to a reluctant agency staff.

### **New Technologies**

Today, broadcasting includes not only radio and local television channels, but also cable channels and web casting. Commercial print, TV, and radio no longer provide most of the opportunities for the public and other policy makers to learn about public education. In fact, part of the problem is that, with all the competition for the public's attention, any one source of information or engagement is likely to be lost in a glut of alternative media offerings.

### **Targeted Communication**

For an already interested and engaged segment of the community, there are ample opportunities for communication, and these should be optimized. These include

- cable channels devoted to public affairs discussions;
- cable coverage of boards of regents and boards of education;
- prerecorded discussions and presentations;
- web casting, providing both live broadcasting and the ability to download the electronic record for future viewing and creation of an archival system;
- posting basic information on a web page;
- moderated, televised forums in real time; and
- email list serves to circulate basic information.

Why might an aggressive communications strategy be needed? It is needed primarily because it is not easy for interested citizens or stakeholders to monitor or participate in education governance. A university board of regents may have its own web page, but meetings of regents might not be well covered by cable stations as is the case with more well-known policy making bodies, such as a state legislature or a board of education. Communications with the public are often left to the agencies the education boards govern. School based management councils and charter school boards are often virtually invisible to the general public and other policy makers. Real-time public hearings that allow for public testimony or input through video conferencing are not yet well integrated

into education governance in many districts. Statewide boards who rotate their regular meetings to different campuses or areas of a state pose additional challenges for interested citizens and stakeholders.

### **Checklist for Engaging the Media**

While the local media are recognized as vehicles to carry the messages of education boards, they are often neglected as the “targets” of communication. The following checklist may be helpful in creating an effective communication strategy.

- Select articulate, technically competent persons to facilitate effective board communications.
- Cultivate the ability to reach the media on short notice. Develop a complete list of print, radio and television media including mailing addresses; regular telephone, cell phone, fax and email contact numbers; and a complete list of the reporters and their editors who influence coverage of educational issues. Create a set of media packets for new and experienced reporters that has information on the board of education or regents, and basic data on education.
- Develop regular public service announcements on TV and radio on behalf of the board itself.
- Develop a single-sheet summary of board actions or business for distribution by fax or email to the educational community, policy makers and decision makers.
- Develop a multi-layered email list serve for board members, key administrative staff, district and school personnel, policy makers, etc.
- Adopt procedures consistent with the sunshine law for communications among board members.
- Adopt a meeting schedule of that minimizes conflicts with other education policy boards.
- Ensure relationships are healthy and productive and make contact with new media people by adopting a strategy for regular contact with media representatives.

## 8. Summary

Few of the suggestions or recommendations put forth by analysts in this report would be controversial in and of themselves. Most boards might be tempted to conclude, “We do that!” Yet taken as a whole, the “best practices” suggested by analysts of education boards suggest that boards often lose sight of these recommendations.

To summarize these “best practices” offered by the various researchers cited in this report, effective boards

- focus on big picture tasks such as forming and sustaining a mission, a set of goals, or major policies.
- minimize time spent micromanaging the details of school systems.
- manage and analyze the information and data available to assist in decision-making.
- develop their own voice, as distinct from a superintendent or university president, and communicate well with the community.
- see their school as part of a larger public education continuum.
- value governance retreats for evaluation and goal setting, as well as ongoing training and improvement at the board level.

## 9. Master Check List

This Master Checklist summarizes many of the items addressed in this handbook, including broad policy development, management of data and information, key partnerships, and a communication strategy.

### Broad Policy Development

- Identify and periodically reaffirm the board's purpose, mission, and authorities.
- Create measurable goals and timelines for policy ends, not means.
- Identify existing policies that support the board's mission.
- Review the existing strategic plan or initiate efforts to develop a plan and policies designed to achieve the board's measurable goals and objectives.
- Analyze issues using research-based data from many sources.
- Include educational stakeholders in discussions about issues and policy making before decisions are framed or made.
- Invite the public to participate in issue oriented forums separate from board business meetings.
- Guide policy development by providing clear directions to staff, and adopting outcomes that are objective and measurable.
- Acknowledge individuals providing input.
- Establish and implement policy review cycles.
- Provide annual training for board members.

### Managing Data and Information

- Insist on the relevancy of information.
- Insist on balance in the amount of information.
- Understand who makes decisions and at what level.
- Understand the importance of the timing of information.
- Seek the sources of new ideas and innovations.
- Emphasize big picture perspectives.
- Employ systemic P-20 policy approaches.
- Cultivate an operational understanding of reform.

### Key Partnerships

- Identify a primary spokesperson for public policy issues.
- Develop a specific strategy for policy-level engagement with the administration/organization under board's jurisdiction.
- Adopt a clearly defined policy on how issues are directed to staff.
- Establish meaningful times and venues for interaction with the governor.

- Establish a process for regular communication with members of key legislative committees and their staff;
- Regularly transmit information regarding the board's activities to the legislature;
- Invite legislators or staff to the board's work sessions, and prepare briefings for newly elected legislators informing them of the board's mission, goals, and strategic plan (NASBE, 2000).
- Establish a process for communication and interaction with key education stakeholders, including unions, the business community, researchers, principals, professors, etc.
- Arrange meetings and schedules to facilitate inter-board dialogue and collaboration, including P-20 initiatives.

### **Communication**

- Select articulate, technically competent persons to facilitate effective board communications.
- Develop ability to reach the media on short notice.
- Prepare regular public service announcements on TV and radio on behalf of the board.
- Develop a summary of board actions or business for distribution by fax or email to the educational community, policy makers and decision makers.
- Develop a multi-layered email list-serve for board members, key administrative staff, district and school personnel, and policy makers.
- Adopt procedures consistent with the sunshine law for communications among board members.
- Adopt a meeting schedule of that minimizes conflicts with other educational policy boards.
- Adopt a strategy for regular contact with media representatives to ensure relationships are healthy and productive, as well as to make contact with new media people.

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### **Useful Links for Boards**

American Education Research Association (AERA):

<http://www.aera.net/index.html>

Association of Community College Trustees: <http://www.acct.org/>

Carver's Policy web page: <http://www.carvergovernance.com/>

Chronicle of Higher Education: <http://chronicle.com/>

Education Commission of the States: [www.ecs.org](http://www.ecs.org)

Education Week: <http://www.edweek.org/>

Hawai'i State Department of Education: <http://doe.k12.hi.us/>

Hawai'i State Board of Education:

<http://lilinode.k12.hi.us/STATE/BOE/HomePage.nsf?OpenDatabase>

Higher Education Links: List of Associations: <http://www.sheeo.org/helinks.htm>

National Association of State Boards of Education: <http://www.nasbe.org/>

National Center for Educational Statistics: <http://nces.ed.gov/>

National Governor's Association: <http://www.nga.org/>

The Council of Chief State School Officers: <http://www.ccsso.org/>

Stateline.org: News from the States: <http://www.stateline.org/>

UCLA's Advanced Policy Institute: <http://api.ucla.edu/>

University of Hawai'i: <http://www.hawaii.edu/>

University of Hawai'i Board of Regents: <http://www.hawaii.edu/admin/bor/>

Answers: Hawai'i Education Board Quiz: 1-b; 2-d; 3-a; 4-d; 5-d; 6-b; 7-d; 8-c; 9- c; 10-a.
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