

To: Board Members  
From: Superintendent George Mendoza  
Re: July 14th & 15th Board/Superintendent Leadership Retreat  
Dixie Lund Boardroom EOU; Inlow Hall

Our first retreat is just around the corner and summer is in full swing, I know this is a busy time for many of you and your families; I certainly appreciate you all taking the time to meet with me so that we may learn and collaborate on how we can best support and serve La Grande School District. To get us started I have attached the following documents for you to review prior to our retreat in July.

I have attached the following documents for you to review prior to our Retreat In July.

**1. Please Read/Review**

- Chapter 2- The Superintendent and School Board relationship, from the book, *So Now You're the Superintendent*. This chapter provides insight into Superintendent thinking and how we, as a Board/Superintendent leadership team, may want to begin communicating and interacting to ensure a healthy and transparent relationship.
- *Superintendent's Transition Entry Plan & Goals*. This is a bit ambitious and we can agree to scale some things back; Be ready to share thoughts/feedback.

**2. Please complete:**

- Figure 2.2. We will discuss your individual thoughts and ideas in order to develop a collective protocol surrounding the substantive topics.
- The "True Colors" online personality questionnaire. We will have fun learning and sharing our results.

**3. Retreat agendas for July 14th and 15th.**

By the conclusion of the Superintendent/Board Leadership Retreat, participants will:

- Take part in activities intended to support a high-functioning Board-Superintendent team (True Colors© – Barrier Breaking Activities) .
- Discuss and reflect:
  - Upon work that was completed with George Murdock so that he can share/facilitate discussion around what he feels we should all understand and support in relation to the needs of La Grande that were established by the Superintendent search process.
  - On *Superintendent's Transition Entry Plan & Goals*: Agree on priorities, focus and expectations in order to develop performance targets and deliverables for year 1 evaluation schedule. Discuss District Strategic Plan for La Grande Schools

- Upon Characteristics of Effective School Board's; Develop and agree to a set of operating norms related to superintendent-board interactions and relationships based on a discussion activity surrounding the read-ahead.

*Collaboration, Common understanding on expectations and focused outcomes is the objective I am striving for. I look forward to spending time with you all and getting to know you better; I also look forward to us developing as a team, serving the community and striving to provide the best education possible to the students of La Grande.*

#### **Schedule of Activities:**

Day 1: Friday, July 14 3:30 p.m. – 7:30 p.m.	Day 2: Saturday, July 15 8:00 a.m. - 3:00 p.m.
3:30-4:30 -Welcome and review of learning objectives and retreat schedule. Introduction activity (True Colors survey & Barrier Breaking Reflection)  4:30- 5:30 p.m.- Discussion and Reflection with George Murdock  5:30- 6:00-Dinner  6:00- 7:00 p.m.- Discussion and Reflection with George Murdock (Cont.)	8:00-8:30 -Breakfast and Day 1 recap  8:30-9:30: Characteristics of Effective School Boards activity and discussion/What is my role on the Board/How Do we operate  9:30-11:30 -Develop Superintendent-Board operating norms and agreements (chapter 2 read-ahead- Review examples)  11:30-12:30 Lunch  12:30-2:00 Superintendent's Entry Plan review and discuss focus; expectations; evaluation process; performance targets & deliverables for next year; Discuss strategic plan concept  2:00-3:00 -Retreat review and next-step

# 2

## *The Superintendent— School Board Relationship*

### *A Cornerstone of Your Success*

*It seemed rather incongruous that in a society of super-sophisticated communication, we often suffer from a shortage of listeners.*

—Erma Bombeck

Ed, a seasoned superintendent of fifteen years, realized that his relationship with the board was going sour. It started with a negative evaluation in May and as winter approached board members were attacking him in board meetings regarding "poor communication and not doing his homework." The board claimed that without proper information it couldn't make decisions that were in the best interest of the students, staff, and community. One board member in particular accused Ed of "withholding" information in an effort to control the board. This board member went on to claim that Ed communicated with those who agreed with his philosophy and withheld data from those who desired to hold him accountable.

Does this sound familiar? Unfortunately, superintendents can often become victims of a poor relationship with their boards in the absence of purposeful planning. It sneaks up on them and before they know it, their job is on the line. As a new superintendent you will need to work hard to develop and maintain a good relationship with your board members, which oftentimes is a function of effective superintendent-board communication.

## ABOUT THIS CHAPTER

This chapter will focus on the relationship between you and your board, ways to start off on the right foot, and strategies and ideas to continue to build on your relationship as your superintendency unfolds. As you read the information in this chapter, pay particular attention to the following:

- The importance of "equal treatment" when working with board members
- The uniqueness of the superintendent-board chair/president relationship
- The basics of developing an initial relationship with your board members
- Strategies for addressing normal and emergency communications with the board
- Board standards and operating protocols

Keep your individual needs in mind as you review this chapter as well. Remember each district, board, and superintendent is different. Since your district and situation is unique, your success is based on the needs of your board and the strengths you possess as the school district leader. Carefully evaluate the strategies presented and select the ones that make the most sense for you and your situation.

## MANAGING THE SUPERINTENDENT-BOARD RELATIONSHIP

Strategies used to develop and sustain healthy, long-lasting relationships with school boards are manyfold. Most correlate to aspects of effective communication and therefore this is where we will spend the bulk of our time. We believe that relationships are likely most significantly impacted, positively or negatively, by the quality of the communication that takes place among the parties. In considering the nuances of managing the

superintendent-board relationship we have identified two areas that are of vital importance:

- Equal treatment of your board members
- Superintendent-board president/chair interaction

## THE IMPORTANCE OF EQUAL TREATMENT

Equal treatment of board members is the first lesson new superintendents must learn. A good time to concentrate on this concept with your board is at the very beginning of your superintendency. This time is commonly known as the "honeymoon" period where everyone is happy and communication seems easy. Normally you are not being bombarded with complex issues during this period and can work on the relationship. Slowly, as the year progresses, you may begin to establish relationships, receive requests, make decisions, or run into issues that put you in a precarious position with individual board members. As your tenure continues, if you are not purposeful in your approach, you may develop "allies" on the board as well as "detractors." If you have not addressed these issues upfront during your "honeymoon" period, you could be headed for trouble.

Since many new superintendents worked as principals or central office administrators before assuming the superintendency, they have only reported to one supervisor during most of their career. During the superintendent preparation process there was likely little, if any, training related to how one deals with establishing an effective board relationship. All of a sudden the new superintendent is serving a board that is charged with acting as one, but is really a group of individuals with different expectations, demands, and personalities. Individuals new to the superintendency must be aware of this job challenge and have a plan for establishing and sustaining an effective relationship with their board.

Board members themselves are often times not well prepared for this part of their role either. Even though board members in most states receive some training, they likely did not spend much time on the superintendent-board relationship or the impact of making individual demands. This may be the first time some of these individuals have served on a board of directors, and they are often pulled in competing directions as a result of the public involvement in education we talked about in Chapter 1. They may not have strategies for dealing with these constituent demands and want you, as superintendent or your staff, to be conducting individual research on them on a regular basis. The question is, how do you deal with these situations when they arise? How do you provide appropriate service to your board without showing favoritism or serving one member's needs over that of another?

In our work with superintendents and through our own experience in the position we have observed two significant ways in which equal treatment of board members can become a problem for the new superintendent. Although we will speak to each in greater depth below, the first relates to superintendents showing deference to particular individuals on the board, in essence developing an "inner circle." The second condition focuses on how the superintendent deals with individual board member requests for information and time.

### The "Inner Circle"

In our observation superintendents develop an "inner circle" of board members over time and typically without intention. These individual board members may be people the superintendent holds in high regard, or who are seen as prominent in the community. Superintendents tend to often agree with these board members and the board members tend to fully support the superintendent's initiatives. It is human nature to connect more frequently with those who we trust or feel support our initiatives. If we don't feel support from a board member, or if there is clear opposition, we, as human beings, will seek the refuge of those we perceive to be on our side. This tendency is both natural and dangerous. New superintendents don't typically start out intending to fall into this trap, but subtly, over time, as individual relationships build, it can happen. It may be that the superintendent has a special connection to a board member because of a common interest, or the board member may be highly complimentary of the superintendent's performance. Regardless, the condition can develop and its impact is often negative and dramatic. Not unlike the employee who observes favoritism taking place in their environment, board members will become aware of this state as well. Once this happens the superintendent's objectivity is compromised and his or her decisions are questioned. Board members on the outside of the "inner circle" will consider the superintendent's motive when decisions are made or initiatives are supported. Again, as subtle and unintentional as this condition may feel to the superintendent, it is deadly to his or her relationship with the remainder of the board.

### Addressing Individual Board Member Requests

School board members have backgrounds that are typically as diverse as the constituents they serve. Some will be retired community members who have time to thoroughly consume each board packet and communication from the district, while others will be individuals who oftentimes arrive at the board meeting late having just arrived home from a business trip. What this diversity means for you as superintendent is that some board members may be heavily involved in their work, calling you on a daily basis, while others will only contact you in case of emergency. The

important part to understand is that you will receive individual board member requests for information or time, but how you address those requests is pivotal to your success in maintaining a solid relationship with your entire board. What we have observed to be most effective in addressing this issue is to let your board know up front when you receive individual requests for information or time so that those requests and any accompanying data will be distributed to all. This has a threefold effect: (1) it curbs individual requests which board members might make without the knowledge of their colleagues; (2) it establishes "equal treatment" of all board members; and (3) it has the impact of reducing unmanageable requests which might take extensive time and effort by you or your staff.

Armed with knowledge of these potential pitfalls as a new superintendent, you can properly establish norms with your board early on. We spoke to addressing these issues during your "honeymoon period" and frankly, the earlier the better. Our experience is that these behaviors, especially individual board requests, will begin early on in your tenure and the sooner you develop a protocol for their resolution the sooner you can begin to establish a healthy superintendent-board relationship.

**Key Point #1:** Be aware of the fact that how you interact with individual board members and respond to their requests will set the stage for how you are perceived. Take care to establish patterns of equal treatment with your board.

Strategies to ensure equal treatment of all board members include the following:

- Monitor the attention and time you provide to your board members.
- Be overt about your goal to provide equal attention to board members; set a goal with your members and periodically revisit the goal to see how you are doing.
- Gather the perceptions of your board members through interviews and surveys to see if you are providing equal attention and communication to them.
- Ask your board president to talk with board members and gain their perceptions about the time you are spending with them; meet with your board president and talk about what he or she is learning as a result of these discussions.
- Remind board members about your feeling on the importance of equal treatment; ask them to provide you with feedback about your efforts and the strategies you have implemented.

Putting one or more of these strategies in place will help ensure you are treating all your board members in a similar manner. In the initial stages of your superintendency, you may find that a good way to ensure equal treatment is to communicate with each board member using the same methods. After you have become more established, you may find that doing the same thing for each member may not be to your benefit. Let's look at another side of equal treatment.

## WHEN IS EQUAL TREATMENT UNEQUAL?

You will find that providing equal time and attention to each board member will work in the short term, but as your relationship evolves you'll see each board member has slightly different needs, and you'll want to consider their specific needs as you continue to work with them. While this may be challenging, your treatment should *equally* meet the needs of all your board members. Let's see how Juanita started to meet the needs of her board members in the area of communication:

Juanita started her superintendency by working hard to make sure she provided each board member with equal time and equal information. As her relationship with them grew, she started to see that they had different levels of need. She met with each board member individually to find out what their needs were, and then began to change her strategies to better meet those needs.

Initially, she was calling her board chair on a daily basis and the other members on a weekly basis. Antonio, one of her board members, told her that she did not need to call as he could obtain his information from the Friday Update and the board packet. Jennifer, another board member, told Juanita that she too preferred not to receive a call.

Juanita normally delivered the weekly board informational packet personally to each member. Some of the board members wanted their packet delivered to their place of employment, while others preferred to have it delivered to their home. Juanita normally delivered the packet on Thursday afternoons. One board member explained to Juanita that he was normally out of town on Thursdays, so she could mail the packet to him since he wouldn't be able to review it until the weekend.

As Juanita made these changes she kept in contact with the members to make sure her efforts were working for them. In the end she met board members' needs but she did not do everything exactly the same for each board member. By meeting their needs and constantly monitoring her efforts, she was able to get high marks for her communication efforts with her board.



Keep in mind that Juanita's success was based on her ability to find out her board members' needs, and then design strategies to meet those needs. She also assessed her situation to make sure her ideas would work. Meeting individual needs can be a complex task, but well worth the effort. Ideas to guide you as you work to meet your board members' needs include:

- When working to meet board member needs in the areas of attention and communication, remember that you want to make sure each member feels equally important and informed.
- Before thinking about varying your techniques for board members, be sure you have established a good base of attention and information.
- Talk with your board members continuously to make sure your efforts are working for each and every one of them.
- If you begin to perceive that a member is feeling less important or less informed, find out the issue and make the necessary adjustments.

**Key Point # 2:** Consider the unique needs of individual board members when working to provide them with "equal treatment and information."

## **SUPERINTENDENT-BOARD CHAIR/PRESIDENT INTERACTION**

In most districts, if it is not recognized as policy, it is definitely part of the culture for the board chair/president to assume an elevated role from the other board members. After all, the chair or president of the board is seen as a leadership role within the board structure. This role may be clearly defined or more informal. One item that seems to be consistent across districts is that the superintendent is required to meet with the board chair/president regarding development of the board meeting agenda. Additionally, superintendents will, in most cases, informally communicate with the board chair/president regarding other topics of importance. Although, as mentioned in the previous section, it is important to communicate equally with all board members, by nature of the position you will communicate more frequently with the board chair/president. As such it is important to develop a separate set of communication standards for your interactions with this person.

The board chair/president may serve as a sounding board to the superintendent for district initiatives, or provide the superintendent with

guidance regarding communication with other board members. It is important to get clarity regarding the role of the chair/president during your initial meetings (or retreat) with the board. For your protection it should also be clear how the entire board "views" the relationship between the superintendent and the board chair/president. What powers are delegated to the chair/president by the board? What should be communicated to the entire board and what is communicated individually to the chair/president?

From our experiences, some new superintendents do not clarify this relationship and then fall victim to mismatched expectations. The most common problems involve other board members not believing in the leadership abilities of the chair/president and wanting to be more involved in the leadership of the board. Their issues with the board chair/president put the superintendent in the middle of a power struggle. The superintendent needs to help the board work through this kind of issue as their mediator, or utilize the services of an outside facilitator.

Another common problem we have seen is that one or more board members wants to "micro-manage" the operations of the district. These board members want all of the attention and informational details normally reserved for the superintendent-chair/president relationship. This is another situation that requires intervention to get members back on track.

**Key Point #3:** Do not leave role expectations with your board chair/president to chance. Assist the board in identifying/clarifying this important role and your responsibilities in the working relationship.

### Establishing Superintendent-Board Chair/President Interaction Norms

The initial expectations for your interaction patterns with the board chair/president may come from the board chair/president or other board members as well. You need to take the initial ideas and make sure all of the board members are involved in the final product. Conducting an open discussion with the entire board regarding the president's role and your relationship with him or her is a must. Most superintendents hold this discussion as part of the formal, open agenda. This provides a formal record of the discussion and ensures clear understanding of the expectations for everyone.

It is important to also remember that, especially for a newly elected board chair/president, they may not realize the importance of clarifying their role in relation to other board members. One of the greatest areas of

ension between board members comes in the form of a mistrust that begins with individual members feeling they are not included in the communication loop. It is incumbent upon you as a new superintendent to make sure this issue is addressed once a new board chair/president is elected. The same role clarification is crucial for boards that either may not have had the discussion in the past or for a board that may be dysfunctional in their formal operations.

Strategies for helping your board understand the importance of role clarification include the following:

- Use the consultant from the search firm that assisted in your placement to conduct a seminar with your board.
- Provide informational articles highlighting the importance of the clarification of the board chair/president role in relation to the board and superintendent.
- Meet informally with the board chair/president and board members to help them understand the importance of role clarification.
- Use a consultant from the state school board association to explain the importance of clarifying the board chair/president's relationship with the board and the superintendent.
- Use a member from another board that has credibility with your board to explain the importance of role.

### Keeping the Chair/President Relationship Productive

The superintendent-board chair/president relationship is one that demands considerable attention, time, and effort. In the following lists are productive strategies to both establish and maintain the relationship, as well as potential pitfalls that should be avoided.

Strategies for successful superintendent-board chair/president interaction include the following:

- Determine the frequency of communication desired by the board chair/president.
- Develop a standard related to when the board chair/president should be contacted regarding important situations/information.
- Contact the board chair/president in advance of developing the board agenda.
- Gain an understanding early of how the board views the role of the chair/president.
- Assist the board chair/president in developing and adopting tools for board self-evaluation.
- Be willing to serve as a sounding board for the board chair/president.

- Provide the board chair/president with ideas related to the superintendent evaluation process.
- Remember to always introduce the board chair/president when jointly attending meetings.

Pitfalls to avoid regarding superintendent-board chair/president interaction include the following:

- Forgetting to contact the board chair/president first when serious issues arise.
- Usurping the board chair/president's authority when making decisions, or dealing with the district's various publics.
- Failing to place the board chair/president (and other board members) in a position of importance when announcing district successes.
- Handling calls from board members related to board member conflict; rather, always refer these issues to the board chair/president.
- Engaging in negative gossip with the board chair/president about other board members.
- Taking action on an issue which the board chair/president promotes without the full involvement of the board.

The superintendent-board chair/president relationship is one of the most vital you will establish during your tenure. Most seasoned superintendents indicate that they talk with their board chair/president on a daily basis, therefore establishing a successful relationship from the beginning is of clear importance. As stated earlier, it is also significant to understand how the board corporately views the role of the chair/president and his or her interaction with the superintendent. Successful superintendents define these factors early with their boards, and thus enhance ongoing communication and trust.

**Key Point #4:** Keep in mind that the individual you will speak with most in the district is the board chair/president. Understand the complexity of this unique relationship and take the necessary steps to ensure success.

## THE BASICS OF BOARD COMMUNICATION

Sound and effective communication between the superintendent and the board is the foundation of a good relationship. In the Beginning Superintendent Study (BSS) mentioned in Chapter 1 (Gordon, in Chapman, 1997),

a mistake made by many new superintendents was offending school board members and not doing homework between board meetings. The authors provided a list of "offending behaviors" and "board meeting homework problems." They include

- recommending personnel actions involving staff that had special, long-term relationships with board members;
- being too optimistic about potential program implementation or not being completely honest about district problems;
- not paying close enough attention to the meaning and implications of board member voting patterns; board members who were outvoted sometimes represented major community groups and their wishes;
- failure to recognize the implications one negative vote and the lack of consensus had on a decision; the board member became alienated;
- failure of the superintendent to "equally inform" all board members related to issues and decisions;
- insufficient communication with board members between meetings;
- bringing new ideas forward in public board meetings without extensive discussion in advance with board members;
- lack of clarity regarding the roles of the superintendent and board chair/president, resulting in a poor relationship. (Gordon, in Chapman, 1997, p. 200)

Although avoiding all of these problems sounds intuitive, the devil is in the details regarding how the superintendent achieves a positive working relationship with his or her board. The bottom line is that the quality of the superintendent-board relationship is strongly correlated with the clarity and frequency of communication between the parties. Many of our colleagues report they spend a significant portion of their time each week in communication with their board members. Since the superintendency is a position that deals with an overwhelming number of people and amount of information in a given day, it is crucial that a plan for superintendent-board communication be developed as early as possible in your tenure. How is this plan developed? Normally, superintendents new to a district talk with their board chair/president and with individual board members in defining an effective communication plan. We recommend four basic components of the communication plan, which will be outlined as the chapter proceeds. These four areas are as follows:

- o What form of communication does each board member individually prefer?

- o Determine the forms of communication and frequency of contact you will use to keep the board informed.
- o Outline the role of the board chair/president in the communication process.
- o Establish standards that outline when board members will be contacted regarding emergency situations.

Let's see how one superintendent worked with her board to identify their informational needs and developed a communication plan:

Mary knew her board would want to have input into her communication plan. When she was hired, the board chair told the rest of the members that he would take charge of her initial orientation since she was starting in the summer and several board members would be in and out of town during this time period. Mary took advantage of the extended time her board chair was giving her and talked with him about his communication needs. As he talked, Mary took notes on a white board in her office. She reviewed these notes with her chair for clarity. She developed a draft of her communication plan for superintendent-board interactions.

Once she completed this task, she called individual board members and invited them to meet with her to gain perspective about their communication needs. She took notes and used these thoughts to refine her communication plan. She distributed her plan one final time to obtain board member feedback, made adjustments, and then brought the plan to the entire board for their eventual adoption.

Since Mary spent time up front working with her board to determine their needs, she has a clear understanding of their expectations regarding her communication with them. However, Mary normally goes one step further and communicates more than the board expects. She ascribes to the saying, "Underpromise and overdeliver." This belief pays big dividends for her with her board: On her yearly evaluation, she gets good ratings for her ability to communicate.

**Key Point #5:** The most important relationship you will need to nurture is the one between you and your board; you will need to put together a purposeful communication plan to build this relationship.

Since a high level of communication between a new superintendent and his or her board members is so crucial, and since many new superintendents are not accustomed to this high level of communication, we have provided a planning template in Figure 2.1. Use this template or adapt it to fit your unique needs.

Figure 2.1 Board Communication Analysis Template

This template has been designed to assist you as you begin to diagnose the general communication needs of your board. Think about the board as a whole when completing this template. Use the results of board member interviews, discussions with district staff, and a review of board minutes when answering the questions below.

How active does this board seem in the operation of the school district?

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What methods did the previous superintendent use to communicate with the board?

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What communication strategies were successful in the past? What strategies did not seem to meet their needs?

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What is the general availability of board members for communication during the work week?

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The template in Figure 2.1 is normally developed using information from a variety of sources and targets obtaining general information related to the board's communication needs. Figure 2.2 was designed to assist you as you consider the communication needs of individual board members.

**Figure 2.2 Individual Board Member Communication Needs Template**

This template has been designed with key questions you may want to ask your board members in relation to their communication needs.

1. What kinds of key information do you want to stay informed about in relation to the operation of the school district?

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2. What is your preferred method for receiving this information?

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3. What kinds of information would require me to contact you immediately? What kinds of information are you comfortable waiting to receive on a weekly basis?

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4. How would you feel about administrative staff members contacting you instead of me in some cases? What is the district's history related to administrator/school board communication?

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5. What thoughts/ideas do you have to help us achieve good two-way communication?

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What did you learn as a result of this interview and how can this information be used to design a good communication plan?

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## SUCCESSFUL COMMUNICATION: FORM AND FREQUENCY

Form and frequency related to board member communication varies by district and individual superintendent. The key is to develop an overall communication plan, but this is a step many superintendents do not embrace as they begin their new positions. As a new superintendent, you are on a sharp learning curve, expected to quickly understand the district's unique issues while at the same time meeting hordes of people, many wanting to bend your ear regarding an issue of political importance. New superintendents, in many cases, are overloaded by complicated demands and fail to take the time to develop a communication plan as described earlier. In the absence of a plan, many new superintendents randomly choose their communication strategy, often without establishing form or frequency.

### Forms of Communication

Once communication needs are identified, it is important to hone in on the methods or forms to be used. In Table 2.1 we provide an outline of a few communication methods and include the pros, cons, and common strategies employed with each. As you review this figure, evaluate the methods based on your comfort level and the needs of your board members.

Typically superintendents choose to communicate with individual board members using one of the four primary methods listed in Table 2.1: mail, phone calls, hardcopy, or face-to-face meetings. Each has its advantages and disadvantages, but in combination these methods allow superintendents to successfully communicate with their boards.

### Special Note About E-Mail Communication

In this day and age of e-mail communication the process of equal contact with board members has become much easier, but in most states your e-mail is part of the public record and thus can be open to review. Additionally, you need to remember that sending an e-mail to board members could take place in stages. In essence, you need to make sure that less than a majority (a quorum) receives your e-mail at one time so that if they reply, a violation of your state's open meeting law does not occur.

In Table 2.2 we have included a list of communication ideas and items to consider which can be used by superintendents. We include this list to give you a jump-start in the communication process with your board.

Although this list of ideas is not meant to be all encompassing, it does provide an opportunity for you to begin thinking about the day-to-day intricacies of your communication with the board. Superintendent-board communication is distinct with each superintendent and each board. The forms of communication used will vary based upon the unique character of the institution and the individuals involved.

**Table 2.1 Superintendent–Board Member Communication Methods**

Methods	Pros	Cons	Strategies
E-Mail	<ul style="list-style-type: none"> <li>• Easily produced</li> <li>• Efficient (in most cases takes less time than phone calls)</li> <li>• Preferred method by many individuals</li> <li>• Provides documentation of communication</li> </ul>	<ul style="list-style-type: none"> <li>• E-mail is part of public record</li> <li>• Some board members might see it as impersonal</li> <li>• Can be easily forwarded on to others (lacks confidentiality)</li> <li>• Limits opportunity for expanded conversation</li> <li>• Can violate open meeting laws if sent to all board members simultaneously</li> </ul>	<ul style="list-style-type: none"> <li>• Use as a method to communicate non-confidential information</li> <li>• Ask the school district's attorney for a confidentiality statement to place as a permanent footer on all outgoing e-mail messages</li> <li>• In initial individual meetings with each board member determine their preferred communication method</li> <li>• Can be used as periodic, scheduled communication strategy</li> </ul>
Phone Call	<ul style="list-style-type: none"> <li>• Provides quick feedback</li> <li>• Reasonably efficient</li> <li>• Offers personal touch to communication</li> <li>• Provides opportunity for expanded conversation</li> <li>• Allows for confidential conversation</li> </ul>	<ul style="list-style-type: none"> <li>• Require respondent's availability to establish communication</li> <li>• Not as efficient as e-mail, especially if multiple individuals are to be contacted</li> <li>• Hard to document content of conversation</li> </ul>	<ul style="list-style-type: none"> <li>• Establish preferred contact times with individuals and record for future use</li> <li>• Establish call log to confirm when conversations take place</li> </ul>
Hard Copy	<ul style="list-style-type: none"> <li>• Easily documented</li> <li>• Provides opportunity to include attachments without scanning</li> <li>• More formal than e-mail or phone communication</li> </ul>	<ul style="list-style-type: none"> <li>• Time consuming to develop and distribute</li> <li>• Reproduced easily (lacks confidentiality)</li> </ul>	<ul style="list-style-type: none"> <li>• Lends itself well to normal communication strategy (i.e., Friday update of the week's activities for the board)</li> <li>• Provide cover sheet with hardcopy communication indicating that some material may be confidential</li> </ul>
Face-to-Face Meeting	<ul style="list-style-type: none"> <li>• Most personal form of communication</li> <li>• Establishes rapport</li> <li>• Provides venue for expanded discussion</li> <li>• Provides greater opportunity to assess reaction to items being communicated</li> </ul>	<ul style="list-style-type: none"> <li>• Most inefficient method of communication, very time consuming</li> <li>• Can be difficult with detractors</li> <li>• Hard to document content of message</li> </ul>	<ul style="list-style-type: none"> <li>• Most effective when established as a communication method early in the superintendent's tenure</li> <li>• Best way to establish "equal time" standard, especially when meetings are conducted with each board member prior to board meeting to review agenda</li> <li>• In situations where important or difficult information is discussed, produce a summary of issues addressed and e-mail to individual as a way to document conversations</li> <li>• If, through expanded conversation, important issues are discussed or ideas generated, make sure to send an e-mail to other board members as a follow up to keep everyone in the loop</li> </ul>

**Table 2.2** Superintendent-Board Communication Ideas and Considerations

Communication Ideas	Items to Consider
<b>E-Mail Options:</b> <ul style="list-style-type: none"> <li>• Send out weekly school district update via e-mail.</li> <li>• Employ an e-mail communication system which provides updates to board members (and others) when the district's Web site is modified.</li> <li>• Use e-mail as a means to communicate efficiently during periods of crisis.</li> <li>• Utilize e-mail to prompt thinking related to a topic of importance prior to a board workshop.</li> <li>• Apply e-mail as a method to distribute general school board communication in an efficient manner.</li> </ul>	<ul style="list-style-type: none"> <li>• Be careful not to ask board members to make decisions via e-mail, which could be construed as conducting a meeting without public notice.</li> <li>• Keep in mind that e-mail is public information.</li> </ul>
<b>Phone Call Options:</b> <ul style="list-style-type: none"> <li>• Use phone calls to add emphasis to an important message (such as the district receiving an award, or to discuss a lawsuit which is pending).</li> <li>• Call board members to simply "check in" and see how they are doing, or to ask whether they have questions regarding anything that is going on in the district.</li> <li>• Contact board members via phone when you need to discuss personnel issues. Use of e-mail in this situation is inappropriate.</li> <li>• Consider district-provided cell phones for board members to enhance communication (this options will have its pros and cons).</li> </ul>	<ul style="list-style-type: none"> <li>• Always use phone calls to add a personal touch, but because of their time consuming nature, apply this form of communication purposefully.</li> <li>• Set the standard early on in your superintendency that phone calls will be used as one form of communication, but not likely the predominate form (realizing that for certain board members it might be the predominate form if they are not technologically proficient).</li> </ul>
<b>Hard Copy Options:</b> <ul style="list-style-type: none"> <li>• Send out hard copy of items which you want to guard against being widely distributed (mark as confidential).</li> <li>• Send out thank you cards or birthday cards to board members to further build relationship.</li> <li>• Use hard copy to communicate all legal documents.</li> </ul>	<ul style="list-style-type: none"> <li>• Over time move board members away from hard copy communication as they are cumbersome and inefficient.</li> <li>• Analyze which items are appropriate for hard copy communication and design a migration process for other documents.</li> </ul>
<b>Face-to-Face Meeting Options:</b> <p>Establish early on in your superintendency a regular timeline to meet with each board member to discuss the following questions:</p> <ul style="list-style-type: none"> <li>• As a district are we aligning our operations with our vision, mission, and goals?</li> <li>• Are we effectively measuring our performance against our vision, mission, and goals?</li> <li>• What are things you are excited about in the district?</li> </ul> <p>Identify things that require attention in the district. Prior to attending school events prepare yourself by thinking about what the three most pressing issues are at that point in the district. This will prepare you for discussion that is likely to take place with board members and others at these events.</p> <p>Use face-to-face meetings to communicate the most confidential of information.</p>	<ul style="list-style-type: none"> <li>• Identify other locally important issues to discuss during your face-to-face meetings with board members.</li> <li>• Always record in writing the outcome of face-to-face conversations with board members for future reference.</li> </ul>

### Frequency of Communication

Frequency of communication with board members can be broken down into two primary areas: emergency and normal communication. Emergency communication will take place periodically, but should follow the tenets of the communication plan that was discussed earlier. It is important to understand when communication should take place and surrounding which set of issues. Each board will see emergency communication in a different manner and thus this issue should never be taken for granted. As previously mentioned it is also important to understand the board president's role in the process of emergency communication.

With emergency communication, it is also crucial to understand how the superintendent can most efficiently and effectively make contact with individual board members. Some may want you to call their office, while others may not want any contact at their place of business. Certain board members may only be available via e-mail and others want to be contacted via cell phone. Regardless of the method, it is important to clearly understand how you will engage board members quickly and efficiently, especially in times of crisis.

Normal, ongoing communication is much more purposeful, but again should be borne out of the communication plan. It provides an opportunity to consider many different methods for planned, periodic communication, but as with emergency communication, should be a function of identified board member preferences. The goal of normal communication is much different than its counterpart in that it is aimed at providing information on an ongoing basis. Normal communication is very important to establish as it indicates your willingness to be open with the board. The board expects you to make normal communication a priority, but typically will be open regarding the methods you select. As stated earlier, the important issue is to develop a communication plan and dutifully stick to it.

**Key Point #6:** In the establishment of your communication plan, be sure to address communication forms and frequency.

### ESTABLISHING EFFECTIVE SUPERINTENDENT-BOARD CHAIR/PRESIDENT COMMUNICATION

The superintendent-board chair/president relationship is unique and requires special attention. Below, in Figure 2.3, we have provided an interview template for you to use when establishing communication guidelines with your board chair/president.

Figure 2.3 Board Chair/President Interview Template

This template has been designed with the key questions you may want to ask your board chair/president in relation to his or her communication needs.

Due to the unique nature of your position as board chair/president, what kinds of key information do you want to stay informed about in relation to the operation of the school district?

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How do you want to work together to develop the board meeting agenda?

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What is your preferred method for receiving this information?

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What kinds of information would require me to contact you immediately? How do you want to handle the notification of other board member related to this crucial information?

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What thoughts/ideas do you have to help us achieve good two-way communication?

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What did you learn as a result of this interview and how can the information be used to design a good communication plan?

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## EMERGENCY COMMUNICATION STANDARDS

From time to time, situations arise that require immediate communication and fast decisions. While these vary from district to district, the following list outlines some of the more common "emergencies" we have encountered in our work with superintendents that require immediate board contact:

- A bus accident
- A parent has gone to the media about a situation they are displeased about
- A fundraising drive has encountered a negative situation
- The death or severe illness of an employee
- The death or severe illness of a board member
- A board member has been arrested or accused of a crime
- An employee has been arrested or accused of a crime
- A former employee has been accused of a major crime
- A child has been abducted from a school
- An attempt has been made to abduct a child at a school
- An athletic team has been accused of a rules violation
- A water main has broken in one of the district buildings
- The heating system has failed in one of the district buildings
- School is being dismissed because of severe weather
- School is starting late because of severe weather
- A worker has been injured or killed while working on a district project
- Students have decided to protest at a local school
- Major vandalism has occurred in a district building

Most of these examples required that the superintendent immediately contact the school board. This contact is necessary so the board is well informed and not taken by surprise when members hear about the incident "out on the street." Develop minimum standards related to when you, as superintendent, should contact board members and, separately, the board chair/president (this is important because it could be different). Some boards may leave it to your discretion entirely, but we recommend working with your board to set some standards and procedures for emergency notification procedures. Figure 2.4 contains a template for your use in working with the board to design the parameters for emergency related communication.

**Key Point #7:** Be purposeful in designing a process related to when and how you will make contact with your board when emergency situations arise.

Figure 2.4 Emergency Communication Processes and Procedures

Use this form to plan the emergency communication parameters and procedures within your school district.

Situation	Board Contact Priority High = Immediate Medium = Within three hours Low = Next day	Preferred Contact Method (phone, face-to-face, e-mail, etc.)
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

## MAINTENANCE OF YOUR COMMUNICATION PLAN WITH THE BOARD

Even if you have put in the time to develop and implement a good communication plan, it is natural for issues and situations to arise that cause the plan to deteriorate. As circumstances and problems cause stress, as people become busy, as you and your board members begin to develop your own ideas, and as you naturally begin to talk with some members more than others, the chance for misunderstandings and a feeling of neglect can set in. This can be a critical time in the superintendent-board relationship and may require a "refocusing" or "refinement" of the original plan. In our work with superintendents and as we have served in the position, we have found that building in a barometer to gauge board member perceptions is vital. This information can be used to refocus or refine communication plans, which then have a much greater degree of success in maintaining positive relationships with board members. Those superintendents who do not regularly assess the perceptions of their board may not see the negative ideas held by some members. Disgruntled board members have been known to use their negative attitudes to build cases against their superintendents and ultimately turn the rest of the board members against them, similar to the situation faced by Ed at the beginning of this chapter.

**Key Point #8:** Periodically review the impact of your communication plan with your board members. Make the necessary adjustments and refinements to your plan and your strategies to maintain good superintendent-board relations.

## BOARD STANDARDS AND OPERATING PROTOCOLS

Once hired, smart superintendents typically go through an initial retreat process with their boards, in part to establish expectations, roles, and responsibilities. This is an important process as it provides everyone in the superintendent-board relationship the ability to get started on the right foot. Many new superintendents are afraid to engage in this process of setting expectations, as they don't want to address controversial topics early in their tenure. The problem is that if these items are not addressed early they are rarely discussed until a problem arises. One strategy to consider in addressing these topics is to ask either the search consultant who was engaged in your hiring process, or possibly someone from the state administrators' or school boards' association, to facilitate this retreat. In many



cases an "independent" third party can raise issues and discuss topics that would be uncomfortable for the superintendent or board to broach alone. Use of a third party can also lend credibility to this important process, which allows everyone to feel like they are "doing the right thing" in addressing these critical questions.

One subset of this discussion is a review of the board's ethics standards, or development of a board operating protocol. Personally we prefer the establishment of an operating protocol for several reasons. Board ethics standards are typically part of adopted school district policy and, at a maximum, are perused annually as part of the board's self-evaluation process. The problem is that although these ethics standards are likely well written and contain important information, their use has become pedestrian. A board operating protocol, on the other hand, can be adopted, or reaffirmed, each successive year as part of the board's reorganization and used on an ongoing basis, which calls attention to its significant tenets. It can also be reworked on an annual basis as issues arise which require attention. The board may also want to establish an intervention system as part of its operating protocol for members who violate its tenets. Sanctions that range from a verbal warning by the board president to censure, can be considered as a way to bring a level of importance to the process.

In Figure 2.5 we have provided an example of components included in a board ethics policy that can be adapted through the retreat process to serve the unique needs of your district.

Figure 2.5 Sample Ethics Standards

### Board Ethics Standards

- Attend all regularly scheduled board meetings insofar as possible, and become informed concerning the issues to be considered at those meetings.
- Recognize that decisions should be made only after discussion at publicly held board meetings.
- Render all decisions based on available facts and independent judgment, and refuse to surrender that judgment to individuals or special-interest groups.
- Encourage the free expression of opinion by all board members, and seek systematic communication between the board and students, staff, and all elements of the community.
- Work with other board members to establish effective board policies and to delegate authority for the administration of the schools to the superintendent.
- Communicate to other board members and the superintendent expressions of public reaction to board policies and school programs.
- Be informed about current educational issues by individual study and through participation in programs providing needed information, such as those sponsored by state and national school boards associations.

(Continued)

Figure 2.5 (Continued)

- Support the employment of persons best qualified to serve as school staff members, and insist on a regular and impartial evaluation of all personnel.
- Avoid being placed in a position of conflict of interest, and refrain from using board position for personal or partisan gain.
- Take no private action that will compromise the board or administration, and respect the confidentiality of information that is privileged under applicable law.
- Remember always that a board member's first and greatest concern must be the educational welfare of the students attending the public schools.

SOURCE: Found on the Arizona School Boards Association Web site at:  
<http://lp.ctspublish.com/asba/public/lpext.dll?f=templates&fn=main-h.htm>

Figure 2.6 Sample Board Operating Protocol

#### **Achievement Valley Public School Board Operating Protocol**

For the purpose of enhancing teamwork among members of the board and between the board and administration, we, the members of the Achievement Valley School Board, do hereby publicly commit ourselves collectively and individually to the following operating protocol:

- Surprises to the board or the superintendent will be the exception, not the rule. There should be no surprises at a board meeting. We agree to ask the board chair or the superintendent to place an item on the agenda instead of bringing it up unexpectedly at the meeting.
- Communication between staff and the board are encouraged. However, board requests that will likely require considerable time or have political implications are to be directed to the board chair and/or superintendent. All personnel complaints and criticisms received by the board or its individual members will be directed to the superintendent.
- The last stop, not the first, will be the school board. We agree to follow the chain of command and insist that others do so. While the board is eager to listen to its constituents and staff, each inquiry is to be referred to the person who can properly and expeditiously address the issue.
- As a parent, a board member retains the right to express his or her own personal opinions in verbal and/or written form.
- A board member will not "solicit an issue," become a "ball carrier" for others, or work around administrative employees and will encourage others to present their own issues, problems, or proposals in a constructive manner.
- The board will emphasize planning, policy making, and public relations rather than becoming involved in the management of the schools.
- The board will address its behavior by yearly self-evaluation and by addressing itself to any individual problems, such as poor meeting attendance or leaks of confidential information.

The board will set clear goals for themselves and the superintendent. The board and superintendent will set clear goals for the Achievement Valley Public Schools.

The superintendent is the chief executive officer and should recommend, propose, or suggest on most matters before the board.

Individual board members do not have authority. Only the board as a whole has authority. We agree that an individual board member will not take unilateral action. The board chair will communicate the position(s) of the board on controversial issues.

When board members serve on various school committees their role shall be defined by the board as silent observer or active participant.

Conduct at a board meeting is very important. We agree to avoid words and actions that create a negative impression on an individual, the board, or the district. While we encourage debate and differing points of view, we will do it with care and respect to avoid an escalation of negative impressions or incidents. Individual members may disagree with a board action, but will support the decision of the board as a whole.

To be efficient and effective, long board meetings must be avoided. Points are to be made in as few words as possible; speeches at board meetings will be minimal. If a board member believes he or she doesn't have enough information or has questions, either the superintendent or the board chair is to be called before the meeting.

Board meetings are for decision making, action, and votes, not endless discussion.

We agree to "move the question" when discussion is repetitive.

The board will not play to the audience. We agree to speak to the issues on the agenda and attend to our fellow board members. Facts and information needed from the administration will be referred to the superintendent.

The board will represent the needs and interests of all the children in the Achievement Valley Public Schools.

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Board Chair

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Board Member

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Board Member

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Board Member

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Board Member

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Date

## WHO HAS AUTHORITY FOR WHAT: THE BOARD AND SUPERINTENDENT AS A TEAM

A question often asked by board members and superintendents is, "What is the role of the board versus the role of the superintendent in the operation of the school district?" The age-old statement that the board sets policy and the superintendent administers that policy would seem to indicate a very distinct and clear dividing line between the respective roles of each. That division, however, is not always so clear nor is it one upon which everyone involved agrees.

Board members are usually "doers"; they operate businesses, they run homes, they dig ditches, they buy supplies. "Doers" often find it hard to look at the big overall picture and make decisions that cause other people to "do" the job. Many times they are tempted to get in and "do" the job themselves. Conflict situations arise when the board and the superintendent have not defined their specific roles within the district.

Because the needs of a district vary, and because leadership and management styles are different, there are no universal answers to "who has the authority for what." The real need in each district is for the board and superintendent to decide what each is to do and establish proper procedures and policy that will lead to the performance of those duties.

Board members, as they make decisions and find themselves involved in the business of the district, should ask themselves: Are we providing leadership to the superintendent and staff and establishing policy for the district or have we stepped into the role of the administration? Superintendents should ask themselves: Am I providing leadership to the board in pointing out areas where policy is needed, or am I usurping the board's responsibility by establishing policy? Worse yet, am I forcing the board to make administrative decisions because I don't want to take responsibility?

Keeping roles clear and communication open is the key to good superintendent-board relations. In Table 2.3 a chart listing the possible division of roles and responsibilities between the board and superintendent is provided.

Consider the following tips regarding board standards and operating protocols:

- Superintendents either conduct a retreat or ask a third party to meet with the board early in their tenure to discuss expectations, roles, and responsibilities.
- Board standards, which are located in policy, are typically well written, but not reviewed with any frequency.
- Board operating protocols lend themselves to annual review, ongoing use and needed revision. Board member signatures should be included in an effective board operating protocol.

Table 2.3 Typical Roles/Responsibilities of the Board and Superintendent

Task	School Board Role/ Responsibility	Superintendent Role/ Responsibility
1. Policy	Adopts	Implements and suggests
2. Meetings	In charge of	Serves as a resource person
3. Budgets/Finance/ Audits	Adopts and monitors	Prepares, administers, monitors details
4. Instruction	Establish criteria, approves and monitors	Recommends, oversees staff's efforts
5. Personnel	Establishes criteria, approves or rejects	Interviews, recommends, hires, evaluates, promotes staff development
6. Facilities/ Transportation/ Food Services	Develops policy on use of facilities, transportation, food services	Implements policy, writes rules and regulations, makes recommendations
7. Community Relations	Creates a positive image for district	Creates a positive image for district, directs communication
8. The Board and Superintendent	Hires the superintendent, establishes expectations, evaluates	Works at the pleasure of the board, is chief executive officer of the district

SOURCE: Adapted from the Nebraska Association of School Boards.

- Board operating protocols are most effective when they include board member designed interventions for violations of the protocol.

## SUMMARY

Chapter 2 we have examined the crucial relationship between the superintendent and the board. This relationship is one of the most important to our career and ultimately the stability and success of the school district. As you prepare to start working on the ideas and strategies you feel will help establish and maintain a good relationship with your board, think about the following questions that highlight the information presented in this chapter:

- How can you determine the board's culture related to the superintendent-board relationship?
- How will you address the necessary aspects of communicating with your board?
- Why is it important to define the role of the board chair/president and get the entire board to agree on your unique relationship with this person?
- Why are board operating protocols an important part of your superintendency?
- How can you treat each board member equally and meet their unique needs?
- At what point will you develop a superintendent-board communication plan?

Having a good relationship with your board members is not impossible, but it does take work on both your part and theirs. Superintendents who nurture this relationship tend to have stability in their district and are able to work through issues in a positive and productive manner. Those who don't put much time in building relationships with their board members or see it as a burden could be headed for trouble. We hope you have discovered some good ideas in this chapter that will help you as you work to build positive relationships with your board members.

In Chapter 3, *Organizational Trust and Culture: What Every Superintendent Should Know*, we move beyond building a relationship with your board and focus on ideas to help you work with your staff and the community. From our experiences, those superintendents that are able to develop trusting relationships with their staff are headed for success and smooth operations; those who try to move forward without these key components run into land mines on a consistent basis.

# **SUPERINTENDENT'S TRANSITION ENTRY PLAN & GOALS**

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## **La Grande School District**

Proposed by:  
George Mendoza  
Superintendent of Schools

# **La Grande School District**

## **Superintendent's Transition Entry Plan**

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### **Purpose**

The purpose of the Superintendent's Transition Entry Plan is to provide a roadmap for the direction of the school district. This road map will be created through deep analysis of information gathered through listening sessions. This information will guide the Superintendent's work plans and will inform staff during the development of the La Grande School District Goals and Action Plans.

Listening and learning sessions will dominate Phase I. The sessions will consist of numerous meetings with district leadership and district office support staff, as well as external leaders, including other area superintendents and community leaders, school principals and administrators, professional associations, leadership groups, student advocacy groups, parent groups and community organizations.

Reflection and the analysis of data collected and of anecdotal information gathered will guide Phase II, in which we will verify assumptions and identify the "gaps" in our programs. Those deficiencies and challenges that generate a sense of urgency and merit our full attention will become "catalysts" for change during the Superintendent's tenure.

Leading will dominate the final phase of the Transition Acceleration Plan culminating with the development of a La Grande School District Strategic Plan. This Strategic Plan will have holistic goals and Action Plans to achieve these goals. The series of explicit Action Plans will be presented to the Board of Education and to the La Grande community. These Action Plans will serve as tactical blueprints; roadmaps to improve the level of academic achievement of all students and to firmly establish internal operating, reporting and accountability systems. These Action Plans will also serve to support and enhance, when necessary, the La Grande School District's approved Improvement Plans. The Improvement Plans will become the guiding documents for our focused efforts to improve continuously.

Lastly, it should be noted that the successful transition of the Superintendent will occur simultaneously with the responsibility of operating the school district. The Superintendent's duties and responsibilities associated with the daily operations and problem-solving are in full course while the entry plan takes place.



## **Planned Activities and Primary Purpose**

### ***La Grande School Board***

Purpose: Establish a strong working relationship with each individual member of the Board and build a cohesive governance team with a common purpose.

### ***District and Site Administrators***

Purpose: Establish strong professional relationships with key personnel inside the District and begin to assess the strengths and needs of the leadership team.

### ***Faculty and Support Staff***

Purpose: Establish strong and collaborative relationships with each of the District's professional associations and groups of employees.

### ***Community Leadership***

Purpose: Meet civic leaders, business leaders, non-profit foundation leaders, neighboring school district leaders, law enforcement and parent organizations to generate good will, restore confidence in our mission, solicit and build support, establish communication channels, and lay the groundwork to begin strategic planning.

### ***Political Leadership***

Purpose: Meet local and state political leaders and establish means for regular communication.

### ***District Tour and School Visitations***

Purpose: Understand the District's neighborhoods, demographics, history, culture, context to understand the differences between the District's schools.

### ***Local Media***

Purpose: Articulate goals clearly, explicitly, and early so that the public, the press and the education community know what to expect. Generate publicity and awareness for initial "listen and learn" efforts. Demonstrate the sense of urgency behind the successful completion and initial implementation of a District strategic plan and successful execution of Board goals.

### ***Student Leadership/Student Voice***

Purpose: Meet with diverse student groups to understand the student perspective of our school system.

## Goals and Objectives

Phase I: Transition & Introduction: Understanding the Context, Intentional Engagement, Listen & Learning, Active Participation and Getting Involved;  
July 2017-October 2017

Phase II: Building Momentum: Continued Listening & Learning; Collect and Organize Data from stakeholder meetings; Stay visible; Implement surveys and gather data; Work on Establishing Credibility  
October 2017-December 2017

Phase III: Engagement & Planning: Ideas to Support Goal Setting and Strategic Action Plans for the Future;  
January 2018-April 2018

Listening and learning sessions will dominate Phase I. The sessions will consist of numerous meetings with District staff, school site leaders, community leaders, community organizations, professional associations, parent organizations and students.

Inquiry, reflection, and the analysis of data and qualitative information gathered will dominate Phase II, in which we will verify assumptions and identify the “gaps” in our programs. Those deficiencies and challenges that generate a sense of urgency and merit our full attention will become “our work” and the “catalysts” for change during the Superintendent’s tenure.

Future Focus will dominate the final stage of the Transition/Entry Plan culminating with collaborative review of current district goals and action plans; Goal will be to share information gathered and work in partnership with district stakeholders to develop future vision and direction for La Grande School District. This will inform district goals and action plans. With Board approval; Superintendent will begin the process of creating a District Strategic Plan. This plan will be comprised of a series of holistic goals with explicit Action Plans presented to the School board and the La Grande community. There will be a Strategic Planning team that will be comprised of community members, parents, District and school staff, and Board members. The team will set the strategic direction for the District by articulating the District’s mission, goals and focus areas as it strives to increase the achievement of all students. A clear and focused plan is critical to communicate District priorities to all stakeholders, this will serve as a roadmap to success and to help to align efforts toward a common, student-centered outcome. The La Grande School Board has final approval of the Strategic Plan.

## **Goal 01: Our Compact**

**Ensure effective District governance through positive productive Board – Superintendent relationships.**

### **Objectives:**

- Establish the Board and Superintendent as a cohesive governance team with a singular agenda on improving the achievement of all students.
- Build positive, productive and trusting working relationships with the Board members and individuals.

### **Intended Activities:**

- Meet with the Board Chair and Vice Chair to schedule Board/Superintendent retreat.
- Establish clear understanding of roles, responsibilities, expectations and systems for mutual accountability.
- Establish clear understanding of Board/Superintendent protocols.
- Establish regular meeting times with the Board Chair and Vice Chair for reviewing Board Agendas.
- Establish regular meetings with each Board member for one-on-one conversations and perspectives.
- Establish superintendent evaluation process, procedures, timelines and goals.
- Establish regular communications systems with the Board.
- Schedule Board retreats and workshops.

## **Goal 02: Connections**

**Build public trust and confidence through open and honest communication and positive relationships among stakeholder groups.**

### **Objectives:**

- Increase personal knowledge and understanding of the various regions and neighborhoods within the La Grande School District.
- Establish positive relationships with District leadership and meet with all district office and school staff to validate each as individuals who are critical to the District's success.
- Communicate with parents and encourage positive partnerships on behalf of students.
- Establish a positive, professional and collaborative relationship with school district professional associations and labor groups.
- Connect with the political leadership in the city, county and state to forge clear lines of communications, advocacy, and support for District students.
- Connect with EOU; look to understand relationship and look for collaboration and partnership so that we can work cohesively as a K-22 system.
- Establish positive working relationships with members of the business community, leadership service groups, support and non-profit agencies in the community.
- Increase opportunities to promote the District's image within the community and enhance advocacy for the District's needs and mission.
- Determine the effectiveness of internal and external communication processes.
- Continue to expand the District's open and positive relationship with the media.
- Establish a relationship with the student leaders at each of the middle and high schools.

### **Intended Activities:**

- Identify the community's business leaders, civic leaders, foundation leaders and educational leaders and their respective affiliation with the school district.
- Attend and participate in key city and county committees.
- Attend meetings of key organizations such as the Chamber of Commerce, Kiwanis and service/civic clubs/organizations for initial listening and learning sessions. Establish routine communications protocols with these groups.
- Become of member of self-selected service/civic/social clubs/organizations.

## Goal 02 - continued

- Schedule meetings with the established parent organizations for initial listening and learning sessions. Establish regular meetings and communications with these organizations.
- Schedule meetings with each employee associations' leadership group for initial listening and learning sessions. Establish regular meetings and communications with these groups.
- Schedule meetings with established student leadership groups for initial listening and learning sessions. Establish regular meetings and communications with these organizations.
- Schedule regular visitations to all District schools for the purpose of interacting with students (lunch, breaks, extracurricular and athletic events).
- Assess the quality, quantity and effectiveness of all existing forms of communication with various stakeholders.
- Assess internal and external communications, and the roles of staff, Superintendent and Board of Trustees in each of these domains.
- Write letters/articles to various stakeholders, using direct and media-facilitated communication expressing my goals, expectations, hopes and plans for continuous improvement for our schools, students and community.

## **Goal 03: Execute**

**High expectations and increased student achievement for all students.**

### **Objectives:**

- Analyze patterns in student achievement data and the gaps in achievement between/among identifiable groups of students to determine an appropriate course of action for improving instruction and learning.
- Engage parents as primary supporters of their child's academic achievement.
- Establish formal and informal internal and external monitoring and evaluation designs for instructional support and intervention systems.
- Understand current strategies, strengths and opportunities for improvement in the District's instructional program.
- Understand and assess the current goals and action plan in place for the District and school sites to meet student performance goals.

### **Intended Activities:**

- Meet with the Admin team to discuss the performance of District schools to assess the quality of actions proposed for continuous improvement of schools.
- Meet with site principals/assistant principals to analyze and review the instructional program, practices, curriculum and support materials for evidence of effectiveness in improving student achievement.
- Review student data for all populations.
- Review district curriculum, instruction and assessment for high expectations, alignment to standards, and appropriate instructional modifications for students in English Language Learner programs and for students with special needs.
- Complete visits to District classrooms to observe the current state of teaching and learning in the District.
- Review the scope of interventions considered, attempted or in place at all our campuses.
- Assess which District schools need additional support due to variance in student demographics and provide an action plan to provide this support.
- Review and analyze the District's student information system(s), monitoring systems and evaluation systems for effectiveness and accountability in terms of how the data enhances instructional decision-making.

Goal 03 — continued

- Review the District's professional development plan.
- Develop a plan to increase parent participation in their child's education.
- Utilize a common theme in all District communications, effort and actions.
- Connect all Board goals & Action Plans to the priorities and goals identified to the District Strategic Plan.

## **Goal 04: Excellence by Design**

**Increase organizational effectiveness, efficiency and accountability.**

### **Objectives:**

- Assess and determine departmental alignment within the organization to ensure a student-centered agenda.
- Consolidate and streamline similar functions in order to maximize service and support to schools.
- Establish cohesive and focused District office & Administrative team.
- Understand the District's Facility Master Plan.

### **Intended Activities:**

- Review all critical documents:
  - Board policies and administrative regulations
  - District Instructional Plans
  - Employee handbooks
  - Student achievement by school
  - Financial projections and budget processes
  - Alignment of standards, curriculum, assessment and professional development
  - Legal proceedings and settlements
  - Accountability plans and processes
  - Facilities utilization, plans and projects
  - Safety and emergency plans
- Request an assessment of current status from each department, an analysis of the critical work priorities for the upcoming year and the proposed plan of action for each.
- Establish a schedule to meet with all administrators and key staff.
- Conduct organizational analysis.
  - What do we need to start, stop and continue doing?
  - How can each department be supportive of improvement in student achievement?
  - What support is needed to be successful?
- Review and assess the district office structure to enhance workflow and redirect, where appropriate, service delivery to continue improvement of school sites.
- Establish accountability measures and determine data to be collected, reviewed and analyzed each quarter.
- Incorporate appropriate technology throughout all levels of the organization.
- Review funding streams supporting each area of District operations and reassess ways to maximize support for our schools.



## **Goal 05: Safe Harbor**

**Establish clear and definitive strategy to address issues related to school safety, security, and climate for all schools.**

### **Objectives:**

- Increase student attendance, and thus achievement opportunities, by decreasing tardiness, absences, and truancy.
- Connect school safety, security, climate perceptual data and quantitative data to existing strategies to determine gaps.
- Understand established enforcement of policies and practices related to student conduct and discipline.

### **Intended Activities:**

- Staff to brief Superintendent on existing student attendance, tardiness, suspension, expulsion and truancy data, policies, regulations and practices.
- Staff to brief Superintendent on overlapping District, law enforcement, social services and other agency related action to aforementioned item.
- Design and implement an attendance campaign, if necessary.
- Conduct organizational analysis
  - What do we need to start, stop and continue doing?
  - How can each department be supportive of dramatic improvements in student achievement?
  - What support is needed to be successful?



## Figure 2.2 Individual Board Member Communication Needs Template

1. What kinds of key information do you want to stay informed about in relation to the operation of the school district?
  
2. What is your preferred method for receiving this information?
  
3. What kinds of information would require me to contact you immediately? What kinds of information are you comfortable waiting to receive on a weekly basis?
  
4. How would you feel about administrative staff members contacting you instead of me in some cases? What is the district's history related to administrator/school board communication?
  
5. What thoughts/ideas do you have to help us achieve good two-way communication ?

From page 44, *So Know You're the Superintendent*



## True Colors Survey:

Instructions: Compare all 4 boxes in each row. Do not analyze each word; just get a sense of each box. Score each of the four boxes in each row from most to least as it describes you: 4 = most, 3 = a lot, 2 = somewhat, 1 = least.

Row 1	<b>A</b> Active Variety Sports Opportunities Spontaneous Flexible	<b>B</b> Organized Planned Neat Parental Traditional Responsible	<b>C</b> Warm Helpful Friends Authentic Harmonious Compassionate	<b>D</b> Learning Science Quiet Versatile Inventive Competent
	Score <input type="text"/>	Score <input type="text"/>	Score <input type="text"/>	Score <input type="text"/>
Row 2	<b>E</b> Curious Ideas Questions Conceptual Knowledge Problem Solver	<b>F</b> Caring People Oriented Feelings Unique Empathetic Communicative	<b>G</b> Orderly On-time Honest Stable Sensible Dependable	<b>H</b> Action Challenges Competitive Impetuous Impactful
	Score <input type="text"/>	Score <input type="text"/>	Score <input type="text"/>	Score <input type="text"/>
Row 3	<b>I</b> Helpful Trustworthy Dependable Loyal Conservative Organized	<b>J</b> Kind Understanding Giving Devoted Warm Poetic	<b>K</b> Playful Quick Adventurous Confrontive Open Minded Independent	<b>L</b> Independent Exploring Competent Theoretical Why Questions Ingenious
	Score <input type="text"/>	Score <input type="text"/>	Score <input type="text"/>	Score <input type="text"/>
Row 4	<b>M</b> Follow Rules Useful Save Money Concerned Procedural Cooperative	<b>N</b> Active Free Winning Daring Impulsive Risk Taker	<b>O</b> Sharing Getting Along Feelings Tender Inspirational Dramatic	<b>P</b> Thinking Solving Problems Perfectionistic Determined Complex Composed
	Score <input type="text"/>	Score <input type="text"/>	Score <input type="text"/>	Score <input type="text"/>
Row 5	<b>Q</b> Puzzles Seeking Info Making Sense Philosophical Principled Rational	<b>R</b> Social Causes Easy Going Happy Endings Approachable Affectionate Sympathetic	<b>S</b> Exciting Lively Hands On Courageous Skillful On Stage	<b>T</b> Pride Tradition Do Things Right Orderly Conventional Careful
	Score <input type="text"/>	Score <input type="text"/>	Score <input type="text"/>	Score <input type="text"/>

<b>Total Orange Score</b> A H K N S <input type="text"/>	<b>Total Green Score</b> E F J O R <input type="text"/>	<b>Total Blue Score</b> C G I L P <input type="text"/>	<b>Total Gold Score</b> B D M T <input type="text"/>
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If any of the scores in the colored boxes are less than 5 or greater than 20 you have made an error. Please go back and read the instructions.



## **Greens**

- Are innovative and logical
- Seek to understand the world
- Need to be competent
- Require intellectual freedom
- Are curious
- Question authority
- Push themselves to improve
- Seek perfection in play
- May become intellectually isolated
- Are slow to make decisions
- Value concise communication
- Look for intellectual stimulation
- Enjoy intriguing discussions
- Are sometimes oblivious to emotions
- Are detached
- Believe work is play
- Are drawn to technical occupations
- Analyze and rearrange systems
- Focus on the future
- Bring innovation to society

## **Oranges**

- Are free and spontaneous
- Are impulsive risk-takers
- Are active
- Are optimistic
- Resist commitment
- Can become virtuosos
- Thrive on crises
- Are drawn to tools
- Like to be the center of attention
- Have great endurance
- Are drawn to action jobs
- Need variety
- Are dynamic, animated communicators
- Are competitive
- Deal with the here and now
- Are bold in relationships
- Are generous
- Have difficulty finding acceptance
- Like to live in a casual atmosphere
- Bring excitement to society

## **Gold**

- Are dutiful and stable
- Need to be useful
- Want to be self-sufficient
- Value organization
- Desire punctuality
- Schedule their lives
- Make and keep commitments
- Measure worth by completion
- Are goal-oriented
- Value rules
- Prepare for the future
- Are inclined to join groups
- Believe work comes before play
- Safeguard tradition
- Prefer order and cleanliness
- Are responsible and dedicated
- Are drawn to respected occupations
- Enjoy positions of authority
- Desire structure
- Bring stability to society

## **Blues**

- Are in search of themselves
- Need to feel unique
- Must be true to themselves
- Look for symbolism
- Value close relationships
- Encourage expression
- Desire quality time with loved ones
- Need opportunities to be creative
- Compromise and cooperate
- Nurture people, plants and animals
- Look beyond the surface
- Share emotions
- Make decisions based on feelings
- Need harmony
- Are adaptable
- Are drawn to literature
- Are drawn to nurturing careers
- Get involved in causes
- Are committed to ideals
- Bring unity to society





## Administration

- There are groups of words in horizontal lines across the page, lettered from A to T.
- The administrator instructs students to rank the groups of words from 4 to 1, 4 being most like them and 1 being least like them.
- After they have ranked each horizontal line of word groups, there is a scoring system provided.
- A group of letter is provided for each "true color." The test-taker will add up the numbers of the listed letters (word groups) and the color with highest number is their "true color."
- There is then a list of "true color" characteristics that each color represents.
- If students get a tie, their "true color" will be a combination of the two.

## Pricing & Availability

The True Colors Inventory is available in many different places at many different costs. True Colors International offers a package for taking the test online and receiving personalized results for \$34.95. This site also offers training for individuals and groups, workshops on several topics, and the option to become a Master Trainer. The inventory is also available in print form on several websites, such as the one listed below. The inventory is readily available and can be found in many different formats.

True Colors International

<https://truecolorsintl.com/assessments/online/>

<b>Reliability</b> <ul style="list-style-type: none"><li>• highly reliable with a test-retest coefficient of 0.94</li></ul>	<b>Validity</b> <ul style="list-style-type: none"><li>• significant content validity after comparison with MBTI and DiSC</li><li>• significant construct validity</li></ul>
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# LA GRANDE SCHOOL DISTRICT #1

## SPECIAL BOARD MEETING BOARD/SUPERINTENDENT RETREAT (DAY 1)

July 14, 2017, 3:30 p.m., E.O.U, Inlow Hall

**NOTE:** The meeting location is accessible to persons with disabilities. A request for an interpreter for the hearing impaired or for other accommodations for persons with disabilities should be made at least 48 hours in advance of the meeting to Gaye Young at (541) 663-3202.

<u>ITEM</u>	<u>RESPONSIBILITY</u>
<b>1.0</b> <u>CALL TO ORDER:</u>	<b>Board Chairman</b>
1.1 Pledge of Allegiance	
1.2 Roll Call	
1.3 Review of Agenda	
<b>2.0</b> <u>PUBLIC FORUM</u> (limited to 30 minutes)	
Individual comments limited to three minutes. If more time is required, please submit comments or questions in writing. At this time, members of the public are invited to present concerns to the Board. The chairman may allow input after board motions are made and seconded. Speakers may offer objective criticism of school operations and programs, but the Board will not hear complaints concerning individual school personnel. The chairman will direct complaints to the appropriate means for Board consideration and disposition of legitimate complaints involving individuals.	
<b>3.0</b> <u>BOARD RETREAT</u>	
<b>3:30-4:30 p.m.-</b> Welcome and review of learning objectives and retreat schedule. Introduction activity (True Colors survey & Barrier Breaking Reflection)	
<b>4:30-5:30 p.m.-</b> Discussion and Reflection with George Murdock	
<b>5:30-6:00 p.m.-</b> Dinner	
<b>6:00-7:00 p.m.-</b> Discussion and Reflection with George Murdock (cont.)	



SPECIAL BOARD MEETING  
BOARD/SUPERINTENDENT RETREAT (DAY 2)

**NOTE:** The meeting location is accessible to persons with disabilities. A request for an interpreter for the hearing impaired or for other accommodations for persons with disabilities should be made at least 48 hours in advance of the meeting to Gaye Young at (541) 663-3202.

## RESPONSIBILITY

**Board Chairman**

- 2:00-3:00 p.m.- Retreat review and next-step.**

