

## The First 90 Days on the School Board

*By Del Stover*

John Pennycuff tells the story of a new school board member who, at the very first meeting after taking office, introduced a handful of motions without warning the rest of the board.

All went down in defeat.

"It was well-intentioned," says Pennycuff, a 20-year board veteran in Ohio's Winston Woods City School District. "The new member was just trying to hit the ground running."

But, as one board member advised this overeager colleague, "This might be a good idea, but you should have worked with me before tonight."

It was a rookie mistake that underscores the challenge confronting thousands of newly elected and appointed school board members: Just how do you "hit the ground running" and become as effective as you can, as quickly as you can?

Talk to board members -- both veterans and those still relatively new to the job -- and you'll hear a variety of opinions. Still, most agree that you can make a good start in your first 90 days.

That's when, they say, you lay the groundwork for effective board tenure. It's when you study the budget in depth, become better acquainted with the senior administration, and brush up on board policies and parliamentary procedures. It's also a good time to dig deeper into issues expected to come before the board in the months ahead.

Yet other tasks should be tackled as well, including building a good working relationship with board colleagues, studying how other members conduct their business, and developing a better understanding of your role. Each is critical to your success, but often they deserve more attention than they receive.

In short, you need to become a quick student of the art of "boardsmanship."

### Policies and procedures

Most early boardsmanship studies focus on the basics: How does one make a motion? What's the process for adding an issue to the next meeting agenda? To whom do you turn for information? What must you do -- and not do -- to comply with state open records and open meetings laws?

These are only the most obvious questions. Chris Maricle, governance consultant for the California School Boards Association, suggests new members study the process used to make decisions. That process can include the most obvious to the most subtle of practices.

Most boards want plenty of advance notice and background information before issues are put on the agenda. Some reach a general consensus through informal, one-on-one discussions outside board meetings, while others wait to debate in open session. Some presidents are strict in enforcing respectful discourse, while others are more indulgent or less capable of maintaining the board's decorum.



Understanding these dynamics certainly will help guide you in sitting through a board meeting. But, Maricle says, it also can help you weather occasions when controversial issues put a strain on board relationships.

"A big mistake is letting issues become more important than the board itself," he says. "Issues come and go. But if your process for making decisions is clear, and everyone supports that process, then the issues get the response they deserve." And your school board is still a strong team when the next issue comes along.

Your studies also might help you avoid innocent mistakes that sometimes ruffle feathers. Angela Peifer, associate executive director of board development for the Illinois Association of School Boards, recalls working with one board that found its relationship with a new member undermined early when the newcomer shared confidential information with the public.

It turned out to be a big misunderstanding, Peifer says. The new board member thought the information was covered by the state's public records laws and didn't know the board's procedure was to release it at the next meeting. In fact, the board member "felt really badly" about the misunderstanding.

"It was something that she didn't know, and it was something that didn't occur to the superintendent or rest of the school board to tell her," Peifer says. "And because there already was some tension between the new and old board members, the assumption made on the part of the old board [members] was that she was deliberately releasing documents to undermine their work."

That's not to suggest new members should feel like they're walking through a minefield until they master board policies and procedures. You usually can trust that your colleagues expect you to make some mistakes at first. But it can't hurt to pull out the policy manual and do your homework.

## **Getting oriented**

If you're fortunate, your district won't leave you to figure out all of this on your own. In Pennycuff's district, for example, new members are invited to an orientation session where top administrators explain everything from budget intricacies to the policy implications of the Individuals with Disabilities Education Act.

Some briefings are conducted by veteran board members who meet individually with newcomers, says Pennycuff, president-elect of the Ohio School Boards Association. Half of the agenda of those meetings, he says, is simply to allow newcomers to get to know their new colleagues.

"Most of our new board members didn't know the other board members when they started," he says. "They've heard their names, seen them at PTA meetings, but there was no working relationship. But it takes a working relationship to handle the tough issues that come along ... that really test the teamwork of the board. So you have to practice that."

Not every board is as well organized, and new members might need to fend for themselves. If that's the case, say board veterans, take the initiative. Pick up the telephone and arrange meetings with your superintendent and board president.

"Let [them] know you're an eager learner, that you will be grateful for any help they can give you in learning about this important job," suggests Mary Jane Vens, board development director for the Association of Iowa School Boards. "Ask them about appropriate procedures to follow."

Another invaluable resource is training offered by organizations such as your state school boards association. Many sponsor workshops specifically targeted to new board members. Dana Smith, a board member in New York's Madrid-Waddington Central School District, teaches such workshops for a county association, and he says you can't go wrong attending a program that "gives people the opportunity to see how others function, to see and listen to what the experiences of other board members are."

If history is any guide, however, some will dismiss the need or urgency for such training, even though most board members insist that attitude is a mistake. School districts are a far more complex organization than a new member realizes, and few come to the job with the professional experience necessary for the scope of work facing them.

"Being a board member requires a set of professional skills like many professional disciplines," Maricle says. "If you believe professional development is good for teachers and the principal and superintendent, then you must believe professional development is good for the board."

## Collegial relations

Joining the board means you've joined a team. As with any team, you need to learn how to work well together. You don't have to agree on every issue, or even like each other, but you need to treat one another with respect -- and it doesn't hurt if your colleagues understand your values, hopes, and ideas for the district. It's even better when you find common ground on some issues.

So it's worth the effort to reach out. For Laurie McCaulley, the first new board member in Huntsville, Ala., in more than a decade, that began with a series of conversations over coffee or a meal with each new colleague. Or, as Maricle suggests, you can simply initiate a friendly hallway chat with colleagues before a meeting or talk in the parking lot afterward.

"A little honest interest in other people's lives is a very welcoming thing," Maricle says. "You don't have to be intrusive. Just ask how the family is doing. People can respond or not." And, as for inviting out a colleague for a cup of coffee, he says, "I'm a big fan of Starbucks."

If this all sounds "touchy-feely," remember that relationships play a significant role in how the school board functions, board veterans say. All human beings respond better to mutual respect and trust. As a board member, you won't change a vote based on whether someone likes you, but it's more likely your arguments will receive serious consideration if others know you have a commitment to serve schoolchildren.

Don't be shy about sharing opinions, but listen more than you talk at first. It's worth learning how much time your fellow board members invested in that school boundary plan you dislike. And it might not be wise to suggest school uniforms to improve student discipline, only to discover the board dropped such a policy five years ago because it failed to deliver on its promise.

"Ask why something is the way it is before you criticize or try and change it, and really listen to the answers," says Kathy Pettiss, a board member in Pennsylvania's Great Valley School District.

Also, don't take it personally if some colleagues don't instantly warm up to your ideas. "It's human nature, in any organization, for veterans to have a sense that the new guys need to pay their dues," Peifer says. "Whether that's fair or responsible, it's human nature. When they are feeling new folks are overstepping their boundaries, without having taken the time to listen or learn, it causes a whole lot of resentment and hard feelings."

## Know your limits

Time and time again, you hear the refrain: The board sets policy, and the superintendent manages the district's day-to-day operations. School boards aren't supposed to micromanage. An individual board member has no authority except his or her vote at a board meeting.

It sounds simple enough. Yet, every year, tales arise of board members who repeatedly challenge administrative decisions, interfere in hiring matters, or call up central office staff because they promised angry parents that they'd "check into their problem." That can lead to friction with the superintendent, staff, and board colleagues.

That's not to say that new members should stay silent when they see problems. "Of course the superintendent is the CEO, but he or she should not expect a rubber-stamp board," says Tim Lamb, a board member in Grand Forks, N.D. "But new board members need to learn to operate within this delicate balance of two extremes on a continuum of practices in boardsmanship. As a 10-year board veteran, I ask a lot of questions and give my advice, while I support the administration's recommendations by and large."

Once that lesson is learned, new members will find they have to teach it to their constituents. Some parents who have voiced complaints are quick to turn to new board members, hoping for a more welcoming reception. Having a copy of the policy manual near your telephone can be of some help.

"New board members get bombarded by the squeaky wheels, and they need to ... be careful how they respond, so they don't find themselves committing to something they can't legitimately follow through on," says Bill Nemir, director of leadership team services with the Texas Association of School Boards. "When someone calls you, you should refer them [to the appropriate administrator] and say, 'We've got a policy to help you get your problem resolved as quickly as possible. Here's what the policy says to do.'"

Your superintendent and board president can help you find where many boundaries lie. A case in point: More than one novice board member has dropped by a school unannounced, only to have the superintendent or board president call them later to say the visit was intrusive or disruptive. Savvy newcomers ask about the protocols of such visits before they act.

"Every district is a little different," notes Kathy Hayes, executive director of the Michigan School Boards Association. "Some of these things are just not seen in written policy. For example, in some districts, it's just fine to pop in after a quick call to the building administrator. In other cases, you'll want to talk to the superintendent, and let the superintendent get the OK."

## Untapped opportunities

One reality for school boards is that there aren't enough hours or bodies to accomplish everything. But you can turn that to your advantage. Sometimes the fastest way to carve out an influential role on the board -- and win points with your colleagues -- is to offer to help out where needed.

So it can't hurt to volunteer to serve on a board committee or act as a liaison with the state school board association's legislative advocacy program, Pennycuff says. In smaller districts, offering to attend after-school events or volunteer in a school can help the board demonstrate its support for students and staff.

"In your first month or two, really watch to see what other board members do, and what is left to do," Pennycuff says. "I can guarantee there will be plenty left to do. Move over into something that you and your board colleagues can agree upon."

For Dana Smith, the school board's policy committee is a good starting point. It helps you get up to speed on how the board should function, and it helps your board colleagues. "People don't like to go through those dry, dull policies, but they need to be updated. My experience tells me that the board president is always looking for someone to fill the slack on those committees. Don't be afraid to step up."

Finally, say board veterans, be patient. It can take a year or more before a new board member gets fully up to speed. During that time, just keep learning everything you can -- and demonstrate that your board colleagues can count on you, Peifer says.

"There has to be this sense among your brother board members that you are competent, that you know what you're talking about, that you bring something of value to the table," she says. "You show that by listening, asking questions, and demonstrating your competence."

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Illustration by [David Julian](#).

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## Your first board meetings: Is silence golden?

You talked quite a lot during your election campaign about what the school board should -- and shouldn't -- be doing on behalf of students. Now you're ready to speak up as an elected policymaker. So where do you begin?

If you're smart, you'll keep your mouth shut.

No, not really. But we hope we got your attention.

Board veterans suggest you should, however, show some restraint when tossing out ideas and opinions in your first weeks on the board. There's still quite a bit you don't yet know about how the district works, and there's no point in putting the proverbial foot in your mouth.

"There's some real value in the 'silence is golden' maxim for maybe the first meeting," says Angela Peifer, associate executive director of board development for the Illinois Association of School Boards. "It's not that a school board member doesn't have a right to speak up. But by listening and learning for the first meeting or so, you're demonstrating that you have some respect for what's gone on before, that you want to learn."

That's not to say you should decline to offer an opinion on a new policy up for a vote -- or question administrators after a report to the board.

"When we're sworn in, we hit the ground running," says Pamela Price, director of board development services for the Pennsylvania School Boards Association. "We're required to vote on issues the very first meeting. Sometimes we don't have a lot of time to get up to speed, so it's important to ask questions. There are no stupid questions, especially for new board members."

But a board meeting isn't the best time for a new member to criticize procedures, toss out suggestions, or advocate for new initiatives. You might discover, for example, that your clever idea is prohibited by state law. Or that elements of some heartfelt project already are incorporated into an existing program. Or that a similar idea was tried a few years ago -- and fell flat.

On the other hand, says Mary Jane Vens, director of board development for the Association of Iowa School Boards, there are times when silence is "deadly," particularly when you are called upon to vote on issues.

"You are elected to vote," she notes. "You do not get to abstain for the first six meetings while you 'figure it out.' The public also deserves to know why you voted as you did. This means thoughtful speaking, not silence, is golden."

### **Your agenda, role might need rethinking**

At a new board member workshop that John Pennycuff attended, the meeting's facilitator asked how many in the room were motivated to run for office because of a single issue -- perhaps to fire the superintendent or change a specific board policy.

Three-quarters of those in the room raised their hands.

Those members were soon to learn the harsh realities of board service, says Pennycuff, president-elect of the Ohio School Boards Association. As is so often the case, they were surprised by how little authority they really had.

Pamela Price, director of board development for the Pennsylvania School Boards Association, says this type of reality check is not uncommon. But those who run for office typically are long-standing community volunteers who like to "roll their sleeves up and get the job done."

That's fine if they have the patience to advocate their views, work to build consensus, and accept that compromise -- or even failure -- might follow. Where trouble arises is when new board members lobby too forcefully or express their frustration or resentment when their views aren't instantly embraced.

"Going in with an attitude -- or an ax to grind -- has to do with the board member really not understanding what role they have," Price says. And pushing board colleagues too hard "typically just offends a lot of folks."

And, even if you are successful in getting your way in your first month in office, "what do you do for the next three years and 11 months?" Pennycuff asks. "What do you do for your kids then?"

New board members also can become frustrated when dealing with requests for help from parents and community members. With no authority to take action themselves, and policies that call for complaints to be referred to administrators, they can feel stymied.

Bill Nemir, director of leadership team services for the Texas Association of School Boards, encourages members to think of themselves as a board of trustees -- not as a miniature state legislature. Their role isn't to represent constituents directly. They are entrusted to make decisions in the best interests of the community's schoolchildren.

"You don't get any support from the public on that idea," he says. "But your job is not to reflect or pass on what you hear from folks [to the administration]. Your job is to listen carefully but exercise your own judgment."

### **It's time to do your homework**

To be effective, a school board member must know the lay of the land. And that means doing your research. At state associations, those who train new board members say one of the first things you should do is read, read ... and read some more.

Here are a few documents to peruse:

- Teacher contracts
- Superintendent's contract
- Last six months of board minutes
- Policies related to school board operations
- Strategic plan and mission statement
- Recent student test scores
- State open-meetings laws
- Board or state code of ethics