

It starts in the Board Room



Experienced school leaders discuss school board governance and offer advice to new school board members

What do you wish you knew as a new board member?

► **Patrick Sherman:** I look back at my first year in 1991 and the thing that sticks in my mind is so much wasted time and effort in disagreement. I was elected in a very turbulent time in my school district. Lines were drawn between members, meetings lasted forever, and we ended in shouting matches too many times.

What I wish I knew then is that we need everyone on the same page to move the district forward. The majority rules, so you may lose on an issue but you just have to let that issue go and move on. Do not pre-judge someone because they are on the other side. You need to respect everyone's views. Listen closely to what they have to say on an issue. When a board listens to each other and treats each other with respect,

AST MONTH, NEW MEMBERS joined school boards around the state. The first couple of months of service is an important time to learn and grow as school leaders. Whether you are a new or experienced school board member, it's important to stay focused on school governance issues. In this special article, experienced school board members and former school administrators offer advice to new school board members and discuss important school governance issues.

SCHOOL BOARD PERSPECTIVE

WASB PEER MENTORS



Patrick SHERMAN
Genoa City /Lake Geneva UHS
WASB Peer Mentor



Larry DUX
Pewaukee
WASB Peer Mentor

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— Patrick Sherman

then you will move forward together as a team for the betterment of the district.

► **Larry Dux:** As a new school board member there is a lot of information that is given to you either in advance of winning the election or shortly after you are sworn in. The first thing you want to do is to meet with the superintendent and the board president to get an overview of your role as an individual board member, the role of the full board and the role of the superintendent. This will be helpful in understanding how you can be effective in your role while maintaining strong working relationships with the other board members and the superintendent.

The basics that would be covered in these overview sessions would be the structure of the school board meeting agendas, Robert's Rules of

Order, Open Meeting Law, an overview of board policies, and the board annual calendar and cycles for routine updates and budget requests. There are some topics like the school funding formulas and the specifics for your district (primary, secondary and tertiary aide) that will take time to fully understand and the district business manager will need to explain those to you. It will likely take a full year for you to become full versed in all aspects of being a school board member.

What can a new board member do to improve their governance and leadership skills?

► **Patrick Sherman:** To improve governance skills, a new board member needs to get to know their

fellow board members and listen to their opinions. Now, of course, you do not need to agree with every opinion and the new board member may have a stronger opposite opinion. If your fellow board members see that you respect them and really listen to them, they will do the same for you in return. You then can have frank and productive discussions on your school governance.

Guess what? By being elected you are now an educational leader in your community. That thought alone should make every new school board member want to improve their leadership skills. A new board member must be willing to put in the time and work to become a more productive leader. Read, watch WASB webinars and attend WASB functions. Be educated on issues on the board agenda before the meeting. If you

WASB PEER MENTORING PROGRAM

The WASB Peer Mentoring Program is a complimentary service for school board members — new and experienced. Whether you are new to the board, new to being a board officer or just would like an additional resource, WASB Peer Mentors are available for advice, support and guidance.

Mentors are available to listen to a board member's concerns and help them identify the problem.

Mentors can support a board member in understanding his/her primary role and responsibility, including:

- **Setting** a vision for the district,
- **Ensuring** accountability for the public,

- **Setting** district policies,
- **Providing** community leadership, and
- **Developing** effective board and superintendent relationships.

If you are interested in working with a Peer Mentor, visit wasb.org or contact Sheri Krause, WASB Communications Director, at skrause@wasb.org or 608-512-1705.

WASB Peer Mentors: Diana Bohman, Tomorrow River; Larry Dux, Pewaukee; Gabe Kolesari, Hamilton; Howard Kruschke, Saint Croix Central; Patrick Sherman, Lake Geneva; Tom Steiner, Trevor Wilmot (past board member); Gary Vose, Kettle Moraine



have questions on an issue, contact the district administrator before the meeting. Never try to show up the school staff at an open meeting. Lead by example.

► **Larry Dux:** The most significant things you can do to improve your governance and leadership skills are to develop respect and trust for the work that has been done by past board members and superintendents. It is easy to be critical of their decisions, but it takes time to fully understand the reasons for the decisions that were made and the factors that were considered.

If you have concerns or issues, it is advisable to ask questions so that you can learn about the issue and the work that was done. I would also encourage new board members to take full advantage of the educational offerings like the WASB Spring Workshops, and the Summer Leadership Institute. These educational programs are structured to help improve your knowledge and skills as well as provide opportunities to network with other school board members in your region and across the state. On a personal note, I found these sessions to be very valuable in my first year as a new board member and continue to attend as a WASB Peer Mentor.

How can experienced school board members help new board members?

► **Patrick Sherman:** The most important thing is to be welcoming to new members. Their vote counts as much as yours does. Thank them for stepping forward to serve their community. Answer their questions even if there are lots of questions.

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— Larry Dux

Listen to them like you expect them to listen to you. If you have been a board member for a number of years, it is good to have new views at the board table. Be open to some new ideas and give them a fair hearing at the board table. I believe all board members should be mentors to new board members.

Now, I have described a perfect situation and I know full well this does not always happen. That is why we have the WASB Peer Mentor program. We are available to answer your questions or just there to listen to you.

If you are a new member reading this, I welcome you to community service. I thank you for stepping forward to serve your community and I ask you to always remember to

enjoy the journey of your school board service.

► **Larry Dux:** The experienced board members on your board or from other school districts can be very helpful in providing some of the key information about the functions and roles of school board members as well as the “historical context” for past decisions. Some school boards may actually assign a fellow board member to serve as a mentor, but if your school district does not have a formal mentoring program, you can contact any of the individuals who have volunteered to serve as WASB Peer Mentors listed (*see bottom of page 11*).

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SUPERINTENDENT PERSPECTIVE



Rachel SCHULTZ
WASB Consultant and
former district administrator

How can superintendents help support new school board members?

► **Rachel Schultz:** Some new board members may not want additional help while others actively seek it. So it is up to the superintendent to determine how to respond to each person's needs. However, most new board members do not fully understand the

complexities of the organization, the number of decisions that need to be made, or the role of the board in making decisions. Therefore, the response is really quite simple — treat them like a new student.

Help them become familiar with the board meeting protocol and preparation for the board meeting. Help them understand the current goals and plans that are already in place. Explain decisions that the board makes versus those that administrators make. Guide them through local policies and practices. Encourage them to ask questions, especially before a meeting so they can better understand how the past may affect the current issues on the table. Welcome them into the office. Be open, honest, informative and friendly so each new board member wants to become part of the team. Really, it is very similar to how a teacher welcomes a new student into a classroom to make them feel comfortable and ready to participate.

As a former school administrator, what advice would you give to new school board members?

► **Rachel Schultz:** There are two parts to the answer to this question. The first part is to look internally and make sure you know yourself. Know your own beliefs, values and the reasons why you want to be part of public education. As a member of the board, you may need to explain how you voted or why you want more information on something that is before the board. Often it's easier to express yourself in public if you have a good understanding of yourself and your reasons for becoming a school board member.

The second part is external and involves decisions and issues brought before the board. It is a series of questions to ask yourself and they are similar to the questions a journalist uses — who, what, why, when and where. Although the specific questions can vary somewhat, the typical set of



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questions could be as follows: Who is affected by this decision (students, staff, public)? Why is this decision good for our students? What is the impact on the budget? When will this decision take effect (immediately or in the future)? Where does this decision help our vision, mission, goals or strategic plan? Ask these ahead of a board meeting, at the board meeting, or to yourself. The answers often help clarify the decision that is best for the district as a whole and should help reduce the amount of emotional discord that some issues bring forth.

SCHOOL BUSINESS MANAGER PERSPECTIVE



Roger PRICE
WASB Consultant and former
school business official

From the school business manager perspective, what should new school board members be cognizant of as they begin their service?

► **Roger Price:** School business/operations is concerned with a wide spectrum of disciplines including finance, facilities, technology, enterprise services such as food services, human resources management, general operations and basically anything that is outside of the instructional process. New board members should take time to understand the fundamentals of how the district functions and ensure that all the district's work is being addressed to facilitate the effective operation of the school district.

Every educational decision has an impact on the financial and operational capacity of the school district.

Communication is critical to ensure that everyone — from the school board to the district staff to the parents, taxpayers and media — understands how a decision reflects on the educational mission of the district, capacity of the district to be successful, and expectations of the community.

The school board is responsible for leading the district; for helping the community define a vision for education; for designing the structure of the organization; for defining the rules, roles and relationships it believes will move the system toward the vision; and for being accountable for the learning results of this effort. True accountability depends on open decision making, community engagement and support, and receptivity to new ideas and constructive criticism.

What school finance issues are important for new school board members to understand?

► **Roger Price:** Each district has its own unique set of circumstances that affect the district's fiscal position and flexibility.

- Revenue limits, which cap the resources available to the district, control approximately 85 percent

of the district's access to resources (property taxes and general state equalization aid), are based on historical spending, and are affected by changes in local membership.

- A district's student membership, property value per pupil, shared cost, guaranteed values, and other factors are the main criteria used to determine the amount of equalization aid a district will receive.
- In addition, changes in the revenue limit formula, allowable increases per student, and the amount of the legislative allocation to K-12 education impacts available resources to be shared among school districts.

The budgeting process is a team effort involving the school board, the superintendent, the business official (where applicable), other district staff, and the community — and each has an important role to play. It is a cyclical, continuous process throughout the fiscal year and occurs in phases that include planning; budget development; budget presentation and approval; administration of the budget; and continuous fiscal assessment. ■

WASB CUSTOMIZED LEADERSHIP SERVICES

The WASB provides comprehensive, customized training, support, resources and inspiration to school boards and superintendents to maximize their effectiveness in carrying out their respective leadership roles.

The WASB Customized Leadership Services can address a wide range of governance issues and/or help districts confront specific challenges and circumstances. From developing a vision and working on board-superintendent relations to developing a master plan, the WASB is here to help.

Frequently, districts discover that what they think is one issue is actually a combination of issues that requires a multi-faceted resolution. The WASB consultants have the ability to tap into a vast array of services and experience, putting them in a unique position to bring together a team of resources to address nearly any issue.

For more information on the WASB Customized Leadership Services, contact the WASB for a free consultation.