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Developing an entry plan: Part 2

By Dr. Peter Gorman

My first day on the job as superintendent of Charlotte-Mecklenburg Schools was July 1, which gave me three solid months after accepting the offer in April. It is important to get started in a new role, so I took advantage of the time difference between California and North Carolina: From 5 a.m. to 8 a.m. in California, I could make phone calls to Charlotte, N.C., three hours ahead, without affecting my work in Tustin, Calif. However, I never let Charlotte responsibilities impact finishing my duties in California. It was important to me that I leave in a graceful way and that means working hard up through my last day on the job. Most of that three-hour period each day was spent on the phone with Board of Education members, district staff, other government officials, business leaders, and community members I'd be working with in July.

I had the senior staff in Charlotte prepare briefing documents for me that included resumes, organizational charts, job descriptions, recent evaluations, areas of pride and concern, key performance indicators, and any other available metrics to measure performance.

Before I arrived, I had chosen an indefatigable assistant to closely assist me. I also developed a close relationship with the chief communications officer. They became the backbone of the district's communications efforts that are integral to a superintendent's entry. My assistant and the chief communications officer had worked in CMS for many years and were able to fill me in on a lot of vital context. Building these early relationships was invaluable!

Working with them and others, we created an

entry plan that set an overall objective to listen, learn, and lead. The purpose of the entry plan was to establish a set of activities that would guide my transition to the superintendent role of the Charlotte-Mecklenburg Schools. The activities were designed to enable me to gather information quickly about the community and the organization; to establish a strong community presence early on; to assess the organization's strengths and weaknesses; to identify critical issues; and to create a network of contacts and resources.

The plan had three distinct phases.

Phase I was pre-entry, and it covered the period from April to June 30.

Phase II was entry, and it covered the period from July 1 to Sept. 30.

Phase III was development of an action plan, and it began on Oct. 1 and concluded on Nov. 30.

Looking back, I think the meetings were important, but a good number of them benefited the people I met with more than they benefited me or the district. Those meetings involved people who had a long-standing grudge or issue with CMS, a pitch for a program or idea, or concerns about individual children. The meetings were necessary because they allowed me to meet a lot of the stakeholders, but in terms of distilling districtwide issues, not all were effective.

Throughout the entry plan, I kept the Board of Education informed with periodic updates about what I was hearing and whom I was meeting. A formal report was provided to board members at the conclusion of each phase. Once in Charlotte, I also led the district simultaneously with executing my entry plan. ■

Governance policy development strengthens a board

Here's an interesting board challenge: Your board lacks a clear understanding of what it should be doing as policymakers.

By committing as a board and administrator team to develop governance policies, your board can develop a better grasp of its role. There is a lesson for boards in this issue: The time and money spent are well worth it if you end up with a board that understands its role.

This approach works best if the board understands it lacks board development. Developing your governance policies is a long process for both a superintendent and the board — a learning process about the district overall.

The board needs a strong president who supports the effort for it to succeed. That is key to getting people on the board to engage in the process of understanding the board's role — strong leadership.

You may want to engage a facilitator to help the board develop its governance policies. With few exceptions, board members are not very experienced in policy development.

To develop new governance policies for your

district, the superintendent and the board should spend meeting time analyzing and discussing proposed policies. Invest the time at board meetings or in a retreat setting.

The board's work should result in board policies that address the following responsibilities: the board member's job description; explanations of board committee functions; a listing of board tasks; annual board and committee work calendars; and descriptions of board committee tasks and policies for several board committees, including governance, finance and program.

Even though it can be painstaking to get into the minutia of policies, its useful for the board and superintendent team. It educates board members about their role, and it documents that role in the governance policies the board approved.

Instead of the superintendent leading the board, the board will lead itself:

"Now, the board will say, 'We shouldn't need Jim to tell us that we need to evaluate our performance. We need to step up and do this on an annual basis.'" ■

Policy development leads to board job description

Develop a board member job description as part of your work on creating governance policies. It should cover specific duties and expectations of board members such as these:

- Specific duties and expectations.
- Educate oneself about the work of the district.
- Attend meetings and show commitment to board activities, values, and norms.
- Be well-informed on issues, agenda items, and background materials in advance of meetings.
- Work closely and cooperatively with other board members.
- Listen respectfully to differing points of view and participate in decision-making.
- Contribute insights, skills, knowledge, and experience, when appropriate.
- Elect officers; orient and train new trustees for continual leadership vitality.
- Act as a resource and sounding board for the board president and superintendent and, when appropriate, members of the management team.
- Be an advocate and serve as a liaison between the organization and the community; monitor and enhance its image and keep the president, administrator, and trustees informed about public opinion.
- Receive and consider regular evaluations on the effectiveness of the district's work.
- Assume leadership roles in board activities consistent with individual skills and interests. ■