

# Board & Administrator

## FOR SCHOOL BOARD MEMBERS

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## Developing a superintendent's entry plan: Part 1

By Dr. Peter Gorman

You don't want to break promises, and the best way to do that is not to make any in the early days on the job. So I recommend having a set of prepared answers that are substantive without being specific.

"Our goals are to consistently increase academic achievement for all students, close achievement gaps, and increase the number of students who graduate ready for their next phase of life. We will ask ourselves three questions when we consider plans and programs: Is it educationally sound? Is it good for kids? Is it fiscally responsible and sustainable? If the answers are yes, yes, and yes, then we'll consider it." In Charlotte, I used these answers like a mantra in my first few months, and it bought me some time — time that I needed to execute my entry plan and start building the district's strategic plan.

Looking back on my first few months in Charlotte, I learned a lot, and some of it was in the school of hard knocks. I learned that context matters — who's asking the question, where it's being asked, and why are all important factors to consider. The early days were so full and so urgent — and sometimes I forget that there were a lot of bruises in there, too. A lot of the bruises originated with the *Charlotte Observer* and a local "right-wing" paper, which ran a combined 123 editorial cartoons about me in a little over five years — and most of them were not praising me for vision and leadership! This work was hard, and it took a long time, something else I have to tell myself when I think back to the start of my time in Charlotte.

Context matters in another way, too. Charlotte-

Mecklenburg Schools was far from broken when I got there. It was (and still is) nationally recognized for innovation and excellence — in fact, that reputation was part of the reason I was drawn to the job in the first place! I came to work in a district that had a solid foundation. I had a strong team with a lot of accumulated knowledge and experience that was readily shared with me, making my job easier, especially early on when I was finding my way.

One word of advice: Never, ever say negative things about your predecessor. One, it's unprofessional and will make you sound spiteful and petty. Two, you are not in a position to judge because you weren't there when your predecessor was and so you don't know the context for decisions that were made. Your job is not to point the finger of blame at someone who's no longer there. Your job is to figure out what went wrong and fix it, and what went right and keep it.

I've also realized that all educational leaders need to acknowledge that being an educator is harder today than it's ever been. Not all leaders have had current experience in a classroom, and a lot has changed in the last 20 or 30 years — or even in the last 10.

I'm very cautious — wary, even — when I hear people talk about the good ol' days. When someone starts talking about how it used to be better back then, I find myself remembering a photograph of the integration of a school in Little Rock, Ark., that showed a young black child watching as a white mob paraded to a school to keep black students out. I want to ask those who are looking back, "Those days were good for whom?" ■



## **Don't obsess over how the money is spent; monitor**

The district's finances and its financial health are major concerns of the board.

As a board member, you have to make sure there is adequate income to pay for the schools' day-to-day operations as well as for its long-term goals.

This may seem overwhelming, although it really isn't. Your role as a board member is to be concerned about the district's overall financial health, rather than obsess over every penny it spends.

To perform your role, you must monitor the district's finances by watching these four areas:

1. Setting financial policy. The board decides where the money goes based on the district's long-term plan.

2. Approving a budget. The budget is the district's annual financial blueprint. Your responsibility is to make sure there are enough resources to meet goals and objectives for the coming year.

3. Delegating to the superintendent the authority to carry out financial policy. It's your administrator's job to spend the money the board has budgeted. Once you've approved the budget, step aside and let him spend allocated funds.

4. Monitoring financial outcomes. A big part of the board's responsibility is to monitor the results of the superintendent's spending decisions.

Board members are naturally concerned about money. Are we spending wisely? Will we be able to pay the bills? Is there enough to pay for future needs?

Worrying over the bills leads many board members to wander around in the weeds of the district's finances. But the board member's proper

role is to monitor financial outcomes. To do this, ask your superintendent these questions:

1. Are we on target with planned expenses and revenues?

2. Do budget expenses and revenue projections work out?

3. Will we have income to pay future expenses?

Keep in mind that not all financial figures need to be reviewed. To answer these questions, you're going to need to see financial figures. Ask your superintendent for these:

1. A financial statement. A financial statement should summarize revenues and expenses in a way that gives you a clear picture of the district's financial condition. As you review it, you'll want to avoid getting bogged down in the specifics. Remember, you don't need to know where every penny goes, but you do want to get a general picture of how things stand.

2. Bottom-line figures. Because you are more concerned with general information than item-by-item explanations, ask your superintendent to highlight bottom-line figures on the financial statement. This will help you focus on the two areas that really matter — expenses and revenues.

3. Historical figures for comparison. It's important that you put the figures you are looking at into context. To do this, you'll need a statement of this month's figures, as well as last month's and the corresponding figures from months in the past year.

You might want to ask the superintendent for year-to-date figures for the current month and the corresponding month for the previous year. ■

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## **Neighbor request to fix school equipment: Handle or forward to superintendent?**

Question from a school board member: "My neighbor calls me up and explains that the school where his daughter attends has a piece of equipment that is broken and shares his concern about kids using it. Do I phone the principal and let her know of the issue?"

Answer: These are difficult questions because board members are first and foremost citizens, with friends and neighbors in the community. And when a friend or neighbor asks for something, you take it seriously. It wouldn't hurt to give the principal a quick call, would it?

The issue seems small, but it's still a matter that many boards anticipate and address in their board policies. As a board member, it's important that you follow and respect board policy. Rather than making the call to the principal yourself, it's best to acknowledge the parent's concern, ask if he's contacted the principal directly about the matter, and then pass the equipment issue along to your superintendent.

The superintendent can follow up on the matter as necessary and let you and your neighbor know the outcome. ■