

# 2013 School Board Quality Standards Report



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## About the Author

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## Introduction

The United States has entered an era of unprecedented change in the governance of education. Changes include a rigorous national core curriculum, intensive teacher and principal evaluation systems, and the press for increasing accountability for the achievement of all students. The result has been a dramatic increase in pressure on governing school boards and superintendents to improve performance.



Today, the increasing demand for improved achievement and accountability in public schools creates an urgent need for school boards to clearly understand the evolving governance role of the board as it relates to the oversight of efforts to improve student learning. A school board self-assessment of topical priorities, time management, and effective role enactment benchmarked against research-supported criteria of highly effective boards will most likely result in improved practice. This is even more critical as research demonstrates a correlation between effective school board practice and improving student achievement.

## Project Overview

### Benchmarking Constructs

The benchmarking used in this report is a school board effectiveness model described as *balanced governance*. Balanced governance is defined as any school board governance approach that discourages micromanagement of the superintendent and district staff while setting out a constructive role for the school board in monitoring student outcomes more deeply.

A board engaging in balanced governance is one that strives to not only set and monitor high end-goals for student learning, but also knowledgeable about the means used to reach those ends. Balanced Governance equips boards to better dialogue with community stakeholders, and craft targeted policy language that intelligently oversees formative progress on adopted processes and programs.



Highly effective boards are characterized by their use of a balanced approach to governance as highlighted in programs like the Iowa Lighthouse training (Delagardelle, 2008); reports on highly effective school board characteristics as described in the NSBA Center for Public Education report (2011) and Oregon School Board Association Bridges to Achievement Standards (OSBA, 2008); and substantive research on school board effectiveness (Alsbury, 2008; Walser, 2009). Constructs used as benchmarks in this Jefferson County School study are based on the collective of research-supported best practices and effective characteristics of highly effective boards linked to a balanced governance approach and improving student achievement.

## Project Methods

This study included an analysis of the school board meetings of the Jefferson County School District in Kentucky. The seven-member board and the superintendent were observed through video-tapes of the board meetings in session. In total, 21 regular board meetings were observed including meetings held in 2013 on the following dates: 1/14, 1/28, 2/11, 2/25, 3/11, 3/25, 4/22, 5/13, 5/28, 6/10, 6/24, 7/8, 8/12, 8/26, 9/9, 9/23, 10/14, 10/28, 11/11, 11/25, and 12/9. Of these, the video data for the board meeting held on 8/12 was an abbreviated work session and not a regular complete board meeting. In addition, the video tape for the regular meeting on 5/28 only included the first 22 minutes of the meeting. Consequently, these data were not included to protect the validity of the analysis, leaving 19 complete regular board meetings. In addition to the regular meetings, topic data were collected on an additional 10 board work sessions.

Video tapes of the board meetings were viewed by two researchers independently. A data collection protocol was developed including basic descriptive data including the length of meetings, number of items and type of items discussed. In addition, data were analyzed using multiple rubrics developed for this project measuring the effectiveness of school board behavior. These included 4 major benchmark rubrics on direct versus supportive instructional topics, bridging and bonding behaviors, and goal monitoring versus management inquiry. All benchmarking rubrics were supported by peer-reviewed research described under Benchmark Constructs and cited in the Reference section of this report.

School board actions on the video-tapes from 19 regular board meetings and totaling 36.3 hours were categorized and noted for duration by both researchers using a constant comparative analysis methodology. The researchers then met and compared analyses for comparability, which measured 98% reliable. For the remaining 2% of variance, researchers reviewed the videotape sections in question and negotiated a common finding.

When data from Jefferson County Schools are compared to national averages, and high or low performing boards, comparatives are drawn from the 2010 NSBA National School Board survey (Hess & Meeks, 2011) and the 2013 International School Board Member Survey (Alsburry, Unpublished), as well as data from the Iowa Lighthouse Studies (Delagardelle, 2008).

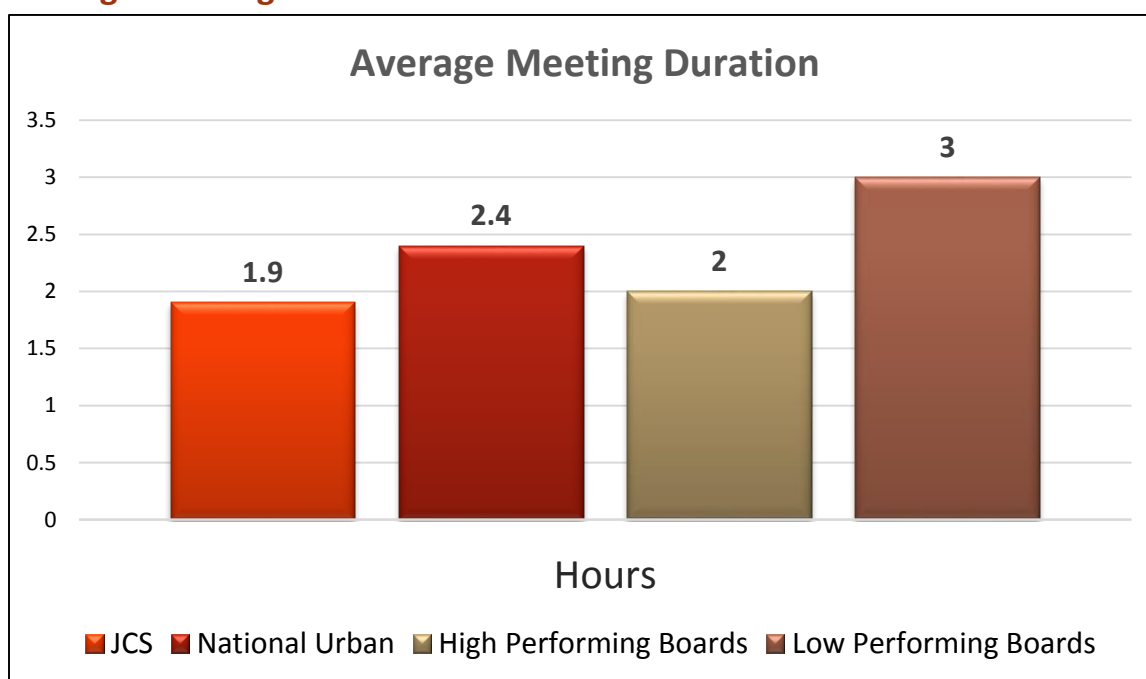
## General Data Description

### Meeting Length

Meetings in 2013 totaled 2,177 minutes or 36.3 hours over the 19 regular board meeting analyzed. In addition, board work sessions totaled 1,525 minutes or 25.4 hours. The length of regular board meetings varied from a low of 41 minutes on 11/11 to a high of 166 minutes on 4/22. The average meeting lasted 1.9 hours.

Jefferson County school board meetings were benchmarked for duration with the national average as well as reports from high and low performing boards from data collected in 2010 and 2013.

### Average Meeting Duration



**Benchmark: Meets Standard**

### Analysis

Generally, higher performing boards are able to run their meetings in a focused and efficient manner. Avoiding inter-board conflict, public unrest, and a temptation to focus on micromanaging the details of the school district, allows effective boards to keep their meetings at around 2 hours in duration or less.

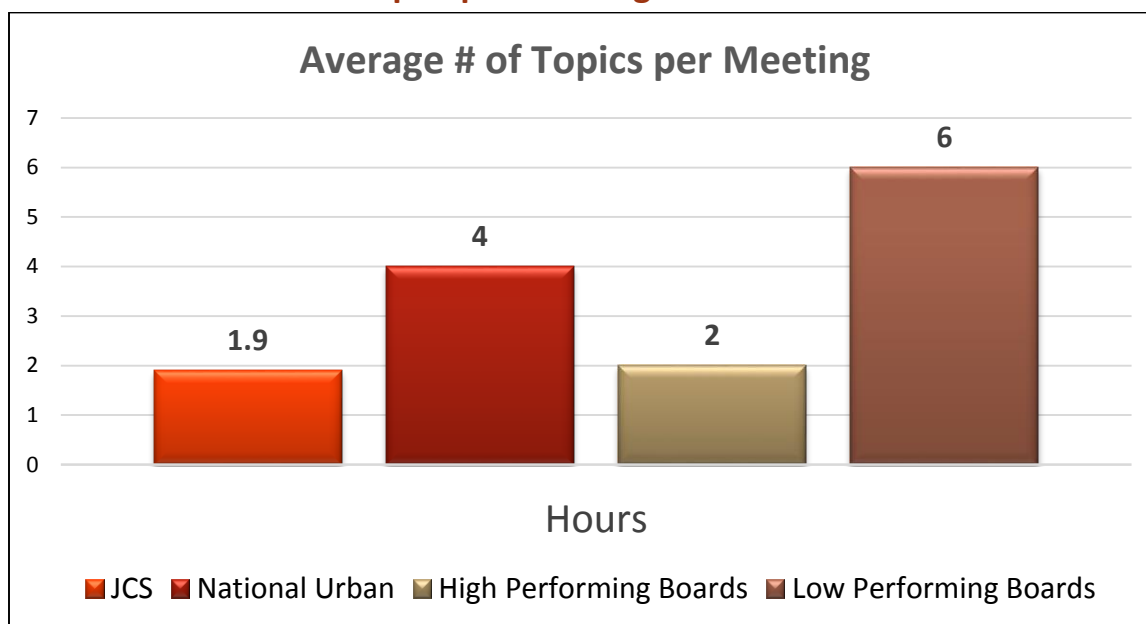
## General Data Description

### Number of Scheduled Topics

Meetings in 2013 totaled 36 individually scheduled topics during the 19 regular school board meetings resulting in an average of 1.9 topics per meetings. Topics were included in the study that were either (a) scheduled as significant presentations, or (b) afforded significant discussion time. An additional 18 topics were given substantive time in 10 additional board work sessions. Board work sessions usually occurred just prior to the regular board meeting and generally included discussions on the same topics covered later in the regular board meeting. Because few new topics were introduced in the work sessions, separate analyses of work session topics reaped no significant differences.

Jefferson County school board meetings were benchmarked for duration with the national average as well as reports from high and low performing boards from data collected in 2010 and 2013.

### Number of Scheduled Topics per Meeting



**Benchmark: Meets Standard**

### Analysis

Generally, higher performing boards focus their discussion on a few topics that they believe represent the most significant impact on improving student achievement. Generally, low performing boards include more topics; usually focused in the realm of management issues that have little or no influence on student improvement or on debating issues due to public conflict or inter-board conflict.

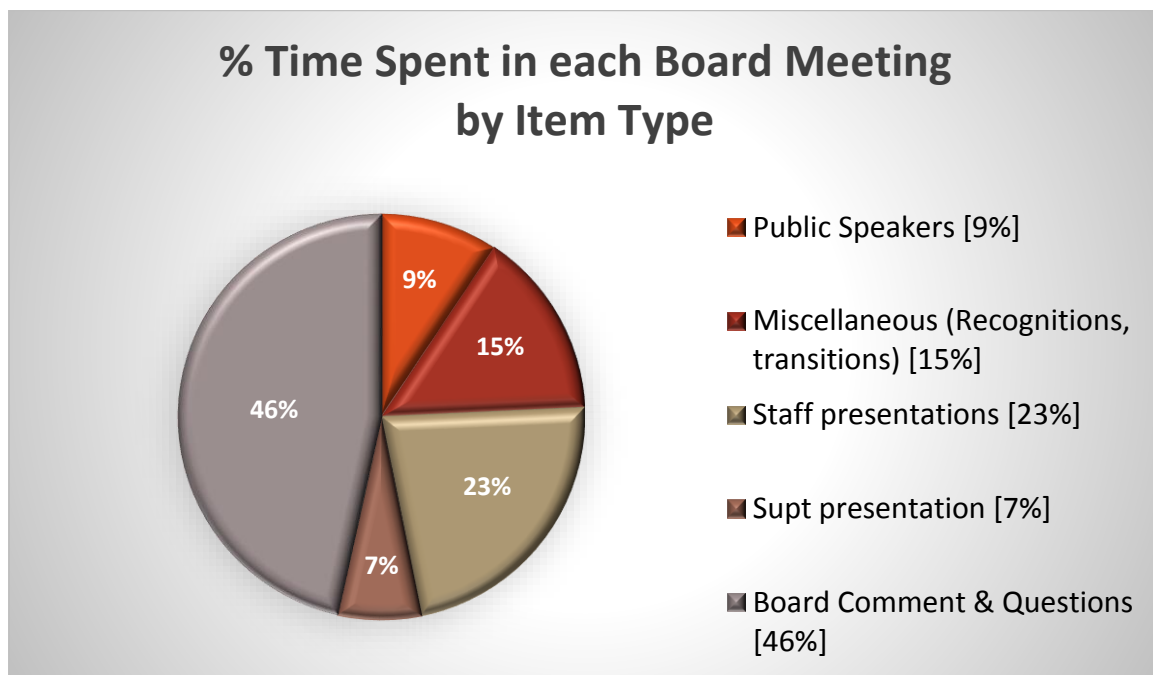


## Time Management

### Item Typology

JCS board meetings were managed by a consistent and effective board agenda. Jefferson County school board agendas included opportunities for public speakers, staff presentations, superintendent reports and remarks, board comments and questions, and miscellaneous items like recognitions, votes, board reports, and transitions between topics.

The chart below indicates the average percent of a board meeting taken up by each of these types of regularly occurring items. Notably, board comments and questions comprised the majority of time spent (46%). This item includes board questions or comments that followed staff presentations (23%) on district programs, as well as items pulled from the consent calendar for further discussion. It did not include board reports at the conclusion of the meetings.



**Benchmark:** **Developing**

## Analysis

Generally, higher performing boards spend most of their time receiving presentations from the superintendent and staff that focus on linking program elements to specific strategic plan goals. Board member questions and discussion items center on redirecting the superintendent to bring recommendations on revising programs that do not meet goals. On highly effective boards, board members avoid giving advice or seeking operational and management details on programs. Consequently, in high performing boards, Board Comments constitute about 25% of the meeting while superintendent and staff presentations consume about 50%.

Public Speakers in JCS meetings consumed a percentage of time equal to that found in high performing districts, except in certain board meetings where it reached 25%. Some Public Speakers did not address agenda items but returned over multiple meetings to promote a special interest. Many of the speakers had not followed a chain-of-command to seek information or a solution at the school or district level.

The superintendent presentations met standards of high performing boards; namely they did not take much of the meeting time but allowed staff experts to act as primary presenters and respondents.

## Recommendation

The board should brainstorm alternative methods for Public Speakers. The alternative approach should focus on (a) ensuring the Public Speakers speak on board agenda items, (b) not allowing multiple speakers from the same organization to “pile on” on the same topic, (c) not allowing speakers to bring the same topic over multiple board meetings, and (d) ensuring that the speakers have first sought a solution with the administration before being given meeting time.

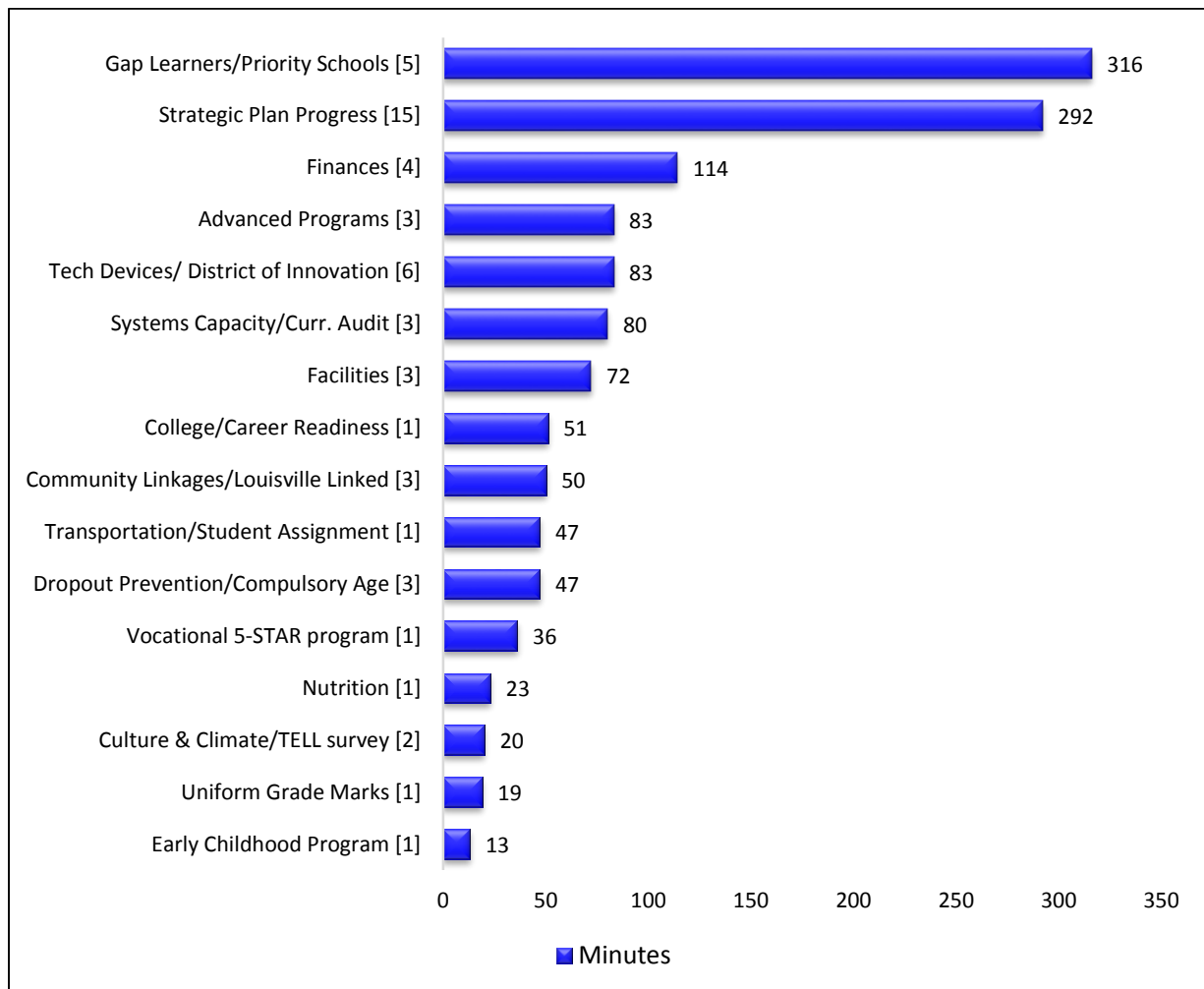
Of course, this is a public relations issue and so must be addressed based on the culture and expectations of the local community.

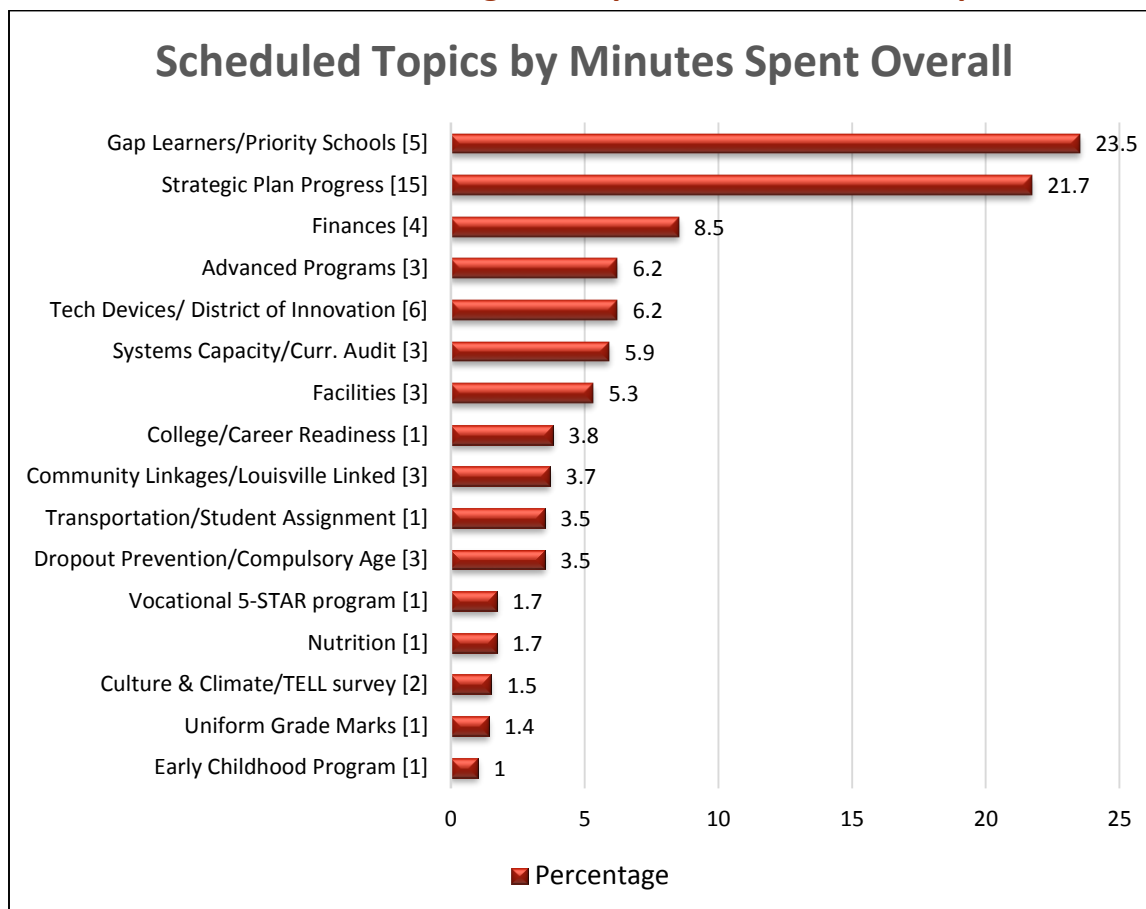
## Topic Analysis

### Scheduled Topics

Topics scheduled for discussion in the board agenda are represented in the charts below. For example, scheduled discussions included (a) the progress and improvement of priority schools, and (b) reducing the test achievement gap. These topics comprised 316 minutes (Chart A) or 23.5% of all the time spent in board discussions (Chart B). In addition, Chart A indicates that these topics were discussed in 5 separate board meetings.

**Chart A: Amount of Meeting Time Spent on Delineated Topics**



**Chart B: Percent of the Meeting Time Spent on Delineated Topics**

**Benchmark: Meets Standard**

### Analysis

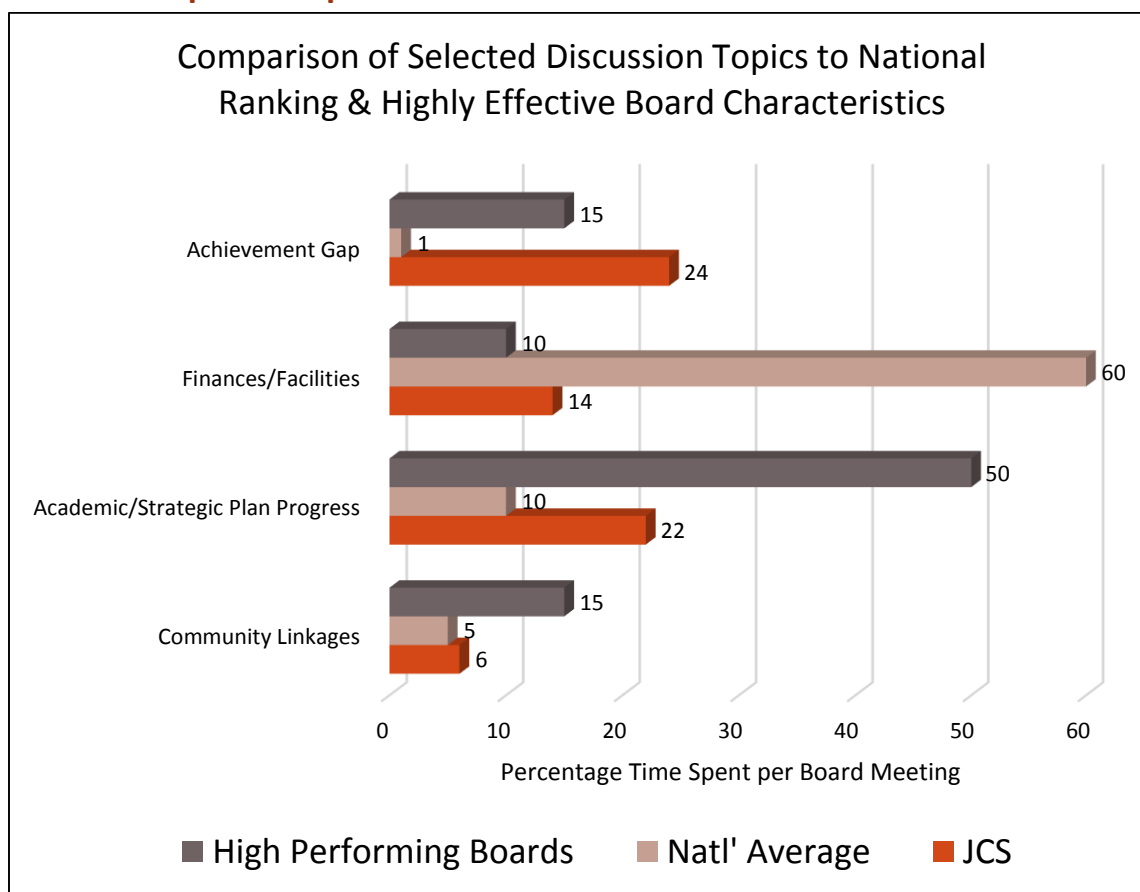
The determination of appropriate topics is subjective at best. It is entirely possible that contextual considerations and realities strongly influence the preferred amount of time appropriate to spend on a topic. For example, during the study period (2013), the JCS board and superintendent made clear their desire to focus on supportive instructional strategies, system efficacy, and organizational alignment. Consequently, it was expected that more time would be spent on supportive instructional topics during 2013. Even so, direct instructional topics like the focus on priority schools and tracking the student achievement gap still constituted 46% of all discussion time. High performing boards report spending more time on the neediest students, but also spend considerable time monitoring goal progress. Indeed, JCS met the benchmark this benchmark and engaged in goal monitoring in 15 of the 19 meetings observed.

## Topic Analysis

### Specific Topics Compared Against Effective Board Benchmarks

Jefferson County school board meetings were benchmarked for the percentage of time spent on specific topics where national averages and data among high performing boards were available. The results are shown in the chart below. Nationally, school boards indicate that they spend about 60% of their time on finances and facilities while JCS spent about 14%. High performing boards spend only about 5% on those topics.

### Selected Topics Compared to National Benchmarks



### Benchmarks

#1. Achievement Gap: **Meets Standard**

#2. Finances/Facilities: **Meets Standard**

#3. Strategic Plan Progress: **Developing**

#4. Community Linkages: **Does Not Meet Standard**

## Analysis

### Achievement gap

The JCS board exceeded both the national average (1%) and the benchmark for high performing boards (15%) in their devotion to discussing programs in Priority schools, and progress met on reducing the achievement gap. JCS is exemplary in their focus on this area.

### Finances/Facilities

JCS met the benchmark for discussing finances and facilities by taking only 14% for these management issues. High performing districts take a small amount of time on these topics (10%). Unfortunately, national survey findings indicate that most boards spend an enormous portion of their meetings on these issues (60%), sometimes referred to as the Killer B's: buildings, books, buses, and budget. Boards that spend more time on these management issues tend to reside over lower performing school districts.

### Strategic Plan Progress

The JCS board spent about 30% of their time relaying data that tracked progress on specific strategic plan goals linked to student achievement. This exceeds the national average of 10%. JCS made considerable progress in developing a Strategic Plan with measurable goals, as well as creating a data tracking system available to the board and the public. Indeed, they surpassed what most boards accomplish in this area. However, when compared to high performing boards, who spend an amazing 65% of their time in this area, JCS still has some area for growth to reach the benchmark.

### Community Linkages

JCS school board does not meet the benchmark standard for time spent discussing community partnerships and linkages that improve student achievement. The JCS board spent about 6% of their meeting time discussing excellent community programs like Louisville Linked and the 5-Star program. However, high performing boards spend about 15% of their time on community linkages.

## Recommendations

### Strategic Plan Progress

In order to make gains in the area of checking on Strategic Plan progress, it is recommended that the superintendent at JCS spend additional time during their regular superintendent's report. Currently, the superintendent spends only about 5% of the meeting speaking about Strategic Plan progress. The report could be increased by sharing even more data that indicate goal progress on strategic plan goals and analysis explaining the progress or lack of progress. In addition, this area can be increased by shifting school board member inquiries from a focus on management details to oversight on goal progress, as will be discussed in further detail in the section on Board Role Analysis below.

### Community Linkages

While JCS has developed some very successful community partnerships and devote 6% of their meeting time to these initiatives, the board could improve this area by active engagement and dialogue with the community during school board meetings. Highly effective boards occasionally incorporate community leaders, association members, and stakeholders (internal and external) into their regular board meeting schedule. The most effective approach is to engage stakeholder groups proactively in dialogue so they can express their vision for the community, provide ideas for new innovation, and supply feedback on existing programs. This approach could help JCS increase their goal of collaboration and transparency to both the public and internal stakeholders. It also could help the board and superintendent better monitor whether important group input is being heard adequately and accurately; something that was occasionally challenged by public speakers, board members, and in staff feedback.

## Topic Analysis

### Direct versus Supportive Instructional Topics

Topics that were either scheduled, or time-consuming topics that emerged during discussion periods, were analyzed. These topics were categorized based on whether they were considered a *direct instructional topic* versus a *supportive instructional topic*.

### Defining direct and supportive categories

In general, a *direct instructional topic* is one that *directly impacts* student achievement, like a new instructional method or improved curricular content. A *supportive instructional topic* is one that plays more of a supportive role to improve instruction, like starting a new scheduling system, or improving community access to student progress data. Both direct and supportive topics are called instructional because, they both impact instructional improvement and consequently student achievement gains. However, it is instructive to distinguish between the two because high performing boards tend to focus more on topics that directly influence student improvement.

### Scheduled Topics Delineated as Direct versus Supportive

Chart A and B report specific meeting topics and show them categorized as direct or supportive instructional topics. Chart A indicates the number of minutes spent on each topic and Chart B shows the percentage of time spent on each topic. The number in brackets indicates the number of meetings the topic was raised in a substantive way. For example, under Supportive Instructional Topics, the board spent 114 minutes or 8.5% of all their meeting time discussing finance and budget issues. Under Direct Instructional Topics, the board spent 292 minutes or 21.7% on tracking progress on Strategic Plan goals.

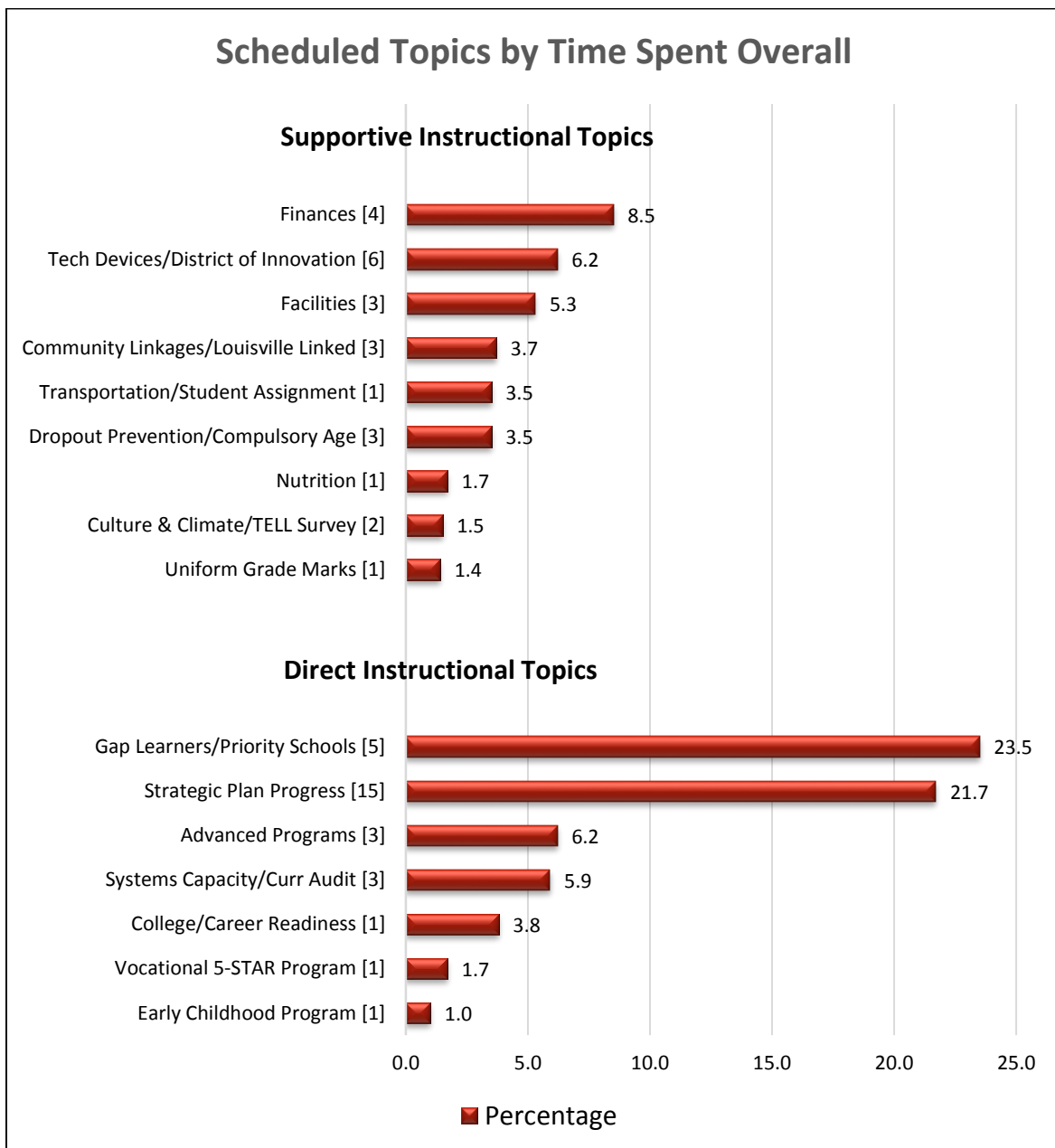
Chart C provides the percentage of overall time spent on direct instructional topics (65%) versus supportive instructional topics (35%).



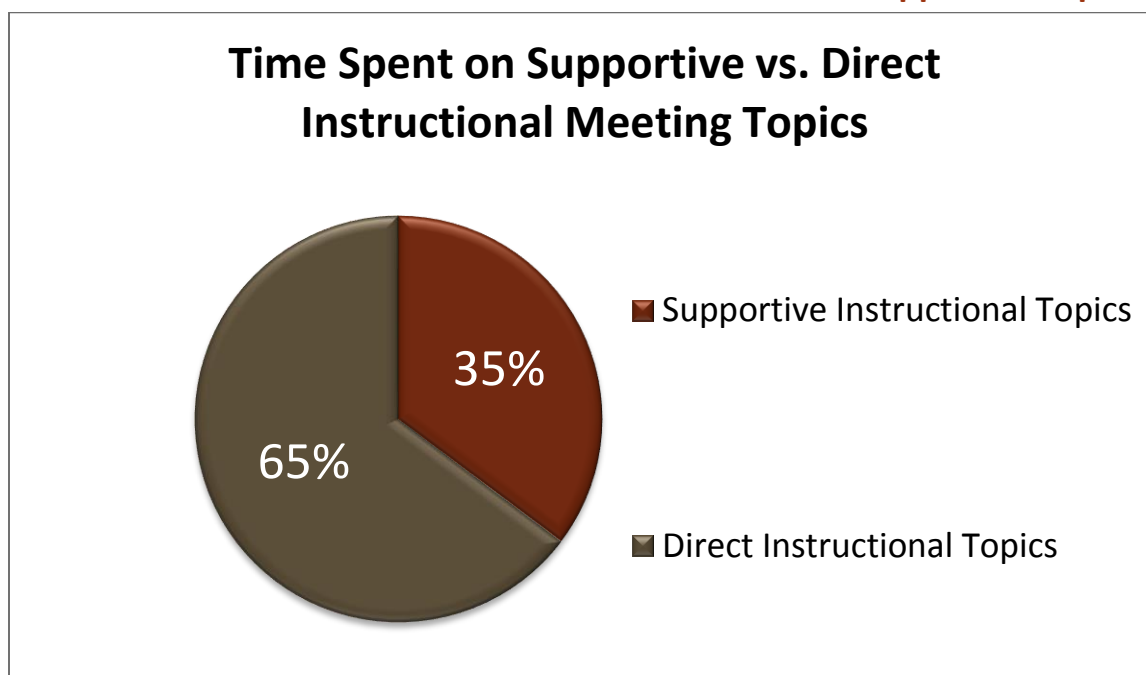
**Chart A: Meeting Time on Delineated Direct vs. Supportive Topics**



**Chart B: Percent of the Meeting Time on Delineated Direct vs. Supportive Topics**



**Chart C: Percent of Total Time on Delineated Direct vs. Supportive Topics**



**Benchmark: Meets the Standard**

### Analysis

The charts above show the data in two separate ways that lead to the same conclusions. First, the charts show the number of incidents in which the board engaged in discussions representing direct instructional topics (29 incidents) versus supportive instructional topics (24 incidents) as shown in brackets. Second, the charts show the number of minutes spent on direct instructional topics (65%) versus supportive instructional topics (35%), both individually by topic (Charts A & B) and collectively (Chart C).

Interpreting these data together indicates that the board scheduled more direct instructional topics over the course of the year, and spent more time discussing each of the direct instructional topics. High performing boards both schedule, and spend the majority of their time, on direct instructional topics with a benchmark target of 70%.

### Recommendation

Jefferson County school board members spend 65% of their time discussing topics directly influencing student improvement and therefore are close to the 70% benchmark for high performing school boards. The board could meet the benchmark standard by focusing on scheduling fewer supportive instructional topics onto the board agenda. In addition, board members could focus on bringing up topics during discussion periods that more directly impact student improvement rather than play a supportive function.

## Board Role Analysis

### Goal Monitoring versus Management Inquiry

JCS board meetings involved significant opportunity for comments, inquiries, and discussions from school board members. Generally, these occurred in response to staff or superintendent presentations. However, in many meetings, comments, questions, and requests directed to staff members and the superintendent appeared to be in response to external influences, complaints, or concerns. When evaluated over all board meetings, 61% of discussions, comments, and requests for reports could be categorized as management inquiries, with 39% focused on goal monitoring.

### Defining Goal Monitoring & Management Inquiry

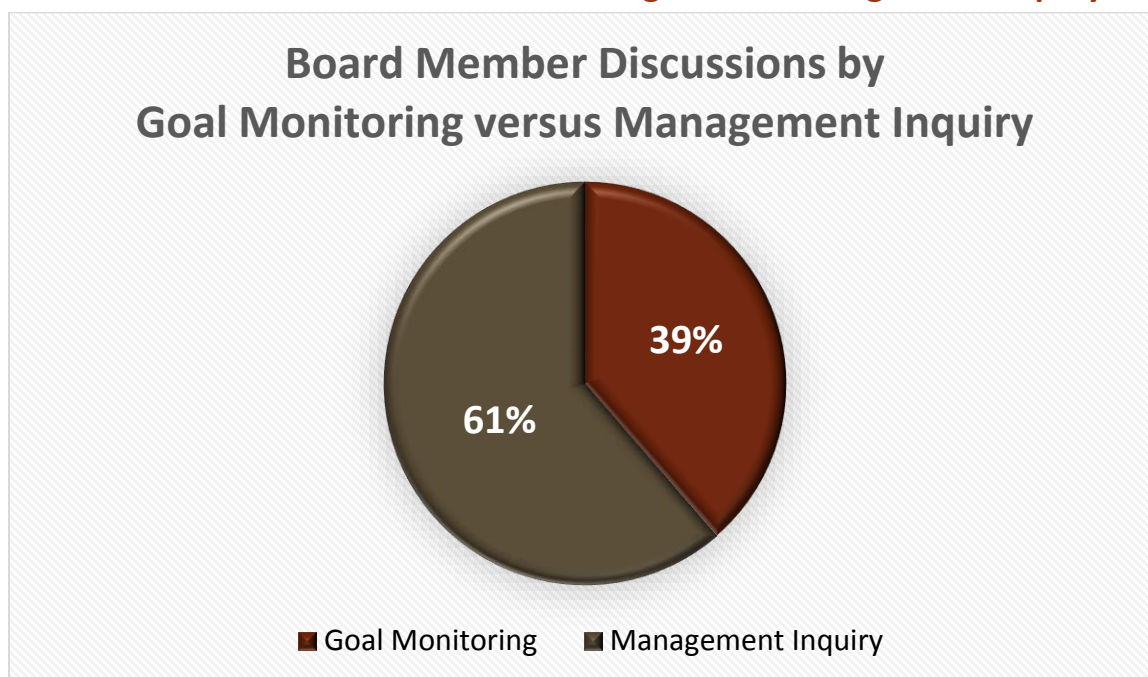
Goal monitoring is described as comments, questions, or requests for reports that focus on the following:

- Describing measureable goals from the Strategic Plan.
- Describing program details only to show how the program will reasonably meet the stated goals and/or explain the alignment of new programs on existing programs.
- Describing current performance outcomes in a way that is understandable and in adequate detail to monitor progress.
- Comparing a goal to the actual performance outcome so that gaps are evident.
- Describing program detail only to explain the reason for the gap between the goal and the performance outcome.
- Providing alternative or revised programs. Providing program details only to show how the new program or revision will improve on the outcomes.

Management inquiry is described as comments, questions, or requests for reports that focus on the following:

- Describing general program details not linked to measuring goal progress.
- Describing general program details for the purpose of general interest.
- Describing general program details for the purpose of responding to an external critic or inquiry.
- Describing general program details for the purpose of supporting a personal special interest.
- Describing general program details for the purpose of gathering evidence against someone else's personal special interest.
- Describing general program details for the purpose of critiquing or giving advice on program implementation.
- Giving critique of advice on program implementation to any staff other than the superintendent.

## Percent Time Focused on Goal Monitoring versus Management Inquiry



### Benchmark: Fails to Meet Standard

#### Analysis

A primary distinguishing characteristic of high performing boards is an intentional focus on goal monitoring in all board discussions. The opposite of goal monitoring is described as management inquiry. In its extreme form, management inquiry (also known as “micromanagement”), has been linked to declining student achievement (Peterson, 2000). The JCS board engaged in goal monitoring in 39% of their discussion time in comments, questions, or requests for reports. This percentage was consistent across all board meetings and regardless of the topic being discussed. High performing boards engage in goal monitoring 70% of the time.

High performing boards influence positive student achievement by combining the following:

- High expectations for student performance.
- Strictly monitoring the progress of student performance.
- Requiring the superintendent and staff to understand and explain why goals are not met.
- Requiring the superintendent and staff to develop and present program modifications.
- Expecting the superintendent and staff to recommend the elimination of ineffective programs
- Expecting the superintendent and staff to recommend new programs for adoption.
- Expecting the superintendent and staff to provide program details only to explain progress, or lack of progress toward district strategic goals.

## Recommendations

The JCS board should strive to meet the benchmark for high performing boards, setting a goal to engage in goal monitoring for 70% of the time. The JCS board should be intentional about reducing the number of comments, questions, inquiries, and requests for reports that fall into the category of management inquiry, using the criteria described above. This is a general procedural goal that should be applied across all topics of discussion.

Categorizing comments, questions, inquiries, and requests for reports as goal monitoring versus management inquiry is challenging to self-assess. Consequently, the board should request an analysis by an objective third party to periodically assess this measure of board performance.

## Bridging Versus Bonding

### Description

The chart below indicates the number of incidents of what is described as bridging and bonding incidents in JCS board meetings. As indicated, the JCS board engaged in approximately 25 high bridging actions and 8 high bonding actions over the course of the year. High performing boards engage in an equal number of high bridging and high bonding actions. The number of actions are not prescriptive but is recommended at 1 or 2 incidents per board meeting, maintaining the 1:1 bridging-to-bonding ratio.

### Critical Relationships: Bridging and Bonding

In studies of effective board leadership among all kinds of organizational boards, findings emphasize the need for the board to gain social capital with the community they serve. The study of “network connections” among individuals, groups and organizations is critical to gaining support and stability. Most people understand that strong relationships help minimize conflict and enhance collaboration and support for organizational goals.

One facet of networking that is often missed by boards is what might be described as internal ties. Internal relationships among board members, as well as external relationships among community stakeholders are both critical in determining overall board stability and effectiveness (Saatcioglu & Sargut, 2014). Results indicate that a school board’s effectiveness in accomplishing formal objectives is an inherently combined result of the degree of bonding within the group— influencing trust, cooperation, and reputation among members—and the degree of bridging with stakeholders on the outside—fostering the group’s creativity, diversity, and capability.

### Bonding: Internal Ties

Internal dysfunction undermines productivity and aggravates turnover on school boards. High levels of bonding in groups charged with formal governance perpetuate a civic culture that enables efficient decision-making, mutual accountability and consensus. Conversely, in boards with low levels of bonding, members may function as delegates of special interests in the community rather than trustees charged with pursuing common goals that reflect shared interests. Therefore, cultivating bonding within the board plays a considerable role in facilitating educational progress. High bonding boards tend to be more effective not only in representing and implementing community preferences, but in communicating the needs and goals of the schools to the community when necessary. Finally, bonding lowers the risk of divisive power struggles and enhances the ability to develop common beliefs about objectives. Despite the importance of bonding, studies indicate that over-reliance on strong internal ties may result in conformity to a degree that is counterproductive.

Bonding incidents were measured by interactions between board members that confirmed and demonstrated openness, honesty, frequency, and willingness in information sharing. Relational aspects include acknowledging others viewpoints and team spirit. Cognitive aspects of bonding focus on shared vision, including similarity of views concerning the district’s purpose and the degree of equal participation in board processes.

### Bridging: External Ties

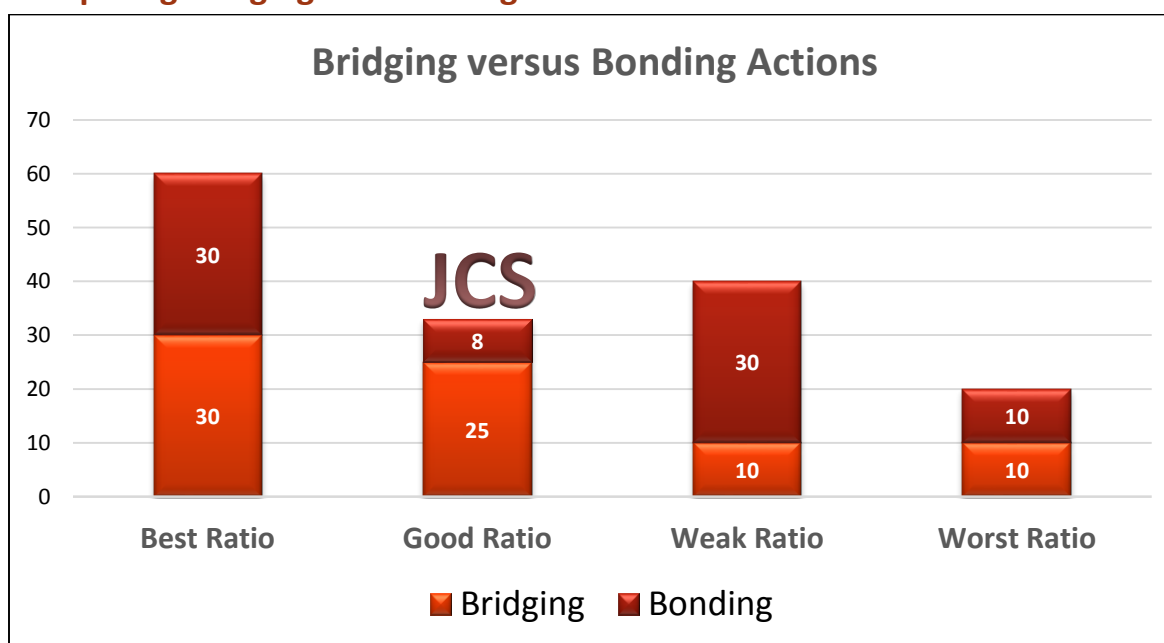
For school boards, bridging is important in forming alliances, managing uncertainty, and securing legitimacy in the eyes of external stakeholders. Strong relations between school board members and state and federal agencies facilitate the transmission of ideas to reconcile competing policy priorities. They are instrumental in securing financial and political support as well. Frequent interactions with local, state, and federal officials also help align education with other services, such as health, housing, and transportation. Finally, board member ties to businesses and universities are often beneficial, as a source of innovative strategies for school organization, financial support, and curricular adjustment and career choices for students. Likewise, the board's interactions with universities tend to be valuable in terms of new ideas for educational practices, academic progress, and teacher and staff development.

In this study of the JCS board, bridging incidents were determined by scheduled topics and discussions relaying school board interactions with external actors, such as city officials, state legislators, community leaders, parent groups and universities. Another indicator was the development of partnership programs with external entities, like the development of the 5-STAR and the Louisville Linked programs.

### High Performing Boards

High performing boards consist of members strongly connected to one another, with extensive relations beyond the group. A board with high bonding and high bridging tendencies aligns members inside the board, providing a more coherent vision for bridging outside the group. Boards with high bridging and high bonding benefit from individual views of valuable projects, but are able to work together to accomplish their goals.

### Comparing Bridging and Bonding Incidents



**Benchmark:** Meets Standard



## Analysis

While there is no perfectly objective way to measure bridging and bonding incidents, the benchmark associated with the highest performing boards favors boards that engage in high levels of both bridging and bonding. The next most effective method is a board engaged in high bridging and low bonding, followed by boards with low bridging and high bonding. The profile of lowest performing boards is characterized by low bridging and low bonding actions. Over the course of 2013, the JCS school board exhibited high bridging incidents and low bonding incidents.

## Recommendation Summary

The following is a summary of the recommendations to the Jefferson County school board to move toward reaching benchmarks for high performing boards in the management of time, the selection of topics, discussion foci, board role enactment, and balancing bridging (external ties) and bonding (internal ties).

-  Continue to maintain efficient board meetings that average approximately 2 hours in length.
-  Continue to maintain a manageable number of 2 topics per board meeting.
-  Review the protocols for public speakers during school board meetings. Focus on minimizing speakers who use the board meetings as a special interest platform or those not working through district channels first.
-  Continue spending the majority of the board meeting discussing direct instructional topics and work at scheduling 70% of those topics.
-  Continue to spend a majority of board time discussing the most critical strategic goals such as priority schools, reducing student achievement gaps, and monitoring progress on strategic plan goals.
-  Continue to minimize time spent discussing the Killer B's—buildings, books, buses, and budget.
-  Increase the time spent on the strategic plan progress by expanding superintendent reports and shifting board inquiries toward checking for goal progress and away from inquiries about implementation or management detail.
-  Continue to support community linkages through partnerships in academic programs. Increase community linkages by further developing effective and transparent opportunities for proactive stakeholder dialogue with the school board.
-  Balance the board agenda to include both direct and supportive instructional topics in every board meeting. Avoid multiple meetings that focus mostly on supportive topics.
-  Focus board comments, questions, and requests for reports on goal monitoring. Reduce board comments, questions, and requests for reports on management inquiry.
-  Continue to exercise actions that promote external bridging with community stakeholders. Increase activities and actions that reinforce and convey bonding among school board members.

## Further Reading

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