AGENDA
SPECIAL BOARD OF EDUCATION MEETING
Annual Planning Workshop
January 31, 2015
9:00 a.m. – 3:00 p.m.
Falcon Virtual Academy – Conference Room

1.   Community Vision Committee

2.   Student Representation and Governance

3.   3.a Board Governance

        3.b National Association of School Boards Conference – Denver 2017

        3.c Board Review of Meetings

4.   4.a Performance Excellence - Improvement Processes

        4.b Jim Collins' 12 Questions

DATE OF POSTING: January 27, 2015

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Donna Richer
Executive Assistant to the Board of Education

Special Board of Education Meeting
Annual Planning Workshop
January 31, 2015

1.   Community Vision Committee

a. 49 Voices

Please review video:

http://player.vimeo.com/video/106948670?title=0&byline=0&portrait=0&color=9c1e3d

Community Vision Committee

Community Leadership Team

49 Voices

Leadership District 49

What is the purpose of assembling a community leadership team?

What have we learned from similar efforts such as the Long-Range Planning Committee, the Capital Planning Committee, the SEAC, the DAAC, etc.?

How would existing SAC's, DAAC's, Falcon Educational Foundation and PTA's interact with the CVC?

What staff member(s) and board member(s) would liaise with the CVC?

What role would the CVC play in strategic planning, board elections, mill/bond elections?
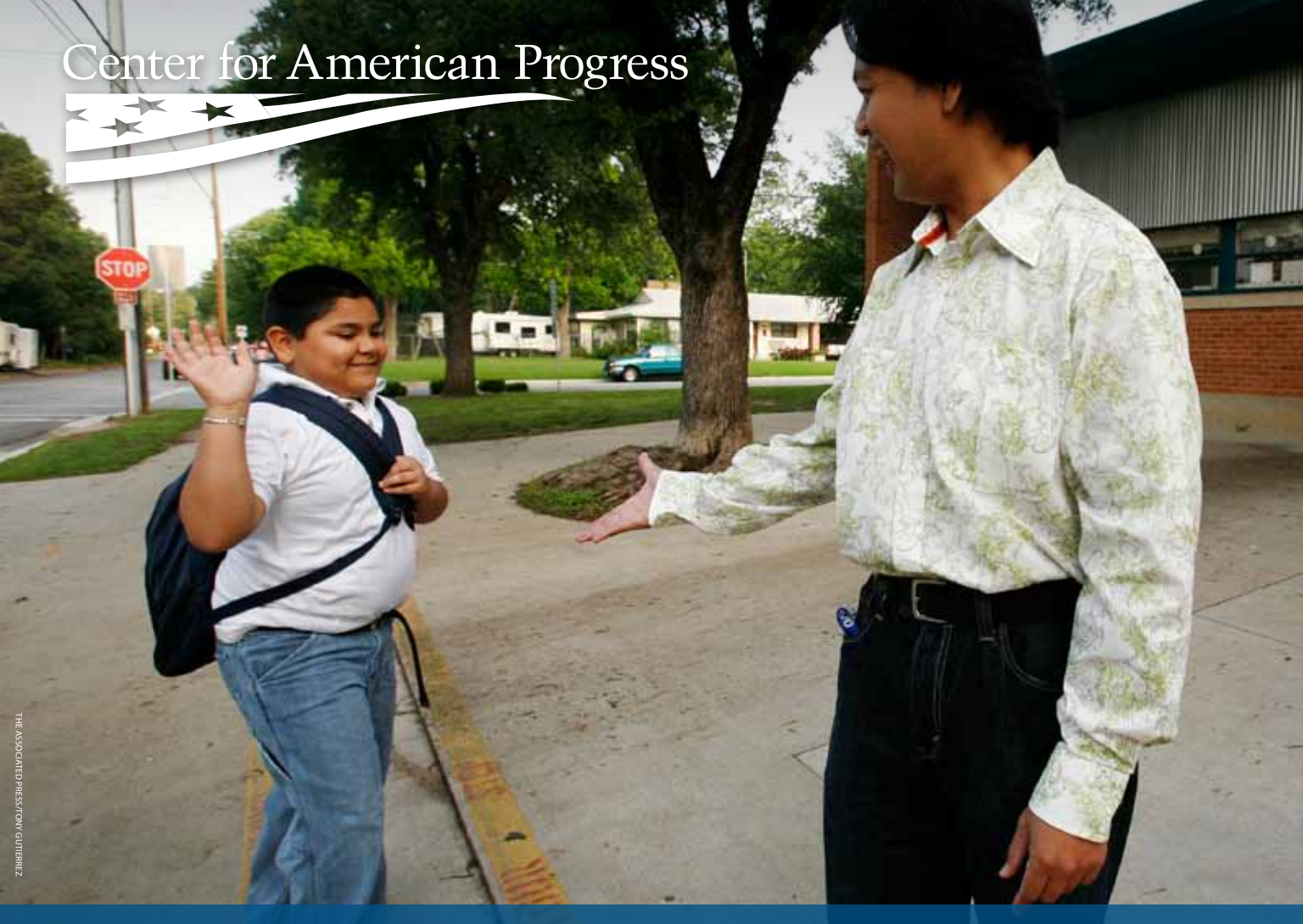
Center for American Progress

Achieving Results Through Community School Partnerships

How District and Community Leaders Are
Building Effective, Sustainable Relationships

Coalition for Community Schools
Because Every Child Deserves Every Chance

IEL
Institute for Educational Leadership

Martin J. Blank, Reuben Jacobson, and Atelia Melaville   January 2012

Center for American Progress

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How District and Community Leaders Are Building Effective, Sustainable Relationships

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About the Coalition for Community Schools
The Coalition for Community Schools, housed at the Institute for Educational Leadership, is an alliance of national, state and local organizations in education K-16, youth development, community planning and development, higher education, family support, health and human services, government, and philanthropy as well as national, state, and local community school networks. The Coalition advances opportunities for the success of children, families, and communities by promoting the development of more, and more effective, community schools.

About the Institute for Educational Leadership
The Institute for Educational Leadership is a nonprofit, nonpartisan organization based in Washington, D.C. Since 1964 IEL has worked to build the capacity of people, organizations, and systems—in education and related fields—to cross boundaries and work together to attain better results for children and youth. IEL envisions a society that uses its resources effectively to achieve better futures for all children and youth.

Contents

Introduction and summary

A community school is a place and a set of partnerships connecting a school, the families of students, and the surrounding community. A community school is distinguished by an integrated focus on academics, youth development, family support, health and social services, and community development. Community schools extend the school day and week, reaching students, their families, and community residents in unique ways. Community schools are thus uniquely equipped to develop their students into educated citizens who are ready and able to give back to their communities.

The community school strategy is central to efforts to improve America's public schools. Community schools use partnerships to align school and community resources in order to produce successful students, strong families, and engaged communities. They combine quality education with enrichment opportunities, health and mental health services, family support and engagement, early childhood and adult education, and other supports.

Research shows that low-income families regularly experience economic and material hardship. Missed rent, utility shutoffs, inadequate access to health care, unstable child care arrangements, and food insecurity are common experiences that inevitably affect students' readiness, attendance, performance, and completion rates at school.[1]

By sharing resources, expertise, and accountability, community schools can address challenges related to economic hardship and create essential conditions for learning by concentrating on a single access point—public schools—to effectively target their efforts. Any type of public school can become a community school, including traditional, charter, alternative, magnet or others. The vision of a community school must be at the heart of emerging place-based initiatives, including Promise Neighborhoods, Choice Neighborhoods, cradle-to-career programs, and P-20 networks integrating educational opportunities from preschool through college.

This paper outlines how school and community leaders develop a common vision for a community schools strategy and explores six key strategies that successful community school initiatives use to build effective partnerships with local government agencies, teachers' unions, and other organizations. It begins by describing the elements of a community school strategy, then draws on the experiences of several community school initiatives that use the following strategies to form and maintain key relationships:

- **Ensure that all partners share a common vision.** The entire community and all involved partners should agree on the same goals and expectations.

- **Establish formal relationships and collaborative structures to engage stakeholders.** Initiating and sustaining stakeholder participation often requires creating structured opportunities ranging from developing taskforces to creating formal agreements.

- **Encourage open dialogue about challenges and solutions.** To foster shared ownership, stakeholders must engage honestly and constructively with each other to solve problems and make midcourse corrections.

- **Engage partners in the use of data.** Sharing data enables all stakeholders to understand where things stand and hold each other accountable for making measurable progress.

- **Create and empower central-office capacity at the district level to sustain community school work.** Continued capacity can be created through establishing a high-level management position within a district's central office or through creating an office dedicated to supporting a community school agenda.

- **Leverage community resources and braid funding streams.** Community schools capitalize on the financial assets of community partners and funding streams to support programs and activities aligned with their common vision.

Successful community school partnerships deliver strong results

The community school strategy is already proving to be effective around our nation. Research shows that students in community schools in and around Tulsa, Oklahoma, for example, are outperforming noncommunity schools on state tests

in math by 32 points and reading by 19 points.[2] What's more, another study found that community schools outperform matched noncommunity schools on measures of dropout and graduation rates.[3]

Then there are the students who regularly participated in the Schools Uniting Neighborhoods community schools initiatives in Portland, Oregon, and nearby Multnomah County. These students showed strong gains in academics, attendance and behavioral areas, with increased state benchmark scores in reading and in math.[4]

And in Cincinnati, Oyler Community Learning Center graduated more students over the past three years than in the previous 85, improving its Ohio Performance Index (which measures student achievement) each year. The reason: Oyler is part of a districtwide community school initiative that is seeing results: In 2010–11 Cincinnati Public Schools earned an "Effective" status on the state's rating system for the second straight year.[5]

This paper demonstrates the effectiveness and importance of community schools to reforming our public school systems in ways that are creative, enduring, and based on measurable results.

The importance of partnerships in a community school strategy

Every community school begins under a different set of circumstances and develops its own distinctive culture. What community schools have in common is a belief in the basic principles of collective impact: a commitment to partnerships, accountability for results, respect for diversity, belief in community strengths, and high expectations for all. Collective impact is created when two or more organizations realize that they can accomplish more by working together and sharing resources than they can by working alone.

A community school strategy recognizes that many public and private community institutions share responsibility for helping:

• Children develop socially, emotionally, physically, and academically
• Students become motivated and engaged in learning
• Families and schools work effectively together
• Communities become safer and more economically vibrant

Community schools establish "cradle to career" conditions for learning that make it possible for every child to succeed. This strategy works by creating a collaborative leadership structure, embedding a culture of partnership, and aligning resources. Partners set and achieve high standards of accountability across multiple outcomes.

In a time of declining fiscal resources and greater demand for public services, districts with fewer dollars to spread around have learned that forming partnerships can also be fiscally prudent. A recent Coalition for Community Schools study finds that, on average, districts leverage three dollars from community partners for every dollar they allocate. Partners can contribute dollars or in-kind support in the form of access to family programs, health services, and more.[6]

The structures and functions associated with building a community schools strategy are built on a deepening foundation of collective trust. That trust is vital

to achieving the collective impact that emerges when school and community partners share responsibility for the education of our children and youth.

While a wide range of community stakeholders across the country are engaged in developing systems of community schools, this paper focuses on what a selected but growing number of communities are doing to build and maintain strong partnerships over time. The seven communities described here were selected because they represent community school initiatives that have established robust partnership networks with districts, unions, local government agencies, and other organizations. The authors conducted interviews and reviewed documents for all of these communities and recently visited four of them. Brief descriptions of these communities are highlighted in this report can be found in the table below.

Building strong community schools

Key attributes of communities building strong community school initiatives

| Initiative name	School districts	Sample partners	Year started	Number of community schools	Partnership structures
Tulsa Area Community School Initiative, or TACSI *Tulsa, OK*	Tulsa Public Schools Union Public Schools	Community Service Council of Greater Tulsa; Quality Counts/Ready by 21; Tulsa Metropolitan Chamber of Commerce; Tulsa Community College	2007	23	The TACSI Management Team, composed of school district superintendents the University of Oklahoma at Tulsa, and other stakeholders works to align its partners' visions on the ground. The community-wide Steering Committee represents the broader community including funders, school board members, and representatives from early childhood, health/ health education, out-of-school time, mental health/social services, family and community engagement, youth development, neighborhood development, and lifelong learning.
Schools Uniting Neighborhoods, or SUN *Multnomah County (Portland), OR*	Centennial School District David Douglas School District Gresham-Barlow School District Parkrose School District Portland Public Schools Reynolds School District	Multnomah County Department of Human Services; City of Portland Children's Levy; Portland Parks and Recreation Bureau	1999	64	The SUN Coordinating Council includes the City of Portland, high-level district administrators from six participating school districts, the director of the City of Portland Children's Levy, the director of Portland Parks and Recreation, members of the Coalition of Communities of Color, community and nonprofit partners, the Multnomah County Department of Human Services, the Commission on Children, Families and Community of Multnomah County, and others.

Initiative name	School districts	Sample partners	Year started	Number of community schools	Partnership structures
Chicago Public Schools Community Schools Initiative *Chicago, IL*	Chicago Public Schools	Federation of Community Schools; University of Illinois at Chicago; University of Chicago; local Neighborhood Councils	2001	102* Budget cuts have reduced the number of schools directly funded by CPS. Partnerships remain strong at most of the original community schools	Chicago Public Schools, or CPS, is the primary coordinating institution for community schools at the community level. CPS staff are responsible for professional development, funding, and selecting lead partners (along with school personnel). The Federation of Community Schools in Illinois advocates for community schools in Chicago and statewide.
Evansville Community Schools *Evansville, IN*	Evansville Vanderburgh School Corporation	Evansville Teachers Association; Evansville Education Roundtable; Public Education Foundation; Department of Parks and Recreation; Southwest Indiana College Access Network	2000	38 (district-wide)	The School-Community Council, also known as the "Big Table," includes over 70 partners and engages school leaders and community partners. A smaller steering committee guides the ongoing work of the initiative.
Oakland Full Service Community Schools *Oakland, CA*	Oakland Unified School District	County Public Health Department; SF Foundation; Bay Area Community Resources; Urban Strategies; City of Oakland, Bechtel Foundation; Safe Passages	2010	Plan to implement across the district	A community leadership team is being formed to guide the Full Service Community Schools Initiative.
Cincinnati Community Learning Centers, or CLCs *Cincinnati, OH*	Cincinnati Public Schools	Cincinnati Community Learning Center Institute; United Way; YMCA; Cincinnati Children's Hospital Medical Center; University of Cincinnati; City of Cincinnati Health Department; Project Grad; Adopt a Class	2001	55 (district-wide)	The CLC Cross-Boundary Leadership Team consists of leaders representing partnership networks including afterschool, health, mental health, nature, college access, early childhood, tutoring, mentoring, parent engagement, and other types of collaboratives. It helps to organize services at each community learning center. CLCs select the partners from among these groups that best align with their needs. The CLC Funders Network includes the Cincinnati Public Schools, the Hallie Foundation and the Schiff Foundation, the United Way of Greater Cincinnati the Greater Cincinnati Foundation, and the Cincinnati Community Learning Center Institute.
Say Yes to Education *Syracuse, NY*	Syracuse City School District	Community Folk Art Center; Syracuse Teachers Association; Onondaga County; Boys and Girls Clubs; 100 Black Men of Syracuse, Inc.	2007	35 (district-wide)	The Community Advisory Group is comprised of local, county, state, and federal leaders including the county executive, mayor, and school board president. The Operating Group is comprised of the school district, Syracuse University, Say Yes, union, city, and county leadership.

Source: Coalition for Community Schools at the Institute for Educational Leadership

Organizing collaborative leadership structures

The collective experience of these and other communities illuminates a basic strategy and set of institutional arrangements that can assist other localities to begin and expand community school initiatives.[7] The ongoing work of a scaled-up community school initiative takes place through the Collaborative Leadership Structure. This is where shared ownership takes root and where the initiative's vision and results are set. Figure 1 identifies common participants, including school districts and unions, and shows how leadership is shared across key functions.

FIGURE 1

Collaborative leadership structure for community schools
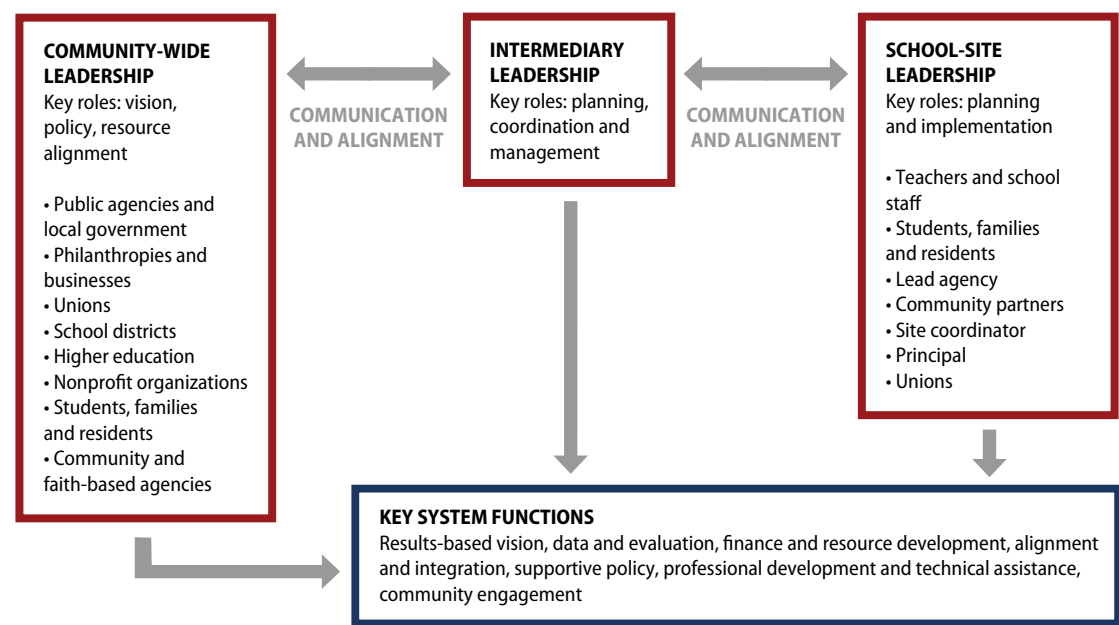
Source: Coalition for Community Schools at the Institute for Educational Leadership

A *communitywide leadership* group develops a shared vision, builds a common policy framework, and aligns their resources. A similar entity at the school site, with strong parent and neighborhood participation, is responsible for planning, implementation, and continuous improvement. In most initiatives, a community

school resource coordinator manages day-to-day community school activities. An intermediary entity provides planning, coordination, and management, and ensures communication between communitywide and school-site leaders.

Forming partnerships

Collaboration matters greatly in school reform. Successfully implementing a community school strategy is impossible without the active involvement of school districts and their local partners. Research shows a positive correlation between average student academic achievement and superintendents who engage all relevant stakeholders—including central-office staff, building-level administrators, and school board members—in creating goal-oriented districts focused on teaching and learning.[8] School leaders involved in community schools recognize that "all relevant stakeholders" includes community partners. (see below box)

Who are community school partners

Community school partners can be any organization in the community that is concerned with the education of the community's children. They can be:

- Local government agencies such as the county health department
- Teachers' unions
- Nonprofit organizations such as the local

Boys and Girls Club
- Private agencies serving youth and families
- Community-based organizations
- Faith-based institutions such as churches, temples, and mosques
- Neighborhood groups
- Businesses in the community
- Civic organizations such as United Way

- Higher education institutions such as nearby universities or community colleges

Partnerships may vary by community but they share a common purpose: to involve all stakeholders interested in improving academic achievement and social outcomes for children.

The experience of local community initiatives suggests that collaboration between school districts and community partners are initiated by districts or by partner organizations. Either way the ultimate goal is collaboration toward a common vision and shared results. Districts and their union partners play an essential role in planning and implementing a communitywide strategy. Together, they also have the ability to dramatically scale up the number of community schools and students being served. Indeed, collective impact results from the organization of key stakeholders into communitywide leadership groups that have a shared vision, build a common policy framework, and align their resources.

Community partners can initiate relationships with districts

Until recently most school districts have become involved in community school initiatives through efforts initiated by external stakeholders. Nonprofit organizations, government agencies, United Ways, philanthropies, and others often seek out school district involvement. They recognize the potential of reaching children through schools and the greater effectiveness of educational strategies that link academic and nonacademic competencies.

One example is Tulsa, Oklahoma's Metropolitan Human Services Commission, a collaborative of community partners who realized in 2005 that their work in a variety of child abuse prevention, family support, and early childhood-development activities had limited effect. Members envisioned a more comprehensive approach, including a school-reform strategy that would start from birth and continue through entry into the workforce. The collaborative decided to make education a priority, and chose community schools as their reform strategy.

At that point the superintendents from the Tulsa and Union school districts, which both serve the city of Tulsa, became actively involved in vetting reform strategies throughout their systems and in building ownership in what is now the Tulsa Area Community Schools Initiative, or TACSI. Staffed by the Community Service Council of Greater Tulsa, TACSI developed 23 community schools in the Union and Tulsa school districts, with eight schools preparing for implementation and two nearby districts in the initial phases of developing their own community schools initiatives. Both Union and Tulsa school districts are contributing Title I federal funds and other state and local school funds to TASCI schools and are fully invested in their success. As Union Public Schools superintendent Cathy Burden says, "By partnering with outside agencies and opening ourselves up to understanding the needs of the whole child and his family and community, we become a more integral part of a child's life and can be more effective in the classroom."

Another example is Schools Uniting Neighborhoods, or SUN, in Multnomah County, Oregon, which includes Portland. In 1998 local governments in Portland and Multnomah County were facing shrinking budgets, growing cultural and linguistic diversity, and a widening achievement gap in schools. To make matters worse they had no clear sense of where and how resources supporting school-age students and families were being used. The county, together with the city, approached six local school districts for a conversation about community schools. A consensus emerged among school, city, and county leaders to launch a

coordinated community schools strategy as a way to respond to these concerns; target resources more effectively; and increase educational success and self-sufficiency for children, families, and communities.

These initial partners decided that visibly co-locating community services in schools would counteract the isolation of schools and help residents appreciate the centrality of schools and their importance to the entire community. Schools Uniting Neighborhoods began in 1999 with eight schools with the county acting as an intermediary. The city and county reached out to school leaders and now representatives from six school districts serve on a communitywide Coordinating Council that includes city, county, and state leaders, as well as businesses and community organizations. Since 1999 the number of SUN schools has grown to 64 across six districts and the SUN Council has embraced the vision that all 150 county schools will become community schools.

Another approach was taken in Chicago in the 1990s, when the Polk Brothers Foundation funded and implemented a community schools model at three Chicago schools that improved parental involvement, student outcomes, and school climate. Encouraged by those successes, corporate and philanthropic leaders realized that school-district involvement was essential for expanding this promising model.

In 2001 these leaders invited the Chicago Public Schools system to join in a public-private partnership to scale up community schools by matching private dollars with city funds. Then city superintendent Arne Duncan agreed, and a goal was set to develop 100 community schools in five years. Chicago's Community Schools Initiative, or CSI—housed within the city's public school system—eventually met and exceeded that goal. By 2010 CSI had grown to 154 schools, each of which works in partnership with a lead community agency skilled in youth and adult programming to meet the specific needs of each school community. Due to severe budget constraints CPS now funds 102 community schools, though many of the initial schools are using other funds to remain community schools.

Most recently, in 2007 the Say Yes to Education initiative started to work with partners in Syracuse, New York with the goal of increasing high school and college graduation rates for urban youth. Say Yes, a national nonprofit organization, mobilizes community resources to support early childhood education, out-of-school time programming, mentoring, academic support, primary and mental health care, as well as other services. It convened a leadership group that included the school district, the local teachers union, Syracuse University, the city, and the

county, to share ownership of the initiative. The school district has made Say Yes the core of its strategy to improve outcomes for children.

"That's where the rubber meets the road," says Kevin Ahern, president of the Syracuse Teachers Association, who serves on this group "You need to have decision-makers from all these places at the table." Speaking to the sustainability of the initiative under this collaborative structure, he adds, "We've managed to get this done [Say Yes] under two different mayors, two different superintendents, three different union presidents. That's the kind of commitment it takes."

Districts initiate collaboration with community partners

In other instances school districts have taken the first steps toward a community school vision. This is most likely to happen when school leaders personally experience the positive benefits that result from partnership efforts. As the number of community school initiatives grows, many more school leaders are learning firsthand how collaborative partnerships can help educators do their work—and many more are taking steps to organize, coordinate, and institutionalize community school relationships in their own districts.

In Evansville, Indiana, for example, a principal at a single elementary school in the Evansville Vanderburgh School District sought community support to better meet the economic, social, and learning needs of students and families at her school. In the early 1990s, building on a United Way afterschool initiative, principal Cathlin Gray set out to develop a more comprehensive vision of a "full-service" community school. With United Way's continuing aid, she eventually involved over 70 organizations at her Cedar Hall Elementary.

Convinced by Cedar Hall's strong family involvement and community support, the district expanded the approach systemwide. A community school strategy is now a district priority, and is included in school-improvement plans and budgetary allocations, and implemented in all 38 Evansville Vanderburgh schools. It has lasted through four superintendents and has become part of the district's culture. When asked whether he would change strategies just one day after being hired, David Smith, the newest superintendent, said, "The change is going to be we're not going to change. We're totally committed to early childhood, family, school, community partnerships. … quite frankly, we can't solve or resolve [school] issues in isolation. It takes a community effort."

Similarly, a number of assets set the stage for a comprehensive community school strategy in the Oakland Unified School District in Oakland, California, including having many community agencies already working in schools and even an existing Department of Complementary Learning to coordinate their work. But it took the vision of new superintendent Tony Smith and his decade of experience implementing a community school approach in another school district to convincingly engage the community in a collective effort and plan for district-wide implementation. In 2010 the school board institutionalized a community school strategy as the central part of the district's reform agenda. While still in the early stages of its work, the Oakland Unified School District has buttressed its new school motto—"Community Schools, Thriving Students"—with staff and policies to support the new strategy.

Strategies for building and maintaining successful partnerships

Collaborative leadership structures in community schools are designed to connect communitywide leaders—including union leaders, superintendents, and other local stakeholders—to school-site operations. But how can that be achieved? Individuals in the communities we interviewed shared six main strategies for building and continuing partnerships:

- Ensuring a common vision among all partners
- Establishing structured opportunities to engage stakeholders
- Encouraging open dialogue about challenges and solutions
- Engaging stakeholders in the use of data
- Creating central-office capacity to sustain community schools work
- Leveraging community resources and braiding funding streams

Let's examine each of these strategies in turn.

Ensure a common vision among all partners

Partners must be invested in a common vision and set of expectations for community schools. This will help to sustain partnerships in the long run, enhance community school efficacy, and encourage each stakeholder to clearly define its role in meeting specific goals. District leaders, including superintendents and school boards, must work to ensure the initiative's results-based vision is aligned and integrated with the district's overall school improvement plan and other core guidance documents. Community partners must adapt their mission to align with the community school vision.

Since 2006 district leaders from both Tulsa and Union public schools have worked with other key stakeholders on a Management Team to ensure the TACSI strategy aligns well with their school districts' missions. These superintendents were visibly involved and encouraging of community school efforts, inviting their schools

to become community schools as a vehicle for school reform. Significantly, in its 2010-2015 Strategic Plan, Tulsa Public Schools has included the expansion of community schools as a strategic objective to meet its core goal of improving student achievement.[9]

Evansville, Indiana, illustrates how school districts make community schools a part of their results-based vision. The district, after engaging the community in numerous listening sessions, developed a strategic plan around five core areas:

• Early childhood education
• Technology
• Professional development
• Innovative school models
• Family, school, and community partnerships

As they write in their "2011 State of Our Schools" report, "The EVSC is committed to the Full-Service Community Schools strategy as a way to wrap supports around children to help them physically, mentally, and emotionally." The Center for Family, School, and Community Partnerships is primarily responsible for the last core area and aligns its strategies, including the community schools strategy, with the set of long- and short-term results laid out by the district in its strategic plan.

When Superintendent Tony Smith came to Oakland, for example, he saw that existing partnership efforts were fragmented in a district struggling with the challenges of violence and poverty. He was determined to streamline these efforts so he worked closely with the school board to establish a plan for Oakland to become a full service community school district—a district comprised entirely of community schools. The board initiated an eight-month fact-finding process with 14 taskforces and broad community participation. The Full Service Community Schools taskforce included representatives from the Oakland Community After School Alliance, East Bay Asian Youth Center, and the Oakland Unity Council, among others, and met weekly for over seven months.

These taskforce members visited existing community school sites to understand implementation, consulted with key stakeholders, and held numerous community gatherings to hear local feedback on the idea of developing a districtwide community schools strategy. In the spring of 2011, the school board voted unanimously to move forward with this approach, and the Oakland United School District is now in the process of building up an effective system of community schools.

Establish formal relationships and collaborative structures to engage stakeholders

A successful community school initiative depends on the active involvement of families, school boards, unions, local organizations, and state and local government agencies. Initiating and sustaining involvement often requires creating structured, collaborative opportunities ranging from developing taskforces to creating or modifying formal agreements. The school districts and surrounding communities we researched for this report took a variety of steps in pursuit of these goals.

Cincinnati's superintendent, school board president, and union president embraced a slightly different approach. They worked together to maximize the impact of their "community learning centers," which have become part of the district's culture. Each school is home to a Local School Decision-Making Committee comprised of school staff, partners, and community members. The committee identifies school needs in specific areas—health, mental health, after school, the arts and others—and works with networks of providers to coordinate services requested by schools so that appropriate resources are distributed as efficiently as possible. The networks of community partners come together in a Cross-Boundary Leadership Team to integrate these efforts.

In Syracuse the school district committed to a six-year sustainable plan and agreed to serve on leadership and operating groups that would engage numerous community partners. The president of the Syracuse Teachers Association is an active member of the operating group. These groups meet regularly to review data, have frank discussions about progress, and make decisions about implementation. They are designed as stable leadership structures to guide the community schools initiative as it transitions from being funded primarily through philanthropy to being funded primarily by community partners.

Schools Uniting Neighborhoods in Portland, Oregon, and nearby Multnomah County worked with districts to create intergovernmental agreements that create policies governing the work in community schools under a number of areas including building use, alignment with instruction, the school's improvement plan, and partnerships. The agreement requires the district to provide partners with rent-free access to school sites, and requires all partners to align their activities with existing services and school improvement plans. It further stipulates that each SUN Community Schools Site Manager will act as coordinator for collaboration and integration of all extended-day activities and partners within a school

building and requires that other agencies link with the SUN community schools site manager.[10] The superintendent and relevant city and county leadership sign each agreement.

Encourage open dialogue about challenges and solutions

Shared ownership is critical for sustaining community school work. While schools are primarily held responsible for ensuring that every child is well-educated and prepared for productive adulthood, districts know they must engage constructively with other stakeholders to achieve better outcomes. Successfully sharing ownership among multiple partners requires collective trust and the ability to discuss issues openly in order to find solutions. Leadership structures with top-down and bottom-up communication flow make it possible for stakeholders to push back and negotiate to meet both community and district goals. Again, the subjects of our research built on their foundation of trust to find creative solutions to emerging tensions.

The Tulsa Public Schools, one of two districts involved with the Tulsa Area Community Schools Initiative, or TASCI, planned to hire additional school-site resource coordinators through the district with Title I funds and hire a director for community schools. Since coordinators worked directly for TASCI up until this point, there were questions about how the districts would select new coordinators, what their job description would be, and how they would be supervised. TACSI staff brought their concerns to both the superintendent and school board. Frank discussion ensued, resulting in TASCI staff receiving assurances that school-site coordinators hired by schools would continue to work in line with TACSI goals, be supervised by TACSI and be part of the TACSI coordinators' network. The district, as it always has, continues to sit on the TACSI management team and share responsibility for setting direction for the initiative.

A community school strategy also creates a space for union representatives, partners, and the district to discuss priorities and ensure that the strategies being used aren't top down and lacking in teacher input, but rather are the best ideas of all partners and are sustainable. Gambill makes sure that teachers have an opportunity to give input in community decision-making. He says of these efforts:

> *We have great community partners but what we've found at times is that a partner outside of the school may believe that item A is a problem and if they define that and it really isn't, then they have invested in developing a program*

for a problem that doesn't exist. And that's where that connection to the voice of teachers is: 'Here are some places where we're struggling, and what can you provide as a community partner to assist in it?'

Highly involved community partners in Evansville's 70-member School-Community Council have welcomed the school district's increasing efforts to institutionalize a full-service community school agenda—and have pushed back when they saw the need. When a superintendent transition was about to occur, community partners voiced concerns about having a new school superintendent who would be supportive of the work. Their efforts led to the hiring of a superintendent who was a strong advocate for community schools. These partners consistently communicated with the new superintendent about sharing responsibilities and roles, and are now in the middle of assessing the responsibilities of the School Community Council and creating a steering committee to more robustly guide the initiative.

Engage partners in the use of data

Generating targeted and useful data on community school initiatives can be challenging but necessary for measuring student, school, and family outcomes. School districts we researched work with a range of partners to design data collection and analysis strategies and make data more accessible to educators. Sharing data enables all stakeholders to understand where things stand at various points, and helps them hold each other and themselves accountable for making measurable progress on outcomes.

In some circumstances external partners can bring a wealth of data expertise that can help schools evaluate partnerships and activities based on goals for achievement, attendance, behavior and more. Cincinnati Public Schools and its data partners, Microsoft Corp. and Proctor & Gamble, are in the process of designing a Learning Partners Dashboard—a database that will connect the district's data system with partners' data systems to generate information in four goal areas:

- Academic
- Parent involvement
- Community engagement
- Wellness

The system will be updated nightly with district academic, behavioral, and attendance data and linked to data on student participation in community-partner programs.

Reports generated from this data-collection system will show student-risk factors, service-utilization rates, and connect activities and partnerships to student achievement. CPS actively involves Proctor & Gamble and Microsoft in school visits so that their data experts can help resource coordinators and educators use the data system in the most effective ways. According to superintendent Mary Ronan, this links back to sustainability and funding because "if we can show impact, then we can go ask for additional dollars because we can say that this model is working."

In Portland and Multnomah County, community school and district leaders sat down to discuss and agree upon a common set of measures that they could report on as a function of students' participating in SUN Community School activities. These included standardized test scores, attendance, credits earned, and others. They wrote data-sharing agreements signed by partners. Annually, Multnomah County extracts from its database, ServicePoint, the relevant demographic and participation data for students participating in SUN Community School activities, and sends it to the school districts, who then match it and send back the corresponding academic data.

This early agreement and process provided the foundation for SUN to collaborate on other data related issues such as chronic absenteeism. When SUN analyzed attendance data they found that early chronic absenteeism was rife in both early childhood and elementary settings. Consequently, leaders in all six participating districts worked with SUN and other partners in the community to address the problem.

In other cases collaboration with outside partners can steer community school leadership toward a stronger focus on data and results. In Tulsa staff from TASCI worked with an external evaluator to answer questions about the development of their community schools as well as their impact. Initially, TACSI staff were interested in implementation fidelity and thus used findings from the first study to redesign their training for implementers at the school level. The findings then prompted them to examine the impact of community schools and they found that community schools implementing their strategy with high fidelity significantly outperform noncommunity schools on measures of reading (+19 points) and math (+32 points).[11]

Reflecting on these results, Tulsa superintendent Keith Ballard said, "We now have research that proves that community schools work. The very schools that

have the most success, that have brought children to achievement levels above and beyond what other schools have done, are the community schools. You have to meet the needs of the whole child."

Create and empower central-office capacity at the district level to sustain community school work

Creating a sustainable community school initiative requires continued capacity within a district's central office to coordinate community school work. One way to ensure this capacity is through creating a high-level management position within a district's central office; a senior official dedicated to community school work would ensure that community school principles are embedded in practice and policy, as well as in strategic-planning documents. Another way could be through combining existing resources to create an office dedicated to supporting a community school agenda. The school districts and communities we researched took both approaches.

In 2002 then-superintendent Bart McCandless elevated the status of community schools in the Evansville Vanderburgh Unified School District to a new level by creating a position to address community school issues, and naming Cathlin Gray, a community school leader, to the position. In 2007 new superintendent Vince Bertram acknowledged the increasingly central position of a community school strategy within the district by appointing Gray to be the associate superintendent for families, schools and community partners.

Gray now sits on the district's leadership team and her team assumes responsibility for all school-financed health and social services, early childhood programs, after school programs and related activities, and the coordination of federal, state, and other monies. This organizational shift bundled together the funding and coordination of school-managed resources, allowing the school district to use its funds strategically to coordinate with community partners.

Rather than adding a new office, Oakland school district leaders decided to merge two existing offices that worked on issues related to their community schools strategy and create a stronger, more cohesive office. The purpose of this new Department of Family, Schools, and Community Partnerships, led by a new associate superintendent, is to align resources so that partnerships better meet the needs of children and families and advance the district's five-year plan to improve outcomes.

Creating internal district capacity to support community schools was central to then-CEO Arne Duncan's plan for making every Chicago Public School a community school. He created the Office of Afterschool and Community School Programs to pull together disparate afterschool programs under a comprehensive Community Schools Initiative. After Duncan left Chicago to become the U.S. Secretary of Education, the district reorganized, but the community school strategy remained intact because the Community School Programs Manager and associated staff stayed on to carry on the work of the initiative and provide a stable point of contact for their partners.[12]

Leveraging community resources and braiding funding streams

Community schools garner financing and programmatic support from multiple sources. On average only about one-quarter of all resources in community school initiatives come from school districts. The remainder is leveraged from other sectors including local, state, and federal funding streams; foundations; and a mix of public agencies and community-based organizations—a 3-to-1 ratio in support of school success. School districts commonly provide space and cover maintenance and overhead costs at no cost to community partners, while community partners provide needed services, staff, and capacity through their own funding sources.

Community schools and their partners also braid multiple funding streams to support their common vision. Title I funds as well as various private sources are often used to hire resource coordinators at individual school sites. Competitive grant funding from all levels of government provides important flexibility in meeting school site costs such as startup costs for a health clinic or expanding learning opportunities. Local foundations, local government, and others support the work of the intermediary and other community partners.

Community schools use these and other funding sources to focus on sustainability and growth.

Evansville's early decision to install a community school leader as associate superintendent for Family, School, and Community Partnerships provided an opportunity to begin coordinating and strategically deploying a raft of school resources. Rather than looking for funds to support specific programs, Evansville demonstrates how partnering with the federal government can yield a variety of

revenue streams that can be blended to advance a comprehensive community school strategy. The district was able to obtain formula and discretionary federal funds from the following sources:

- Title I
- School Improvement Grants
- 1003 G—School Improvement
- IDEA; Title II—Professional Development
- Title III—English Language Learner
- Title IV—Safe and Drug Free
- Even Start and Head Start
- Centers for Disease Control
- 21st Century Community Learning Centers
- Carol M. White Physical Education Grant
- Grant to Reduce Alcohol Abuse
- Safe School/Healthy Students
- McKinney Vento Homeless Grant
- Full-Service Community Schools Grant
- Other local, state, and philanthropic sources that support key partnerships.

Taking a different approach, organizations participating in Cincinnati's partnership networks redirect existing resources to provide services at Community Learning Centers. Agencies and organizations in the partnership networks assume the responsibility for financial sustainability including third party billing where appropriate. For instance, a partnering organization that works on mental health issues can bill Medicaid for mental health services that students and families receive. The school district directly funds a Director of Community Schools to oversee district-wide implementation and uses Title 1 monies to underwrite the costs of resource coordinators at approximately 31 schools.

The Greater Cincinnati United Way, the Greater Cincinnati Community Foundation, the Community Learning Centers Institute, and other private donors pay for school site coordinators at the additional schools. The initiative is exploring expanded financing strategies to provide a coordinator at every school and to ensure the initiative's continuing growth and development. Julie Sellers, president of the Cincinnati Federation of Teachers, describes the advantages of coordinators saying, "I think it is beneficial for the students and it gives the support to teachers so that they can focus on instruction. I wish we had one in every school."

Syracuse's Say Yes initiative was intentionally started with sustainability in mind. The district's commitment to the initiative required it to take on an increasing share of the overall budget for the work, increasing nearly 10 percent each year till it is fully responsible for funding within six years. The district and union have had fiscal audits and made the changes necessary to organize the district and workforce to do the work required to improve results. This included changing staffing ratios and patterns in schools. City and county funds are also being retooled to align with the Say Yes strategy and nonprofit are redirecting resources as well.

Recommendations for local stakeholders

Nearly every school district has partners in its schools. But most do not have a coherent framework and strategy that lays out how the district and its community partners will work together to support student success. The recently issued guide from the Coalition for Community Schools, "Scaling up School and Community Partnerships: The Community Schools Strategy," lays out a detailed plan of action that local stakeholders can take.

Here are a few recommendations for getting started:

- **Reach out.** Talk with each other, with principals and teachers, with families, and with key leaders whom you know are involved with schools and concerned about young people and your community.

- **Look at the data.** Review data on school and nonschool factors that influence student achievement. Attendance, chronic absence, suspension, truancy, parent involvement, health, and other indicators should be examined and discussed.

- **Learn from other schools.** Arrange to visit a nearby community schools initiative with a strong record of success. Nothing can substitute for seeing the energy, focus, and commitment of educators and community partners in an effective community school.

- **Review existing partnerships.** Awareness of existing school and community partnerships can lead to a more coordinated strategy. Look closely at a few examples of strong partnerships and see what you can learn from them.

- **Get started.** Together, school and community leaders should craft an initial plan to approach key challenges that must be addressed to improve educational life outcomes for students.

About the authors

Martin J. Blank is the president of the Institute for Educational Leadership in Washington, D.C. Marty also serves as the director of the Coalition for Community Schools, which is staffed by IEL. Marty is the co-author of Making the Difference: Research and Practice in Community Schools and Together We Can: A Guide for Crafting a Pro-family System of Education and Human Services. He has a B.A. from Columbia University, a J.D. from Georgetown University Law Center, and served as a VISTA Volunteer in the Missouri Bootheel.

Reuben Jacobson serves as the senior associate for research and strategy for the Coalition for Community Schools at IEL. He develops and implements the Coalition's research agenda, communicates research findings to the field, and works on overall strategy. Reuben has also worked at the American Institutes for Research and taught in D.C. Public Schools. Reuben has a B.A. from the University of Wisconsin, a master's in education policy from the George Washington University, a master of arts in teaching from American University, and is currently pursuing his Ph.D. in education policy at the University of Maryland.

Atelia Melaville is an independent consultant living in Annapolis, MD. She has contributed to numerous Coalition for Community Schools publications, including the recent guide: Scaling up School and Community Partnerships: The Community Schools Strategy.

Acknowledgements

Endnotes

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2 C.M. Adams, "The Community School Effect: Evidence from an Evaluation of the Tulsa Area Community School Initiative" (Tulsa, Oklahoma: The Oklahoma Center for Educational Policy: University of Oklahoma, 2010).

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4 "Results," available at http://web.multco.us/sun/results.

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6 Blank, M, Jacobson, R, Melaville, A, and Pearson, S, "Financing Community Schools: Leveraging Resources To Support Student Success" (Washington: Coalition for Community Schools, Institute for Educational Leadership, 2010).

7 For more detail about the experiences of local communities see the Coalition's interactive guide, "Scaling Up School and Community Partnerships: The Community Schools Strategy," at http://www.communityschools.org/scalingup. The guide includes a six-stage process for implementing a community school strategy and a benchmark chart that districts and partners can use to track their progress.

8 J. Timothy Waters and Robert J. Marzano, "School District Leadership that Works: The Effect of Superintendent Leadership on Student Achievement." Working Paper (Mid-continent Research for Education and Learning, 2006).

9 Tulsa Public Schools, "Tulsa Public Schools: 2010-2015 Strategic Plan," 2011.

10 See, for example: "Intergovernmental Agreement between the David Douglas School District, Multnomah County and City of Portland," available at http://www.communityschools.org/assets/1/AssetManager/Multnomah_Cty_Policy.pdf.

11 Adams, "*The Community School Effect.*"

12 The Chicago Community Schools Initiative now sits in the district's Office of Student Support and Engagement in the Office of Pathways to College and Career.

The Center for American Progress is a nonpartisan research and educational institute dedicated to promoting a strong, just, and free America that ensures opportunity for all. We believe that Americans are bound together by a common commitment to these values and we aspire to ensure that our national policies reflect these values. We work to find progressive and pragmatic solutions to significant domestic and international problems and develop policy proposals that foster a government that is "of the people, by the people, and for the people."

Center for American Progress

St. Vrain Valley Schools
academic excellence by design

Leadership St. Vrain Training

LSV provides parents organizational knowledge (know how), key relationships (know who), and P2 training to increase capacity for public participation and leadership in district problem solving and decision making.

The LSV model for parent engagement in public school districts is being duplicated in and outside the State of Colorado.

Public Participation

P2-Budget Deliberations

Community-wide deliberations on state education cuts and decision making on revised spending priorities.

Advocacy

Board of Education

John Ahrens, one of three recent LSV participants to be elected to St. Vrain Valley Schools' Board of Education.

P2-School Boundary Changes

Community deliberates on controversial school boundary changes.

Grassroots St. Vrain

Former LSV participants create independent, non-partisan advocacy group for education.

P2-School Safety Deliberations

Community deliberates on school safety practices in wake of Sandy Hook tragedy.

GR st.vrain
learn share grow

Hollidaysburg Area School District

COMMUNITY LEADERS COMMITTEE

Membership Application Form

Name _____
(Please print)

Home Address_____Phone_____

How long have you resided in the school district? _____years

Do you have any children now attending our schools? _____Yes _____No
(If YES, please list their names and the school/grade they attend)

_____

_____

Occupation (indicate RETIRED if applicable) _____Employed by_____

Business Address_____ Phone _____

Educational Background:

    Elementary School_____
              Name   Address   Highest Grade Completed

    High School_____
              Name   Address   Highest Grade Completed

    Post High School_____

        _____

What civic, social or other community organizations do you belong to? If you have held or hold any office, please note:

_____

_____

Parent Resources

Get Involved

Resources For:

Parents

Students

Community

Staff

Evergreen School District Parent and Community Involvement

We believe that the partnership between the District and our community is vital to the succes of all children. As such, we are pleased to provide a number of opportunity for parents and commmunity member to become involved in our schools.

Evergreen School District facilitate many district-wide councils and advisory committees that are open to the public. These councils include the Parent Advisory Committee (PAC), District Advisory Committee (DAC), District English Language, Advisory Committee (ELAC) and the Measure I oversight committee.

Additionally, each site host and facilitate a number of parent groups that include School Site Councils, English Language Advisory Committees, District Site Leadership Teams, Parent Teacher Associations and more. For more information about the specific councils at a school site, please contact the school directly.

Parent Advisory Committee (PAC)

The Parent Advisory Committee (PAC) is comprised of parents and administrators from all schools who come together the first Wednesday of the month to share, discuss, and collaborate on various topics of interest within the Evergreen School District. Meetings are held in the District Board Room (3188 Quimby Road) from 9:30–10:30 and are open to the public.

The goal of the PAC is to share topics that are relevant and interesting to parents, students, and staff, to inform and educate those in attendance on the topics chosen and assist in promoting district wide pride to help meet and exceed our educational goals. Those in attendance are invited to share event dates, ideas, and collaborate with each other.

October 2, 2013	Agenda	Materials	Minutes
November 6, 2013	Agenda	Materials	Minutes
	Agenda	Materials	Minutes
December 4, 2013	Agenda	Materials	Minutes
February 5, 2014	Agenda	Materials	Minutes
March 5, 2014	Agenda	Materials	Minutes
May 7, 2014			

District Advisory Committee (DAC)

The District Advisory Committee is comprised of representatives from each of the eighteen School Site Councils. This committee meets five times a year with the purpose of advising the school district in the development of educational programs that receive categorical funding. While voting members are elected to their positions, all meetings are

open to the public. The committee meets the first Wednesday of October (a district-wide training) and the second Wednesday of November, January, February, March, and May. Meetings are held in the Phyllis Lindstrom Technology Learning Center (3188 Quimby Road) from 6:00-7:00 p.m.

DAC Bylaws	**English**		
School Site Concil	**English**		**Minutes**
November 13, 2013	**Agenda**	**Materials**	**Minutes**
	Agenda	**Materials**	**Minutes**
December 11, 2013	**Agenda**	**Materials**	**Minutes**
February 12, 2014	**Agenda**	Materials	**Minutes**
	Agenda	Materials	
April 15, 2014			
May 14, 2014			

District English Language Advisory Committee (DELAC)

The District English Language Advisory Committee is comprised of parents and administrators who come together to discuss and collaborate on various topics related to English language learners. The Committee is responsible for assisting in District needs assessment, establishing the goals for the English Language Development Program and for reviewing and commenting on the District redesignation criteria, standards and procedures. All parents are welcome and invited to attend.

DELAC Bylaws	**English**	**Spanish**	
October 30, 2013	**Agenda**	Materials	Minutes
January 29, 2014	Agenda	Materials	Minutes
February 26, 2014	Agenda	Materials	Minutes
	Agenda	Materials	Minutes
April 30, 2014			

Measure I Oversight Committee

Measure I was passed by Evergreen voters in 2006 to bring funding to the District for new construction and modernization projects. Measure I calls for $150,000,000.00 in general obligation bonds to be sold in increments to complete projects at each of our sites. Bond fund expenditures are monitored by a Citizens Oversight Committee that meets once per quarter.

2013		2014	
	March Minutes		March Minutes
	June Minutes		June Minutes
	September Minutes		September Minutes
	December Minutes		December Minutes
	Report to Board of Trustees		Report to Board of Trustees

To view archived Measure I Oversight Committee minutes, please **click here**.

Families, Educators, and Communities Fostering Student Success

STATE ADVISORY COUNCIL

S A C P I E

FOR PARENT INVOLVEMENT IN EDUCATION

Best Practices Framework for Effective Family, School, and Community Partnering

The State Advisory Council for Parent Involvement in Education (SACPIE) is to *review best practices and recommend to policy makers and educators strategies to increase parent involvement in public education, thereby helping to improve the quality of public education and raise the level of students' academic achievement throughout the state* (C.R.S 22-7-301, 2012). A component of that responsibility is to suggest an overall framework built on the research findings and knowledge of effective educational practices. A **classroom, school, district, state agency or community organization** can use this framework in strategically planning for a site or situation's partnering needs while focusing on student achievement. The framework can guide choosing the most relevant programs, actions, and resources in reaching identified goals and evaluating results.

1. **Align strategies and practices with the *National Standards for Family-School Partnerships* (PTA, 2008) for every student and family.**

   - Ensure inclusion of those with cultural, linguistic, socioeconomic, and learning differences.

2. **Apply research and laws to practice, focusing on student success.**

   - Do what works, consistently.

3. **Share knowledge and responsibility.**

   - Use two-way communication.
   - Partner actively and equitably.

4. **Use data to make decisions.**

   - Be strategic and intentional.
   - Action plan, based on what exists and what is needed.
   - Continuously improve.

Please Note: This draft framework was developed from the following; 2013 SACPIE Executive Committee discussions, review of Colorado legislation, and research findings.

Special Board of Education Meeting
Annual Planning Workshop
January 31, 2015

2. Student Representation and Governance

a. Citizenship Education

Please review first eight (8) pages of document.

Introduction

Although the vast majority of K-12 teaching in the United States takes place in classrooms, children learn from peers, their parents and other adults, and they learn in and out of school. Recognizing the value of experiential learning, high schools often place students in internships or provide job-shadowing opportunities in the community. Science teachers involve students in local environmental projects such as water or soil testing. Civics teachers encourage students to attend city council meetings to learn about local politics. And nearly every high school offers students opportunities to participate in vocational student organizations, student government, team sports and other extracurricular activities aimed at giving students opportunities to learn, and apply their learning, outside the classroom.

Most state and local school systems include language in their mission or vision statements about cultivating active, involved community members and future leaders. The extracurricular activities mentioned above can provide many opportunities for leadership training, with student government probably the most clearly aimed at fostering student leadership. And civics or government courses can certainly provide opportunities for students to learn – and in some cases observe directly – how politics and government work. Yet the widely held belief that a quality education should include real-world experiences rarely leads school systems to involve students in governance and policymaking. Students are rarely involved in decisions about school or district programming, state or district graduation requirements, faculty hiring, teacher licensing or even the lunch menu – decisions that clearly affect them.

Many policymakers might argue that educational governance should be left to adults. But if the mission statements of many state and district boards of education are any indication, education is as much about fostering citizenship as it is about preparing students for college and the workplace. The skills of citizenship – including leadership and informed decisionmaking – must be learned. Involving students in governance is one way to provide opportunities for students to acquire and practice these skills. And while there are challenges for leaders to consider in bringing students into the decisionmaking process, there also are important benefits for the students, the community and the policymaking body itself.

This policy brief presents some of these benefits, with examples from across the country. Discussion also centers on the challenges of involving young people in governance and a set of questions for state and local policymakers to consider. The conclusion provides recommendations for those considering this strategy and the useful resources helps you locate additional information on this issue.

> **The skills of citizenship – including leadership and informed decision-making – must be learned. Involving students in governance is one way to provide opportunities for students to acquire and practice these skills.**

Why involve students in governance?

Most secondary schools offer students the opportunity to participate in some sort of student government. And where student government was once restricted mostly to a few popular students elected by their peers, many schools now offer the opportunity for any student to participate. This is sometimes done through a student government course, in which students learn leadership and decisionmaking skills.

Some principals and superintendents have created student advisory groups with which they meet regularly. These groups offer the administrator an opportunity to explain policies and decisions to students, to hear directly from students about their concerns and to seek their insights. Some school boards devote a portion of their meetings to reports from students. Most administrators and board members report these arrangements are generally positive for students and board members, and are helpful in making policy decisions.

Yet none of these models really involves students in school or district policymaking. While students may be able to offer advice to principals, superintendents and board members, it is ultimately the adults who make the decisions about the issues that really matter.

Decisionmakers at the school, district and state levels might respond that children and teens do not have the maturity or breadth of experience to fully comprehend school budgets, staffing, instruction, facilities and legal matters that must be addressed by education leaders, and that involving young people would only slow things down.

It is true that involving students in the process may initially require extra time for both adults and students to become comfortable. But with proper training and some patience by adult policymakers, students are often able to contribute a great deal. In some cases the dynamic within a policymaking body may be changed for the better by the presence of

> **"For our nation's public schools to continue their vital role in our democracy, we need to develop our students' commitment to and understanding of that role.**
>
> **These young citizens will eventually elect our replacements on school boards, as well as make critical decisions regarding the funding and purposes of public schools." (Morales and Pickeral 2004)**

students, since members may feel obliged to be less confrontational, to articulate their arguments about the issues more clearly and to come to agreement through honest deliberation.

Larry Davis, executive director of the Washington State Board of Education, says students offer adult board members an immediate understanding of how a particular decision will affect students. According to Bill Keys, school board president for the Madison Metropolitan School District in Wisconsin, this takes much of the guesswork out of policymaking, especially for those board members who may not have much experience working directly with students.

- Increased energy and commitment to the organization
- Stronger sense of connectedness to the community.

Benefits to organizations and their governing bodies:
- Increased clarity and focus on organizational mission
- More connected and responsive to youth, resulting in better programming
- More inclusive and representative, leading to better programming
- More attractive to funders.

Adolescents often complain that adults do not take their concerns seriously. While this may be true in some cases, young people often make this assumption even when their preferred policy option is rejected for legitimate reasons. Giving student representatives a place at the table and a genuine role in decisionmaking – and developing a process to ensure they accurately represent the concerns of their constituents – may help convince skeptical students that their voices are being heard by policymakers even when they do not get exactly what they want.

Another group that benefits from student involvement is the community as a whole. Young people who participate in governance learn leadership skills, develop habits of civic participation and become fluent in policymaking. Through experiences such as these, they are poised to become the next leaders in their communities. And even students who do not serve in leadership positions may become less cynical about politics if their very first experiences with representative democracy are positive.

Finally, involving students in policymaking may be one way to both ensure the long-term success of educational systems and preserve the legacy of current members. Students who participate in governance while attending school under the policies they help create and support can provide an important perspective on the efficacy of those policies and can help ensure more effective policies in the future. In addition, these students may be more likely to run for the school board when they become eligible to do so. What they learn from education leaders and policymakers with whom they work now will inform their decisions as future policymakers.

There are other potential benefits of student involvement in governance to various stakeholders (Mantooth n.d. (a) and Zeldin, et. al 2000).

Benefits to student decisionmakers:
- Development of leadership and public-speaking skills, dependability and responsibility
- Better understanding of public policy and democratic processes
- Exposure to diverse people, ideas and situations
- Availability of more resources, support and role models
- Increased self-esteem, sense of personal control and identity.

Benefits to adult decisionmakers:
- More confidence working with and relating to youth
- Better understanding of the needs and concerns of youth, and increased sensitivity to programming issues within the organization

What do we mean by student involvement?

While little research exists on student involvement in school governance, there is significant literature on youth involvement in the governance of other types of organizations – typically those that serve youth. While community-based youth service providers are not subject to the same level of government oversight as public education, they can offer important lessons to schools, districts and states considering how best to involve students in decisionmaking.

Because they constantly struggle for funds to hire and retain staff, small youth service agencies often must rely on young people to help maintain the day-to-day operation of their programs. Because they see the development of leadership skills as an important component of youth development, these providers routinely create opportunities for youth leadership within the programs they offer and involve young people in programming decisions. In addition, foundations and other funders of youth programs have begun to require that

applicants demonstrate youth involvement in the development of funding proposals, and in overseeing and implementing the programs supported by whatever funding is awarded.

From youth involvement in operations, program design and fundraising, it is a short step to involving young people in planning and governance. The youth development field, as a result, has a history of involving students in decisionmaking that may be instructive. The quality of youth participation, however, varies. In some cases, young people are full partners with adults, offering ideas, discussing issues and working side by side with their adult colleagues. In others, youth act primarily as "window dressing" to make the organization more attractive to funders. Most models of youth engagement, however, fall somewhere between these two extremes. Figure 1 shows a typology representing one view of youth-adult partnerships in governance, with models deemed least inclusive and supportive of youth leadership at the bottom, and the best, most equitable models at the top.

While state law will determine the extent to which a district or state may involve students in actual policymaking, most of the differences in the levels of student involvement described in Figure 1 have to do with the comfort level of the adults involved. The quality of student participation depends, to a great extent, on the support given to the students by the adults, and the extent to which the students feel their contributions are valued by those adults. When young people are given opportunities to participate, they can surprise us with

their maturity, acuity and wisdom. Yet like any of us, they also need the support and affirmation of mentors and role models.

Figure 1: Ladder of Youth Participation

- **Youth-adult shared decisions:** Youth and adults offer and accept each other's ideas, and young people's input on decisions is as valued as that of the adults.
- **Adult-initiated, shared decisions with youth:** Projects or programs are initiated by adults but decisionmaking is shared with youth.
- **Consulted and informed:** Youth give advice, but decisions are made by adults. Youth are informed about how their input will be used and the outcomes of the decisions made by adults.
- **Assigned but informed:** Youth are assigned specific roles and informed about how and why they are being involved.
- **Tokenism:** Young people appear to have a voice, but in fact they have little choice about their roles and responsibilities.
- **Decoration:** Youth are given symbolic but ultimately meaningless roles to make the organizations look good.
- **Manipulation:** Adults use youth to support causes and pretend the causes are inspired by youth.

(Adapted from Hart 1992)

Student involvement in district governance

One arena in which students are rarely involved in a substantive way – and one that affects them most directly – is school and district governance. On the one hand, it is not surprising that students are not more involved in decisions about such mundane topics as budgets, insurance and facilities. For example, college student Shreya Mehta, a 2004 graduate of Irvington High School in Fremont, California, worked on several political campaigns, interned with a state assemblyman during high school and plans to major in political science in college. Yet Shreya describes the only school board meeting she ever attended as "pretty boring."

But not all students share Shreya's sentiments. Danielle Kimble, another member of the class of 2004 from Charlevoix, Michigan, attended many school board and township board meetings during high school. Danielle participated in a signature drive to keep Wal-Mart out of her small town and worked with fellow students to get the state Legislature to adopt a law restricting the number of passengers that may ride with a driver holding only a learner's permit. Danielle says, "Local government intrigues me . . . immensely! They make decisions constantly that affect my life.

Another reason school boards do not involve students more often in decisionmaking is that under state law they are usually ineligible for public office. Yet many districts have found ways to include youth voices. The policy of the board of the Teton County School District #1 in Jackson, Wyoming, for example, states that student board members "shall not have

an official vote in Board matters, but shall be entitled to an unofficial vote recorded in the minutes." The board of the Cumberland County School System, in Crossville, Tennessee, includes student members in the official roll call, invites students to participate in all discussions and gives student members an "honorary vote" that is not counted in the official tally.

Under Maryland state law, county boards of education may allow students to vote on some matters. In Baltimore County, for example, the student board member may vote on all matters except those relating to suspension or dismissal of teachers, principals and other professional personnel; collective bargaining; capital and operating budgets; school closings, re-openings and boundaries; and special education placement appeals.

A number of other states and territories explicitly provide for student membership in local school boards through state law (though none requires it), including Montana, Nebraska, New York, Puerto Rico, Utah and Virginia.

As described above, some districts seek student input through less direct means than seating students at the table with the school board such as student reports to the board and advisory groups to the superintendent. Some districts include students on curriculum committees, site-based management teams and even hiring committees. John Day, a veteran teacher at Greely High School in Cumberland, Maine, was a member of a hiring committee that included students. "I

remember sitting there, looking at a 9th grader, thinking that 'You have the same vote for staff that I have.' That's amazing."

Since most boards do not allow students to vote, many adult school board members believe the importance of students' participation lies in their contributions to board deliberations. Kim Goossens, a board member for the Garfield Re-2 School District in Rifle, Colorado, believes students' presence at her board's meetings helps keep conversations on track and more respectful. "We try to have the kind of meetings we're expected to be having, and should be having." Goossens and the other board members and staff interviewed for this paper agreed the most important consequence of student involvement is that it helps boards stay focused on the students they serve.

Student involvement in state policymaking

Though there are clearly many more opportunities for student involvement in decisionmaking at the school district and building level, a few states have established formal mechanisms for soliciting student voice on educational issues. A number of states provide for student representation on their respective state boards of education, and some have developed other strategies to secure student input on education and other areas in which young people have a stake.

Alaska, California, the District of Columbia, Hawaii, Iowa, Maryland, New Jersey, Tennessee and Washington all maintain student positions on their state boards of education. A typical example is Washington, where the state board has maintained nonvoting student positions for 27 years, according to executive director Larry Davis. There are two student positions on the board, and student board members are selected by the all-student board of directors of the Washington Association of Student Councils. Once selected, a student board member begins a two-year term in his or her junior year. The terms of the student board members are staggered, with the senior student serving as a mentor to the junior member. Davis is enthusiastic in his support for student involvement saying, "They're a constant reminder of why we're in this business."

The board of the District of Columbia Public Schools includes two student members, elected by the citywide Student Advisory Council and confirmed by the board. As members of any board committee, student members "have the right to vote, to make a quorum, and to participate as fully as any other member of the committee" (5 DC ADC s 116). Student votes during meetings of "the committee of the whole," however, are counted only for purposes of establishing a voting record and do not become part of the official vote.

Maryland's state board includes one student member, but in this case the governor selects one of two students nominated by the Maryland Association of Student Councils. The student board member is allowed to participate in executive sessions, but may not vote on dismissal or disciplinary action involving personnel, on budgets or on appeals under certain sections of the state education code.

Some states include students in state policymaking in other ways. Oregon's Youth Advisory Team, described above, is one example. A quick search of state codes provides three other examples of bodies that require student members, though there are probably many others: the California Child Nutrition Advisory Council, the New Hampshire Health Education Review Committee and the New Jersey Commission on Environmental Education. Not coincidentally, the work of these entities concerns education and children's issues.

Oregon State Superintendent's Youth Advisory Team
Oregon's State Board of Education does not have a student member. Yet Oregon offers a wonderful example of the seriousness with which students are willing to approach important governance issues when given the opportunity, and the high-quality work they are capable of producing. State Superintendent of Public Instruction Susan Castillo has established a Youth Advisory Team (YAT), with which she and her staff meet four times per school year. The YAT is made up of 20-25 students, 8th grade through college freshmen.

Prior to YAT meetings, members are sent relevant information and readings on the issues to be considered. At the meetings, YAT members hear from expert guests and are asked to make recommendations. In the past two years, the YAT has addressed issues such as high school reform and Oregon's Certificate of Advanced Mastery, changes in graduation requirements to better prepare students for college and work, and school safety. YAT has made recommendations on all these topics to the Oregon Department of Education (ODE), and the department publishes reports on the YAT meetings and recommendations, as well as the steps the department is taking to follow up on YAT recommendations.

In February 2004, for example, YAT considered the issue of school and district consolidation. The group heard from the administrator for the Oregon House Education Committee, the administrator for the State Board of Education and other ODE staff. Students learned about district mergers in Oregon and Arkansas, and about the effects on school districts of a property tax bill passed in the early 1990s and Oregon's 21st-Century Schools Act. The YAT recommended the development of a set of questions to be considered in making a consolidation decision (such as whether current course offerings are limited by the district's size, and the distance students would have to travel in a consolidated district). The students also suggested that students' current academic achievement be considered. According to the YAT report on this meeting, the state superintendent asked that the Legislature, the governor's office and the State Board of Higher Education consider the YAT recommendations, and the Senate Education Committee did indeed consider the issue and the YAT recommendations.

For more information on YAT, see www.ode.state.or.us/superintendent/yat.

In a few states, student board members are allowed to vote on certain matters. In most, however, students' status as minors means that boards and other policymaking bodies have had to find other ways to elicit student voices on important policy issues and decisions. A few have settled on some form of unofficial vote, while for others students' most important contribution comes during board deliberations. In some cases, board policy limits students' ability to influence the board's deliberations. For example, board policy for the Gibbon-Fairfax-Winthrop Schools, in Minnesota, states that student board members do "not have the right to vote or make or second a motion." Other districts seek to actively encourage student participation. The board bylaws of the Davenport Community Schools, in Iowa, give student members "the privilege of submitting items for discussion on the board agenda except those items relating to personnel."

One issue boards need to consider, then, is their real purpose for involving students in governance, and whether their policies actually accomplish that purpose. An approach in which students come to meetings but are not allowed to initiate discussion on the issues that are important to them (or those they represent) falls near the bottom of the Ladder of Youth Participation in Figure 1. Such an approach is not likely to engage students fully. If a board genuinely seeks to design policy that is responsive to students' needs, it must create a process that encourages student input.

Another issue to consider is that of board diversity and representativeness. The students who are appointed or elected to school boards are likely to be the most motivated, high-achieving members of the student body. In a few places, attempts have been made to reach beyond the typical student leaders and involve a more diverse set of students in decisionmaking. Tennessee state law, for example, requires that if a school board includes student members, it must include four students, two of whom are enrolled in the college track and two in the technology track. The Davenport school board includes a student member from each of the district's three high schools and a special education student position, which rotates among the high schools.

One related finding, though anecdotal, is that for many of the state and district boards examined here student representatives are the only nonwhite members. Because the population of U.S. schools is becoming increasingly diverse, it is important that boards reflect this diversity. Students of any background must believe that leadership opportunities are open to them both now and when they are adults. Thus processes for student involvement that are fair and equitable can serve as strategies for making boards and other governing bodies more representative, and for cultivating leaders from minority communities.

Like any other innovation, student involvement in governance is more likely to be sustained if there is a policy in place to support it. But the specifics of the policy are critical. The policy of the Garfield Re-2 School District, for example, describes the rationale and goals for student participation in the district's board of education, the duties of the student representative, length of terms and voting restrictions, and the Student Ambassador program. But the policy does not spell out how the district will support the student representative. As a result, Kim Goossens, the board member responsible for getting the policy adopted, spends a significant amount of her own time providing support for student board members and the Student Ambassador Program. Goossens enjoys working with the students, but when she was ill recently, she says the program "stumbled." She has asked other board members for help, but worries the program is not sustainable.

Selection or Election of Student Representatives?

Policies designed to include representatives from certain student subgroups (e.g., special education, vocational track) do not necessarily mean student decisionmakers truly represent their constituents' interests. In some cases students are elected, and so are, theoretically, answerable to the students they represent. In Madison, Wisconsin, for example, the student representative to the board is one component of a two-part system designed to represent students' interests to the board. Any Madison high school student may run for a regular or alternate position on the board. A candidate forum is held for all students, and the candidates tour all the district's high schools, giving speeches and answering students' questions prior to a districtwide election.

The second part of Madison's system is the Madison Student Senate (MSS), which operates as a medium for communication between students and the school board. Members of the MSS include eight representatives from each high school, the student board member and alternate, and the losing candidates from the final election for the board. MSS members report to their respective student councils and fellow students. The alternate student board member is the MSS chair. Student groups may present information or concerns to the MSS, and the student board member may share these concerns with the school board as appropriate.

The student representative to the Madison school board receives one pass/fail credit for participation, with the school board determining whether to pass or fail the student. The student representative to the board may be impeached by a two-thirds vote of both the MSS and the school board.

In other cases, student representatives are not directly elected, but students are involved in the selection process. In Maryland, for example, student applicants for the state board of education are interviewed by officers of the Maryland Association of Student Councils (MASC), the current student member of the board and an adviser. Five candidates are selected to address about 800 students at the MASC Legislative Session and answer questions. Students attending the session cast ballots and select two finalists, and the governor selects one of the finalists to serve on the board.

By contrast, staff for the Washington State Board of Education provide support to student board members, briefing them prior to meetings and answering questions afterward if necessary. Larry Davis, executive director of the board, schedules a home visit each year with the new student member and his or her parents, and encourages student members to ask questions whenever they need help. In addition, the board's strategy of having an older, second-year student member mentor the first-year student member reduces the burden on staff and adult board members while also providing an opportunity for the elder student to be an "expert." The result, says Davis, is that while first-year student members do not contribute a great deal to board deliberations, by the second year they are very involved and contribute a great deal.

The student board member policy of the Teton County School District in Wyoming spells out a similar mentoring system. Student board members also are required to meet with the superintendent on a regular basis to discuss school board agenda items and matters to be discussed with the Student Impact Committee, which is comprised of students from the district's middle and high schools. Finally, new student board members must participate in board orientation and training throughout their first month on the board. By including these provisions in district policy, the board ensures student members will continue to be supported without placing a burden on a single board member.

Questions for policymakers

Before deciding to involve students in governance, boards and other governing bodies must assess their priorities and clarify their mission. For a variety of reasons, schools are focused more than ever before on improving the academic achievement of all students, especially in the areas of literacy, math and science. For many districts and states, the pressure to demonstrate constant improvement in these areas is intense. As such, many boards may find it difficult to justify what they perceive as the added responsibility of cultivating young leaders.

Most policymakers and education leaders would probably agree that one of the essential functions of public education in the United States is the preparation of citizens who understand and exercise their rights and responsibilities, and who are capable of participating in their own governance. Involving students in educational governance can be an effective way to serve this function. But policymakers must determine whether they have the commitment and capacity to involve students in a meaningful and productive way. A poorly designed program that does not effectively engage student representatives, or causes them to feel their contributions are not taken seriously (such as the approaches described at the lower end of the Ladder of Youth Participation in Figure 1), may actually increase student cynicism.

For those education leaders seeking to contribute to the civic mission of education by providing opportunities for students to participate in decisions about their own education, the following questions should be considered.

1. Does the state or district mission include the preparation of democratic citizens? Do policymakers believe it is their role to support this mission?
2. Are policymakers willing to adjust their culture and procedures to make youth feel welcome and supported? Are they willing to discuss student input on the merits, even when it conflicts with their own views?
3. What are the legal restrictions on student involvement in policymaking? If students may not vote, are there other ways policymakers can include student voices in decisionmaking?
4. Is creating student positions on the board of education the best approach? Would another model involving more students, such as an advisory group, provide students as valuable an experience in genuine decisionmaking?
5. What kind of training will student decisionmakers need to serve effectively? What kind of training will adult decisionmakers need to support student decisionmakers and get the most out of student involvement?
6. Will meetings be scheduled at times and locations that will allow student representatives to participate?
7. Does the policy provide students with the support they need to be successful (such as training, staff support, mentor(s) and formal and informal opportunities to ask questions and communicate with their adult colleagues)?
8. Does the policy ensure student representatives accurately reflect the interests and concerns of the student body, and effectively communicate policymakers' decisions to the student body?

Conclusion

All board members and staff interviewed for this paper were positive about their experiences involving students in decisionmaking. When asked specifically whether student involvement changed the dynamics of board meetings and deliberation, these education leaders responded that students' presence, in fact, improved board meetings by giving members a clearer understanding of the effects of their policy decisions on students, by helping focus the conversation and by reminding board members to behave in a respectful way.

Including students in governance provides opportunities to learn many of the essential skills of citizenship such as researching an issue, asking probing questions, developing and defending a position, negotiating, discussing and debating. Through participation in educational governance, students learn that public policy is made by the public, and that as citizens – even after they leave school – they have the skills, the knowledge and the right to participate in developing the policies that govern their lives.

Because of their history of involving youth in leadership and decisionmaking, professionals in the youth development field can serve as important partners for educators and policymakers in designing and supporting student leadership opportunities. Strong partnerships between education policymakers, teachers and community-based youth service providers can ensure programs designed to involve students in educational governance are well designed, are linked to classroom-based civics instruction, and students receive ongoing support and opportunities for reflection on the leadership lessons they learn.

While further study is needed to fully understand the effects on policy of different levels of student participation in policy-making, existing research on youth participation in the governance of youth-serving agencies indicates that greater involvement is better for youth, for the governing body and for the organization. Those already engaging students in decisionmaking appear to support this finding. Thus, if one of the goals of public education in a democracy is to prepare citizens to participate in their own governance, it seems logical that classroom-based civic education should be augmented with opportunities for young citizens to develop the competencies and practice the skills needed for effective participation.

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Organizations
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Youth on Board, www.youthonboard.org.

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THE POWER OF AN UNTAPPED RESOURCE

Exploring Youth Representation on Your Board or Committee

ASSOCIATION OF ALASKA SCHOOL BOARDS
Advocates for Alaska's Youth

ALASKA
ICE
Initiative for Community Engagement

Health &
Social Services

THE POWER OF AN UNTAPPED RESOURCE
Exploring Youth Representation on your Board or Committee

This booklet was created by an Alaskan student for any board that is interested in expanding the representation of their board, "growing their own" board members for tomorrow and/or empowering the youth in their community. From Native corporation boards, youth serving organizations and faith groups, state and local advisory councils, to the state school boards association, Alaskans are witnessing a trend – Alaskans are committed to working with youth.

A greater number of Alaskan youth want to participate in the governance of their communities, despite traditional board membership being viewed by many youth as baffling, boring and/or burdensome. An increasing number of previously adult-only boards are soliciting youth involvement.

These Alaskan boards benefit from youth membership by youths' creative thinking, different point of view, and direct questioning. If done correctly, youth gain leadership skills and valuable life experience. In order to be successful, young people cannot simply be "plopped" onto a board and expected to perform. They, like any new adult member, require training and mentoring in boardsmanship. It cannot be assumed that every new member understands how boards operate, the rules of the meetings, the culture of the board, how Robert's Rules of Order work, public relations, politics of decision making and so on.

A young person who serves on a board, should be properly trained and mentored. We all benefit by having young people exposed to the "way things are done" in a democratic society. Isn't it time for your board to "tap the power of youth?"

Youth who participate in governance roles with adults gain new skills, develop responsibility, learn citizenship, and acquire the Developmental Assets™ needed to succeed as adults.

This booklet lists some basic criteria for creating an effective intergenerational board. The ideas and experiences contained in this booklet have been collected from youth who serve on intergenerational boards, throughout Alaska.

Published: First printing 2001, revised printing Sept. 2005

Why Have Youth on Your Board?

- Adults who work with youth on boards gain insights about youth, broaden their own perspectives and have a more positive perception of youth.

- Boards that have incorporated youth membership are improved by youthful energy, perspectives and insights— programs and services are improved as a result.

- Adult board members can be revitalized and thus will increase their commitment to the organization and gain a stronger sense of community connectedness when serving with youth board members.

Preparing Your Board for Youth Involvement:

Assessing your readiness

Boards tend to work effectively with youth if, prior to including youth members, they are willing to:

- Be flexible with meeting times and locations in order to accommodate school schedules.

- Adjust their culture from doing things to and for youth to working with youth.

- Give up some time–related efficiency while new members are becoming comfortable with the culture of the board and the use of Robert's Rules of Order.

- Make some adjustments to the way the board supports its members. (i.e. paying young people in advance for their expenses, providing snacks at meetings and/or explaining the young person's role to parents.)

- Advise your board in advance of who your new members are and when they will begin attending meetings.

- Hold meetings at times that are convenient for your new members. Take into consideration factors such as school. Sometimes these times are not convenient for other board members, so try and reach a compromise.

Preparing Your Board for Youth Members:

Once your board has decided it is willing to make adjustments and accommodations for youth representatives, some of the following actions would be appropriate for your board to take.

- Provide some research basis for why involving youth is important (e.g. helping kids succeed, learning leadership and life skills, improve decision making, improve school climate, increase youth engagement).

- Propose the idea of having younger members on your board. Remember change is often feared so be persistent and let the other members get comfortable with the idea.

- Have a vision for what the board could achieve by youth representation and share it with your board members.
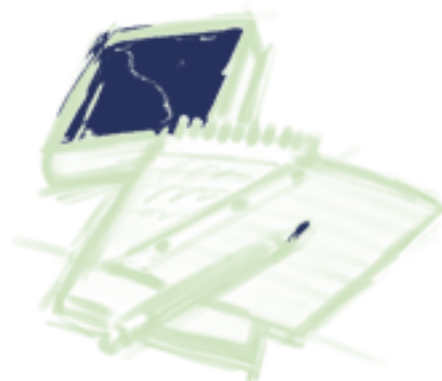
- Give positive examples of youth action/activities in your community.

- Set meetings at times that would be convenient for youth to attend.

- Personally invite youth to come attend the meeting as a guest.

- Stay positive and resolute. Boards are often comprised of the busiest men and women in a community. Understand that any change in the culture of the board will cause shifts that will be uncomfortable for everyone involved. The youth will be more readily welcomed if less drastic changes occur.

- Reduce the use of acronyms or provide all members with a card of commonly used terms and acronyms.

- Reach out to other boards that have youth members to learn from their experiences.

CREATING YOUTH POSITIONS:

Once your board has agreed to have youth representation, a few logistics are necessary. Of course each board culture will determine the extent of the youth's role and involvement. Here are some things to consider:

- If your board is a publicly elected board, for legal reasons you will need to limit your youth representation to an advisory capacity. If this is the case, insure that youth input is obtained and listened to (i.e. provide a mechanism for youth advisory votes, before the other members vote.)

- If your board is not governed by state or federal statute and is in control of its own by-laws, you can most likely invite a youth to have many of the same "member privileges" as the adults on the board.

- When creating youth positions you may need to adjust your by-laws or board structure to accommodate the newly created position.

- Consider having a minimum of two youth board members. This will avoid tokenism, increase diversity of opinion and make it more comfortable for youth to participate.

When deciding how the youth member(s) will be chosen, it is a good idea to consider the following questions:

- Is it legally allowable to have youth members chosen in the same way as adult members? (If this is possible it is probably best to have consis- tency in the way all members are selected.)

- Will the youth be representing a constituency on your board? If so, should that group select your new member?

- If you are a voting board, is it necessary to select two youth members in order to have an odd number of members on your board for voting?

CONSIDERING LEGAL ISSUES:

Looking at the issues and topics that your board deals with will help you determine many things, including the extent of youth involvement and where you should look for new members.

- If your board deals with liability issues, confidentiality, conflict of interest hearings, employee contracts and/or student discipline issues, it is a good idea for your board to have a conversation with a lawyer to determine the appropriate level of youth involvement in these sensitive matters. In many cases, the youth representative is excused from attending these portions of the meetings or hearings.

RECRUITING AND CHOOSING YOUTH REPRESENTATIVES/MEMBERS:

It is one thing to create the opportunity for youth representation on your board, it is quite another to find youth with the talent, time, and inclination to join your board. It is best to do a broad-based search and identify several candidates who could best serve your board. Following an interview process, you can select the appropriate candidate.

- Make a list of youth whom you personally know through church, school and/or neighborhood. Invite each member of your board to do this as well.

- Consider asking the heads of youth-serving organizations to compile a list of recommended youth. (Examples are: recreation centers, cultural centers, faith communities, sports leagues and youth courts.) Ask the school counselors, administrators, teachers, club sponsors, coaches and PTAs for their list of recommendations as well.

- Create an application and ask questions that pertain to the issues of your board. Be careful not to make the application a barrier to recruitment. Understand that this will probably be the first application of this kind completed by the youth.

- Designate a contact person within your organization. This will help your board evaluate applicants and will allow consistency when dealing with the youth applicants.

- Make sure the process is open enough to attract a diverse group of qualified candidates. An easy way to ensure this is working with multiple schools from different areas of your community.

- Sell the benefits of involvement: a learning opportunity, a way to contribute to the community, "real world" experience and most importantly an opportunity to have a voice for their age group.

SELECTING QUALIFIED APPLICANTS:

If you want to select the best candidates, allow your process to bring out the best in your applicants, rather than "weed them out." This will take some intentional effort, but you will be rewarded with a deeper understanding of each candidate.

- Conduct interviews with applicants. Make these interviews at youth friendly times and locations.

- Ask for references. A conversation with a parent, teacher or religious leader can help you evaluate the traits and qualifications of each candidate.

- Search for evidence of the positive contributions each applicant would make. Look for diversity, a desire to advocate and a confident voice.

Determining Responsibilities:

You may wonder why this category follows the section on selecting a qualified applicant, rather than precedes it. It is because too many times boards go searching for "that perfect match" rather than finding an "engaging youth" and working to accommodate him/her to the culture of the board. After selecting the youth, have a discussion with your board about the responsibilities of your new member. Consider this a continually evolving list because as your youth gains confidence and competence, the board will need to consider some adjustments.

Some possibilities for youth member responsibilities include:

- Place a member report at the beginning of each meeting. This will allow your youth members to share their involvement in board projects and report back from any other groups or subcommittees they may be a part of.
- Nominate youth to serve as co-chairs of your board and/or as members of your smaller subcommittees.
- Assign youth to meaningful, but needed tasks such as minute-taking and/or contacting other organizations for the board.
- Speak at events on behalf of the organization, be present and speak up when funding organizations come for on site meetings and reviews.

Educating the Youth Member:

- Familiarize new board members with your services and issues by giving them your web site and putting them on your list serve, or mailing lists.
- Prepare brief talking points for board members about your services so they can advocate for the organization.
- Take a tour of the organization's facilities with an elected official or other board member.
- Provide all new board members with the history of the board, previous issues, past actions taken and other useful information. The more your new members know the more they will be effective and thoughtful members of your board.
- When you give your new member the information they need, include a copy of the minutes from their previous meeting. This will acquaint them with the flow of your meetings and the intricacies of Robert's Rules of Order, if you use them.
- Provide your new members with a copy of the agenda and any needed materials before your meeting so they can review the information and become prepared.
- Be patient. The new member's learning curve is probably vertical.
- Make certain your new members know members of the board on a personal level. This simple action will make youth members feel much more comfortable and connected to your board.

- Have an open dialog about appropriate meeting dress. Will the new members dress up, or will the board choose to move in a more casual direction?

- Identify a board member who would be willing to act as a mentor. Ideally this would be a person in a position of leadership, (to add credibility), and be in a position to advocate on the behalf of youth members.

- Certainly it would be nice for a "mentor" to meet with youth/new members before the first meeting, to go over issues such as appropriate dress, issues on the board agenda, etc.

COMPLETING THE DETAILS:

- Provide transportation to and from your meetings for your new members if they need it. A car ride or bus, cab and airfare should be provided if needed.

- Call the parent/guardian of your new member to compliment them on their son/daughters perceptions. Answer any questions they may have. This is an excellent time to build the important link to the home. Provide the parents with all the necessary information including name and phone numbers of your organization. Make sure that when you hang up the phone everyone involved feels supported and validated.

- A representative from your board should contact the school and workplace to inform them of the student's selection and any absence that will occur as a result. These telephone calls are an excellent opportunity to ask people to congratulate the students for their selection.

ORGANIZATIONAL ADULT CHECKLIST:

(Adapted from 14 Points by Youth on Board). Adults can use this checklist to assess your board's ability to have meaningful youth representation. This tool could help everyone involved comprehend the necessary adjustments and to measure their commitment. It is important to note that we are not implying that every board meet all of these criteria.

Key
1. Yes = We do this already – no need for further action.
2. To Consider = We think we need to consider this or have further questions.

1. 2.

☐ ☐ Does the board have the time and resources to make a commitment to effective youth representation?

☐ ☐ Has the board amended the by-laws or created policies stating that young people will be a permanent part of governing your organization?

☐ ☐ Is the board clear about why it is involving young people in governance?

☐ ☐ Is the board willing to adjust its culture to make meetings youth-friendly?

☐ ☐ Has the board outlined recruitment criteria for new members? (e.g. motivation, diversity, competence, quality of past experiences, etc.)

☐ ☐ Is there a mentor or coaching system in place?

☐ ☐ Does the board have a system in place for youth members to train new youth members?

☐ ☐ Are young people included in all issues, not just those affecting their age group?

☐ ☐ Does the board's culture promote open discussion?

☐ ☐ Is there time for all members (including youth) to speak at meetings?

☐ ☐ Are young people's terms of office equal to those of adults?

☐ ☐ Do young people have equal voting status and/or does your youth representative substantially influence governance of the organization?

☐ ☐ Do young people have access to the resources needed to participate in your board's work? (e.g., long distance phone cards, faxes, computers, and copy machines)

☐ ☐ Is there informal time to network and build relationships with other members?

☐ ☐ Are young people encouraged to keep in touch with their peers about their governance role?

☐ ☐ Is there a place where young people can voice their concerns outside the meeting environment?

☐ ☐ Do adults ask the youth representative(s) how they can better work together and take these recommendations seriously?

☐ ☐ If youth are confused about an issue, how does the board respond and guide them to the information they need?

☐ ☐ Is equal weight given to youth member opinions?

☐ ☐ Do board members take the initiative to get to know all the members (including youth) of your board on a personal level?

☐ ☐ Does the board provide training for young people on speaking up in adult groups?

☐ ☐ Do you offer training for young people and adults in general governance skills?

☐ ☐ Are youth members briefed ahead of time on how to read a financial statement?

Organizational YOUTH Checklist:

Youth can use this checklist to assess your ability to provide meaningful youth representation. This tool could help everyone involved comprehend the necessary adjustments and to measure their commitment. It is important to note that we are not implying that every board meet all of these criteria.

Key
1. Yes
2. To Consider

1. 2.

☐ ☐ Do I have motivation, ability and knowledge to put in the time to understand the issues of the board?

☐ ☐ Am I aware of my job description and what the board expects of me?

☐ ☐ Has the board communicated the specific objectives they have for me as a youth member?

☐ ☐ Have I either identified or been assigned a mentor for my board role?

☐ ☐ Do I have the motivation, ability and knowledge needed to make a contribution to the board?

☐ ☐ Do I work to know individual board members on a social level?

☐ ☐ Am I aware of the written and unwritten agenda and flow of the board meetings?

☐ ☐ Do I demonstrate my willingness to learn through my words and actions?

☐ ☐ Am I aware of the needs, public positions and opinions of the youth I represent?

☐ ☐ Do I have the motivation, ability and knowledge to correspond with my community and the group(s) I represent about my governance activities?

☐ ☐ Do I have the motivation, ability and knowledge to take leadership roles on committees and/or the board when possible?

☐ ☐ Am I willing to ask questions that give me insight and understanding of the board's activities?

☐ ☐ When receiving feedback, information and answers to questions, I recognize the expertise and experience of the adults on my board?

☐ ☐ Am I willing to give my time and attention to all board issues rather than just the ones that affect me and those I represent?

☐ ☐ Do the adult members of the board hold any stereotypes about young people?

☐ ☐ Do I hold any stereotypes about adult board members?

☐ ☐ Have the adult board members received training that allows them to consider their assumptions about "kids these days?"

☐ ☐ Does the board show its appreciation for the good work that you are doing and have done?

☐ ☐ Am I mentoring other potential student representatives who may replace me?

LADDER OF YOUTH REPRESENTATION ON BOARDS: [1]

8. Youth-Adult, shared decisions

7. Youth-initiated ideas, shared decisions with adults

6. Adult-initiated, shared ideas with youth

5. Consulted and informed

4. Assigned but informed

3. Tokenism

2. Decoration

1. Manipulation
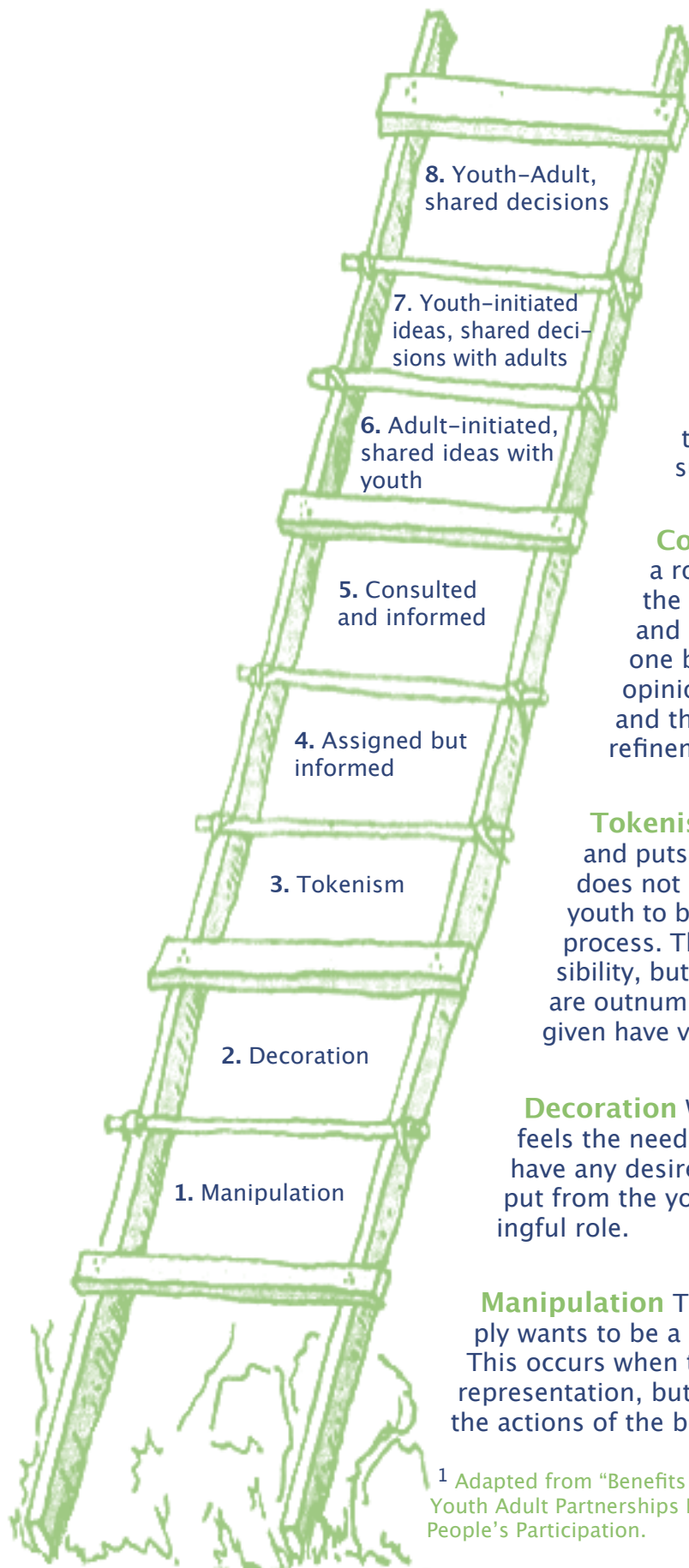
Youth/Adult Shared Decisions
This is the goal. The board is comfortable with the competence and ideas of the youth representative and grants them full voting rights. The entire board works together, equally implementing youth or adult ideas.

Youth-Initiated Ideas This board is progressing and allowing the youth to get an idea and then act upon it. The board sees it as the "youth thing" which is different from the "adult thing." And, although the adults provide assistance, guidance, and support – it remains the "kid's thing."

Consulted and/or Assigned The youth has a role on the board and is kept informed on all the issues. But the youth is treated as a "kid" and not a member. In the consulted role, at least one board member asks the youth for his/her opinion. Basically on this rung, adults propose and the youth provide reactions, revisions, and refinements.

Tokenism The board wants youth representation and puts the youth in the spotlight a great deal, but does not have the time, skills, or culture to allow the youth to be an active participant in the decision making process. This is when youth are given a role or responsibility, but they have little power, either because they are outnumbered, or because, the roles they have been given have very little influence.

Decoration While more than a gimmick – your board feels the need to have youth representation, but does not have any desire to get anything more than insignificant input from the youth. Youth are not allowed to have a meaningful role.

Manipulation The most base level – where your board simply wants to be a part of the youth representation movement. This occurs when the board's image benefits by having youth representation, but the youth is only there to "rubber stamp" the actions of the board.

[1] Adapted from "Benefits of Youth Partnerships" by the Seven Circles Coalition Youth Adult Partnerships Project in Sitka, Alaska, from Hart's Ladder of Young People's Participation.

FOR YOUTH BOARD MEMBERS:

The essence of local decision making is based upon civility, personal relationships and respect. Once the adults on the board reach out to the youth, it is up to us (the youth) to reach back – and really stretch in order to make the connection. Here are a few things for us to consider when being selected to be on a board:

1. **Have confidence in yourself.** By whatever means, you have been selected, appointed or voted onto the board, you belong there. Sure, it will take you a few months to get comfortable in your position, just listen, watch, ask questions and learn.

2. **Find a guide**. There is an old saying that you can't be a guide unless you are on the journey, so find a guide, coach, or mentor with whom you feel comfortable, someone who has experience with the board and who is willing to learn alongside you.

3. **Be a leader.** You are now in a leadership role – use this role to advance the fact that youth are capable, intelligent and mature. People are watching you and you are now seen as an example of all youth. This does not mean that you have to be all nervous and change your whole personality. It does mean that you will be held to a higher standard than some of the youth who are not at the table.

4. **Stay interested and curious.** Sometimes the issues that a board faces are not that interesting – to anyone. However, the work of a board is to do all the work it is responsible for and it is up to you to take responsibility for your learning and contribution. If you look bored, the adults will have a difficult time taking you seriously.

5. **Show up.** If you want the board to invest in you, take the time to invest in the organization and board with your time. Attend all meetings, confirm the dates, times and locations. Mark them in your calendar.

6. **Use the power you have.** Speak up, if you feel like you have some ideas about how to improve the flow of the meeting, the dialogue between members and the agenda topics. Use your politeness skills to not offend members and they will listen. It is also important to know that you are one of many people, don't expect the board to do everything you say. To be treated like an equal means that your ideas are considered to be as valuable as all the others, not more so.

7. **Do something.** Of course you are busy. School, extracurricular activities, work, family obligations, other service commitments – your schedule is packed. However, if you want to be a leader, you will have to take on some projects and deliver what you promise through action. Get on a working subcommittee, take on a project, do some in-depth investigation of an issue or two for the board. The bottom line is that you get respect by making contributions through action.

8. **If you have a question, it is likely that someone else has a similar one.** Becoming a decision maker is complex. Learning leaders ask questions. Asking questions gets it out of the negative and sets a positive tone. So, feel free to ask questions. In case you have so many questions that you would actually slow the meetings down to a crawl, jot your questions on a note pad and get your answers during the breaks. The board members will expect you to learn the lingo –so make certain that you are learning as you go. Study their language, use their language and soon it will become second nature for you as well.

Resources:

Youth/Adult Partnerships
Provides information and consultation on getting youth and adults to work together in meaningful ways in Southeast Alaska.
Seven Circles Coalition, SEARHC
Sitka, AK 99835
(907) 966-8753

National Center for Nonprofit Boards
Dedicated to increasing the effectiveness of nonprofit organizations by strengthening their boards of directors.
1828 L Street, NW, Suite 900
Washington, DC 20036-5104
(800) 883-6262
http://www.ncnb.org

The Innovation Center for Community and Youth Development
Provides resources and training to organizations and communities to increase youth-adult partnerships in creating a just and equitable society.
6930 Carroll Avenue
Suite 502
Takoma Park, MD 20912
(301) 270-1700
http://www.theinnovationcenter.org

Community Partnerships With Youth, Inc
Offers a training curriculum and provides training to young people about their role as trustee, or as partners in the governance process.
6744 Falcon Ridge Court
Indianapolis, IN 46804
(317) 875-5756
http://www.cpyinc.org

Youth on Board
Provides consultation, and publications to involve young people in decision making.
58 Day Street PO Box 440322
Somerville, MA 02144
(617) 623-9900 x 1242
http://www.youthonboard.org

Resiliency, Youth Development Program
Division of Behavioral Health
3601 C Street, Suite 934
Anchorage, Alaska 99524
(907) 269-3425
http://www.hss.state.ak.us/dbh/prevention/programs/resiliency/default.htm

A printable version of this publication may be downloaded from the Association of Alaska School Boards web site at http://www.aasb.org/publications/untapped_resource.pdf.

About the Author

Hans Bernard was the longest serving youth representative to a school board in America. His three consecutive one-year terms on the Anchorage School Board is unprecedented. Hans has presented at three National School Boards Association conferences and spoken to several Association of Alaska School Boards statewide audiences. Hans was a full voting member and subcommittee chair of Alaska's state Adolescent Health Advisory Committee for three years. Hans graduated from Chugiak High School, Eagle River in 2001 and from Willamette University Salem, Oregon in 2005, with a degree in Political Science. From 2003–2005, Hans served as a legislative aide to the majority leader of the Oregon State Senate.

Photo attribution: National Wildlife Foundation, Alaska Youth Environmental Action Advisory Board develops their strategic plan.

ASSOCIATION OF ALASKA SCHOOL BOARDS
Advocates for Alaska's Youth

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Division of Behavioral Health
3601 C Street, Suite 934
Anchorage, Alaska 99524
Phone: (907) 269-3425
Fax: (907) 269-3786
Website: http://www.hss.state.ak.us/dph/

Alaska Initiative for Community Engagement
1111 West 9th Street
Juneau, Alaska 99801
Phone: (907) 586-1486
Fax: (907) 586-1450
Website: http://www.alaskaice.org

Contact AASB with any questions or comments.

Typical Engagement? Students on School Boards across the United States

> SoundOut is an expert assistance program focused on promoting Student Voice and Meaningful Student Involvement throughout education.
>
> We work with K-12 schools, districts, state and provincial education agencies, and nonprofit education organizations across the United States and Canada.

<*Back to Articles*

Typical Engagement? Students on School Boards in the United States

By *Adam Fletcher*. *Originally published in* Connect 181*, February 2011.*

A recent study reported that as much as 92% of any individual school building population in the U.S. is comprised of students, with adults accounting for only 8% of the total humans in any given school. Much the same as Australia, there is a growing concern for the vastly underutilized majority here as we struggle with how to make schools more effective for all students. As part of my work through SoundOut, I provide technical assistance and training to districts that are interested in systematically engaging students in education policy-making. I have researched more than 40 years of involving students as school board members, and follow national trends carefully. This article is a report and analysis focused on the growing interest in the practice of engaging students through boards of education, both at the state and local levels, across the U.S.

There are several types of practices that involve students with school boards. The lowest bar is simply and routinely asking students what they think about school board policy-making issues. This can be a formal process mandated through policy, conducted through online surveys or in-person student forums. Another practice is to require regular student attendance at school board meetings. Both of these are generally seen as non-meaningful forms of involvement, as they do not require students have an active role in the process of decision-making beyond that of "informant".

Higher up the ladder is the practice of having student advisory boards that inform regular school board decision-making. This is the case in Boston, Massachusetts, where the Boston Student Advisory Council is

a citywide body of student leaders representing their respective high schools. BSAC, which is coordinated by the administered by the district office in partnership with a nonprofit called Youth on Board, offers student perspectives on high school renewal efforts and inform their respective schools about relevant citywide school issues. In addition to personal skill development and knowledge building activities for their 20-plus members, BSAC students have strongly influenced district policy-making about cell phone usage, truancy, and reducing the drop out rate. They also have regular dialogues with the district superintendent and school board members.

The Denver, Colorado, Student Board of Education is a group of 30 students who represent the15 high schools in the city. They are charged to serve as leaders in their schools and represent all students at the district level. Students create projects that affect their local schools and report back on them to the district. They have also created a curriculum that is used in several high school leadership classes. However, these students have to ask permission to speak to their regular board, and that does not happen frequently. According to a recent local newspaper article, the district has trepidations about giving students a regular voice in school policy-making. A school district attorney was quoted saying, "The law does not provide for a means by which to create a student position on the board, whether it's a voting position or not."

One of the main issues in student involvement in boards of education is whether students are legally allowed to sit on boards, and if they are allowed, whether they have a full vote akin to their adult peers. A 2002 study posted on the SoundOut website identifies laws regarding student involvement on state and local school boards in 39 states out of 50 states across the U.S. The results vary: As many as 16 states have laws allowing students to sit on school boards at the state level, with no vote. 20 states allow the same at the district level. Six states disallow either entirely, while seven allow full student voting on the state and district levels.

Despite being allowed otherwise in those seven states, only California and Maryland actually have full-voting members on their state boards of education. Both of those states have highly influential student organizations that openly lobby for student voice. The California Association of Student Councils, founded in 1947, proudly proclaims that all their programs are student-led. One of their most powerful activities is the Student Advisory Board on Legislation in Education, or SABLE. Each February SABLE convenes in the state capital to set education priorities and share them with key decision-makers. They have a direct audience with the Senate Education Committee, and their iinfluence helped form a position for a full-

voting student member of the California State Board of Education, whose position was created in 1969. They gained full voting rights in 1983, including closed sessions. The Maryland Association of Student Councils has similar impact in their state, with a student member serving in a regularly elected position annually.

As I have written about in *Connect* before, I have more than a decade working with hundreds of schools across the U.S. and Canada to promote meaningful student involvement. Among the things I have found is an inherent dilemma in the type of special positioning students on school boards receive. The dilemma is that while an extremely limited number of students gets an opportunity to share their voices with adult decision-makers in the system, this type of "convenient student voice" is generally conducted at the adults' convenience and with their approval. In a growing number of states, the status quo of being excluded does not suit students themselves anymore. Currently, a disjointed but growing movement is seeking to increase the authority of students in school policy-making and decisions. In Hawaii, there has been a non-voting student representative on the state board of education for more than 20 years. However, a recent proposal would eliminate the position. A new Facebook page seeks to maintain that role. In my home state of Washington, a group of independent students are working with the state's Legislative Youth Advisory Council to lower the voting age for school board elections to 14, which, while not necessarily installing students on school boards, would give them a concrete say in education policy-making. In Maryland, where students already have a role on the state board of education and in many district boards, in counties across the state there are active campaigns to increase the effect of student voice, with students calling for a full and regular vote in education policy-making. There is even an instance in Maryland where an 18-year-old named Edward Burroughs was elected to his local school board through regular office after running an effective campaign.

These examples allude to the process of what I refer to as *engagement typification*, where the roles of students are repositioned throughout the education system to allow Meaningful Student Involvement to become the standard treatment for all students, rather than something that is exceptional. Consistently positioning students as in special positions doesn't allow adults, including educators, administrators, or parents, to integrate students throughout the regular operations of the educational system. While seeing their peers as school board members is enticing to a number of students, most are disallowed them from seeing *themselves* as regular and full members of the *leadership* and *ownership* of education, or as trustees for their own well-being. That is what differentiates Meaningful Student Involvement from other attempts at student engagement and student voice: Positioning students as full owners of what they learn. Involving students on school boards is a step in the right direction; the next question is whether anywhere

in Australia or the U.S. is ready to go the full distance.

Contact

For more information, including training, tools and technical assistance, contact SoundOut coordinator Adam Fletcher at (360) 489-9680 or by emailing adam@commonaction.org.

SCHOOL BOARD STUDENT LEADERSHIP DEVELOPMENT PROGRAM 2014-2015

PURPOSE:

To provide opportunities for a broad spectrum of students to gain a better understanding of how our school system is governed. In so doing, to expand the pool of students who are interested in participating on various school board advisory committees and/or seeking election as the student representative on the School Board.

ELIGIBILITY:

<u>Any high school sophomore or junior</u> in good standing academically or who has been reassigned to an alternative high school would be eligible. Sophomores and juniors are the target audience to begin building a deeper bench of students eligible and willing to serve as the student representative to the School Board.

Students interested in participating would submit a one-page statement of interest to the principal (or the principal's designee). Among other things, the statement should explain: 1) why the student is applying; 2) what he or she hopes to accomplish by participating in the leadership development program; and 3) whether he or she intends to run for the student representative position on the School Board. Each principal will evaluate the essays, as well as the student's academic, extracurricular, and disciplinary record to nominate up to five students. Students should be recommended because of their overall commitment, interest, enthusiasm, and leadership potential viewed in totality. Thus, a C average student with some disciplinary infractions but who shows great potential as a leader could participate in the program.

PROCESS:

Each district School Board member will have the opportunity to select a student who lives in his or her district. At Large members may select any Fairfax County Public Schools student from any high school, including TJHSST and alternative high schools. Selections will be made and announced by the School Board at a regularly scheduled School Board meeting.

2014-2015 PROGRAM REQUIREMENTS:

The Student Leaders are required to attend and participate in:

- A group orientation (in December 2014)
- An observation of one School Board forum work session (in January 2015)

- A Mock Forum (in March 2015)
- A Mock Work Session (in April 2015)
- A Program Completion Ceremony (in June 2015)

In addition, Student Leaders are requested to observe:

- A School Board Regular Meeting (at Jackson Middle School)
- A School Board Work Session (at the Gatehouse Administration Center)
- A Public Hearing (could be viewed on Channel 21 – or in person at Jackson Middle School)

TIMELINE:

- September 12, 2014   Program announced
- October 10, 2014   Applications submitted to principals
- October 24, 2014   Principals submit recommendations to School Board Office
- November 17, 2014   School Board members review applications and announce selections
- December 2014   Students participate in the program by attending various School Board
  through May 2015   meetings and activities
- June 2015   Program completion recognition at a School Board meeting

The Governing Board believes that engaging the student body and seeking its input and feedback regarding the district's educational programs and activities are vital to achieving the district's mission of educating district students. To enhance communication between the Board and the student body and to encourage student involvement in district affairs, the Board shall include at least one student Board member selected by the district's high school students in accordance with procedures approved by the Board.

The term of a student Board member shall be one year, commencing on July 1 of each year. A student Board member shall have the right to attend all Board meetings except closed (executive) sessions. (Education Code 35012)

(cf. 9321 - Closed Session Purposes and Agendas)

A student Board member shall be seated with other members of the Board. In addition, a student Board member shall be recognized at Board meetings as a full member, shall receive all materials presented to other Board members except those related to closed sessions, and may participate in questioning witnesses and discussing issues. (Education Code 35012)

(cf. 9322 - Agenda/Meeting Materials)

A student Board member may cast preferential votes on all matters except those subject to closed session discussion. Preferential votes shall be cast prior to the official Board vote and shall not affect the final numerical outcome of a vote. Preferential votes shall be recorded in the Board minutes. (Education Code 35012)

(cf. 9324 - Minutes and Recordings)

A student Board member may make motions that may be acted upon by the Board, except on matters dealing with employer-employee relations pursuant to Government Code 3540-3549.3. (Education Code 35012)

A student Board member shall be entitled to be reimbursed for mileage to the same extent as other members of the Board but shall not receive compensation for attendance at Board meetings. (Education Code 35012)

(cf. 3350 - Travel Expenses)

(cf. 9250 - Remuneration, Reimbursement and Other Benefits)

Student Board Member Development

As necessary, the Superintendent or designee shall, at district expense, provide learning opportunities to student Board members, through trainings, workshops, and conferences, to enhance their knowledge, understanding, and performance of their Board responsibilities.

The Superintendent or designee may periodically provide an orientation for student Board member candidates to give them an understanding of the responsibilities and expectations of Board service.

Legal Reference:

EDUCATION CODE

33000.5 Appointment of student members to State Board of Education

35012 Board members; number, election and terms; pupil members

GOVERNMENT CODE

3540-3549.3 Educational Employment Relations Act

Management Resources:

WEB SITES

CSBA: http://www.csba.org

California Association of Student Councils: http://www.casc.net

National School Boards Association: http://www.nsba.org

Bylaw RIPON UNIFIED SCHOOL DISTRICT

adopted: December 12, 2011 Ripon, California

Student Board Members

STUDENT BOARD MEMBER GUIDELINES

Duties of Student Board Member

The duties of the student Board member include the following:

1. To provide continuing input for Board deliberations.

2. To strengthen communications between the Board and district students.

3. To represent all students and facilitate the discussion of all sides of issues. This duty does not preclude the student Board member from stating his/her individual opinion.

Selection and Term

The student Board member shall be elected by the students of the district based on the following criteria:

1. The student body of each high school shall have one vote.

2. The vote shall be cast by an elected student representative from each high school campus.

3. The student Board member shall be elected by a majority vote.

4. The term of office shall be July 1 - June 30.

Vacancy

If the position of student Board member becomes vacant, another student Board member shall be elected following the steps listed above.

Board Materials/Information

The Superintendent or designee's office shall provide the student Board member with full and complete agendas and copies of any materials received by the Board except for those materials covered in closed session and any other confidential materials. The Superintendent's office shall serve as the "home office" for the student Board member, where he/she may make use of secretarial facilities and receive advice and/or information upon request.

Exhibit RIPON UNIFIED SCHOOL DISTRICT

version: December 12, 2011 Ripon, California

Clifton High School Student Union draws plans to elect student to school board

CLIFTON — The new Clifton High School Student Union has drawn up plans to elect a student representative to the School Board dais, pending district approval.

Following support from the Board of Education, the Clifton High School Student Union has begun to put together a proposal describing the method to elect its representative. This occurred after several dozen students attended the Oct. 22 Board meeting in support of changing grade weights and the formation of a Student Union.

The Union forwarded copies of the proposal to the Board and Superintendent via email last Friday. The method covers requirements to run, the election process, duties, and means of removing an ineffective non-voting student representative.

The Union document was drafted entirely by students, who said no staff or administration is involved in the Union.

The means of election and requirements as presented by the students are as follows:

Student candidates will present their platform to the Faculty Advisory Committee. Each of the Committee members will cast votes for five candidates based on their presentations, and the students with the five most votes will be listed on the ballot.

Candidates must currently be in their senior year, have a GPA of at least 85, have no disciplinary history, and have sufficient time to attend School Board meetings.

These nominees will each appoint a junior as their alternate, who will attend meetings in the representative's place if needed. Additionally, the alternate will serve as representative from when the acting representative graduates until the next election the following fall.

The representative will be selected by student popular vote from the five senior nominees.

The Board may hold a meeting without the student representative present, but for all televised and public meetings "the student representative must actively sit on the Board."

About 6 percent (according to a 2011 survey by the New Jersey School Boards Association) of districts with a student representative on the School Board select a student through direct election by students, as the Student Union proposes.

The majority of districts with a student representative (about 37 percent) choose the student as a part of the student government, who are also elected by the student body.

At the Oct. 22 School Board meeting, Student Council president Mari Angel Rodriguez said the "SCA (Student Council Association) is not enough." She added the Union is "not condemning" the SCA, but it simply serves a different purpose from the Union.

Superintendent Richard Tardalo said Wednesday he is arranging a meeting with the Student Union for Monday, during which he said he "will address all of [the students' concerns.]"

He confirmed receiving the Union's proposal and has requested it be placed on the Education Committee's agenda along with the grade weighing for Monday.

After it is discussed in the Education Committee it will go to the Policy Committee for discussion, said Tardalo. The policy will need to be read twice before it is official.

Tardalo said Clifton High School principal Anthony Orlando, is extending an invitation to the meeting to the president and vice president of the Student Government Association (SGA), who are "sanctioned to discuss student concerns." He said it is a continuation of the policy which allowed a student to attend Education Committee meetings last year.

CHS's Teacher Advisory Committee also had "several meetings" to discuss student grade weighing, according to Tardalo. He said this had come under discussion prior to students expressing their concerns at the Oct. 22 meeting.

He added members of the Student Union and student body are "welcome to come" to public Board meetings to speak on agenda items and during open session.

Email: katz@northjersey.com

Students Serving on Local School Boards
February 2009
(39 Responding State Associations)

State	Does your state have students serving on local school boards?		How are the student board members selected/elected?
	Yes	**No**	
Alaska	Yes		Appointed by boards.
Arizona	Yes		Depends on district, but it is usually the student body president of one of the high schools.
Arkansas	Yes		Some boards do this, and each one does it differently.
California	Yes		Some are elected; some are appointed.
Connecticut	Yes		Usually by the Principal.
Delaware	Yes		From the Student Council at the high school. Please note: Only two of our 19 school boards have student representation.
Florida	Yes*		Appointed by the school board.
Iowa	Yes		By the board.
Kansas	Yes		
Maryland	Yes		Varies from county to county. Generally, student representatives from each secondary school gather in a kind of mini-election convention and put forth three names for consideration by the boards/superintendents.
Massachusetts	Yes		Usually by the student government of the school.
Michigan	Yes		NR
Minnesota	Yes		Selected by the school board
New Jersey	Yes		Students serving in an advisory capacity are appointed for a one-year term. Students who are 18 years old or older and meet the voting requirements are elected for a three-year term.
New York	Yes		They can be officially elected if they are 18 years old and meet other minimum requirements (rare). Usually they are appointed as ex-officio representatives, typically with non-voting status. The selection of a student representative is a bit complicated. He/she can be identified by a variety of methods, must be recommended by the superintendent and ratified by a majority of the board. The student must be a senior who has attended a high school in the district for at least the last two years.
North Carolina	Yes		Varies. Most select the class president at the high schools.
Oregon	Yes		Each district decides. Most are appointed by the locally elected boards.
Pennsylvania	Yes		Appointment, election, student council president
South Carolina	Yes		
Tennessee	Yes		It varies from system to system.
Utah	Yes		Varies by district.

Does your state have students serving on local school boards?

State	Yes	No	How are the student board members selected/elected?
Vermont	Yes		There is no state requirement for this, but several boards have student representatives who are usually selected by their peers e.g. student council, etc.
Virginia	Yes		Through their respective high school.
Wisconsin	Yes		Appointed
Wyoming	Yes		Various ways -- apply to board, board selects, etc.
Alabama		No	
Georgia		No	
Idaho		No	
Indiana		No	
Louisiana		No	
Mississippi		No	
Missouri		No	
New Mexico		No	
North Dakota		No	
Ohio		No	
Oklahoma		No	
South Dakota		No	
Texas		No	
West Virginia		No	
	Yes = 25	**No = 14**	

*Florida - Seven of 67 school boards have student members.

**New Jersey - Students serving in advisory capacity have no voting representation. Students who are 18 and elected to the board may vote on anything that does not apply to their school.

State	Do the students have voting representation?	What is the term for student board members?	Do you offer a formal association for the students as part of your regular association?	Do you offer special training/seminar sessions for student board members?
Alaska	No	Varies from 1-2 years; based on board policy.	Yes	Yes
Arizona	No	Depends on district but, usually the term of the student body president of one of the high schools.	No	No
Arkansas	No	It varies.	No	No
California	Yes*	One year	No	Yes
Connecticut	No	1 year	No	Yes
Delaware	No	1 year, usually.	No	No
Florida	Some do; some don't	1 year	No	No
Iowa	No	Usually one year	No	No
Kansas	NR		NR	NR
Maryland	Some do; some don't	One year	No	Yes
Massachusetts	No	Undefined by law. Usually one year at a time.	Yes	Yes
Michigan	No	Varies	No	Yes
Minnesota	No	Up to local board.	No	No
New Jersey	**See footnote.	One year for students serving in an advisory capacity; three years for students who are elected.	No	No
New York	No	One year.	No	No
North Carolina	No	One year -- most are just advisory groups to the board.	No	No
Oregon	No	One year	No	No
Pennsylvania	No	Generally, two years.	Yes	Yes
South Carolina	NR		NR	NR
Tennessee	No	Typically one year.	No	No
Utah	No	One Year	No	No

State	Do the students have voting representation? Yes	No	What is the term for student board members?	Do you offer a formal association for the students as part of your regular association? Yes	No	Do you offer special training/seminar sessions for student board members? Yes	No
Vermont		No	Usually one year.		No		No
Virginia		No	One year	Yes		Yes	
Wisconsin		No	One year		No		No
Wyoming		No	One year		No		No
Alabama							
Georgia							
Idaho							
Indiana							
Louisiana							
Mississippi							
Missouri							
New Mexico							
North Dakota							
Ohio							
Oklahoma							
South Dakota							
Texas							
West Virginia							
	Yes = 1 No = 19 Some do; some don't = 2 NR = 2			Yes = 4 No = 19 NR = 2		Yes = 8 No = 15 NR = 2	

NR= No Response

*CA - Has preferential voting. Students vote prior to board of directors to voice their opinion. Their vote does not affect final outcome.

4

State	If yes, please describe:	Do the students pay annual "student association" fees?	
		Yes	**No**
Alaska	Two Youth Leadership Programs -- one during annual conference and another during Legislative Network program		No
Arizona			No
Arkansas			No
California	Special strand/sessions at our annual education conference -- just for student board members.		No
Connecticut	We try to host a workshop for them at our annual convention,		No
Delaware			No
Florida			No
Iowa			No
Kansas		NR	NR
Maryland	New member training -- 2 days; admission to academic courses.		No
Massachusetts	We have done student school committee member orientation when asked to do so.		No
Michigan			No
Minnesota	Secondary school principals through Honor Society group.		No
New Jersey		NR	NR
New York			No
North Carolina	We did have an ex-officio student travel with her board to one of our meetings.		No
Oregon	The administrators' association in Oregon provides a leadership conference at which districts are welcome to send student board members.		No
Pennsylvania	We have a student program at our annual conference that is attended by many student reps to boards.		No
South Carolina		NR	NR
Tennessee			No
Utah			No

5

State	If yes, please describe:	Do the students pay annual "student association" fees? Yes	No
Vermont			No
Virginia	Special seminar sessions at annual conventions		No
Wisconsin			No
Wyoming			No
Alabama			
Georgia			
Idaho			
Indiana			
Louisiana			
Mississippi			
Missouri			
New Mexico			
North Dakota			
Ohio			
Oklahoma			
South Dakota			
Texas			
West Virginia			

Yes = 0 No = 22
NR=3

State	What educational opportunities does the state association offer to student board members beyond those listed previously?
Alaska	They are able to attend any of our regular programs with board approval.
Arizona	Same as other board members.
Arkansas	
California	None
Connecticut	None
Delaware	None
Florida	None
Iowa	None
Kansas	None
Maryland	
Massachusetts	They are invited, without fee, to attend our state house "Day on the Hill."
Michigan	
Minnesota	Can participate in normal board training. We have student school board members speak at a workshop/breakout to regular school board members at our annual convention
New Jersey	
New York	None.
North Carolina	None.
Oregon	None
Pennsylvania	None
South Carolina	
Tennessee	We invite them to all board seminars/workshops, etc.
Utah	Invited to all state association events with their local board.

7

State	What educational opportunities does the state association offer to student board members beyond those listed previously?
Vermont	None. We should make clear that our association has resisted attempts to make student representation on boards a requirement. We oppose giving students voting status on boards, and we do not subscribe to the "out of the mouths of babes" model of school governance. We believe that student reps on local boards can fill useful advisory roles, but we believe that individual boards should decide whether to include students as advisory board members.
Virginia	Attendance at all VSBA conferences, networking of students at board meetings.
Wisconsin	
Wyoming	None, they can attend the annual conference or board training just like any other board member
Alabama	
Georgia	
Idaho	
Indiana	
Louisiana	
Mississippi	
Missouri	
New Mexico	
North Dakota	
Ohio	
Oklahoma	
South Dakota	
Texas	
West Virginia	

**Special Board of Education Meeting
Annual Planning Workshop
January 31, 2015**

3.a Board Governance

1. Next Steps

Please review first four (4) pages.

**3.b National Association of School Board Conference
– Denver 2017**

3.c Board Review of Meetings

1. Board Meeting Evaluation Form

NextSteps...

Wisdom from across the country on being great at governing...

- -

LIGHTHOUSE HABITS AND STANDARDS

The best research on what it takes to provide great governing comes from the Lighthouse Project, based in the Iowa Association of School Boards and networked throughtout the country.

Five core roles...

- Setting clear expectations
- Creating conditions for success
- Holding system accountable to expectations
- Building collective will
- Learning together as a board team

Seven standards...

- Operating as a visionary, ethical governance team
- Providing effective leadership for improved student learning
- Acting with fiscal responsibility
- Complying with state/federal law and board policy

- Establishing a human resource system that enables all people to contribute meaningfully
- Ensuring safe and equitable access to learning
- Building effective legislative and community relationships

For an overview of the Lighthouse work, go here. For a detailed report, go here.

- -

FOUNDATION PRINCIPLES OF EFFECTIVE GOVERNANCE

Illinois leaders have long framed "the work of great governing" around foundational principles.

The collective wisdom is always introduced with language of social, moral and legal responsibility: "

As the corporate entity charged by law with governing a school district, each School Board sits in trust for its entire community. The obligation to govern effectively imposes some fundamental duties on the Board:"

- The Board Clarifies the District Purpose.
- The Board Connects With the Community.
- The Board Employs a Superintendent.
- The Board Delegates Authority.
- The Board Monitors Performance.
- The Board Takes Responsibility For Itself.

For details, go here.

- -

EIGHT CHARACTERISTICS OF EFFECTIVE SCHOOL BOARDS

From the Center for Public Education:

"What makes an effective school board – one that positively impacts student achievement? From a research perspective, it's a complex question. It involves evaluating virtually all functions of a board, from internal governance and policy formulation to communication with teachers, building administrators, and the public. But the research that exists is clear: boards in high-achieving districts exhibit habits and characteristics that are markedly different from boards in low-achieving districts. So what do these boards do? Here are eight characteristics."

- Effective school boards commit to a vision of high expectations for student achievement and quality instruction and define clear goals toward that vision.
- Effective school boards have strong shared beliefs and values about what is possible for students and their ability to learn, and of the system and its ability to teach all children at high levels.
- Effective school boards are accountability driven, spending less time on operational issues and more time focused on policies to improve student achievement. I
- Effective school boards have a collaborative relationship with staff and the community and establish a strong communications structure to inform and engage both internal and external stakeholders in setting and achieving district goals.
- Effective school boards are data savvy: they embrace and monitor data, even when the information is negative, and use it to drive continuous improvement.
- Effective school boards align and sustain resources, such as professional development, to meet district goals.
- Effective school boards lead as a united team with the superintendent, each from their respective roles, with strong collaboration and mutual trust.
- Effective school boards take part in team development and training, sometimes with their superintendents, to build shared knowledge, values and commitments for their improvement efforts. High-achieving districts had formal, deliberate training for new board members. They also often gathered to discuss specific topics.

For the detail list, go here.

- -

NINE ESSENTIAL PRINCIPLES

Collective wisdom of Oregon board leaders has identified nine principles of a

successful school board members. Here's a quick glimpse:

- The child comes first!
- School boards are community members who establish rules for how the district is run...
- School board members function as a board; not individually...
- The board sets the policies...carrying out board policies is the responsibility of the superintendent and those under his or her authority...
- Know your schools...
- School board members are the people's representatives in the school program...A great many people do not understand the limitations of a board member's authority.
- Effective boardsmanship means being able to voice the minority opinion when voting on an issue, then supporting the majority vote in the community...
- Being an effective board member means participating in regional, state and national meetings.
- Abiding by code of conduct and board member ethics is important...
- Enjoy your work as a school board member...

For more, go here.

- -

FIVE TRAITS OF HIGH-IMPACT SCHOOL BOARDS

- Concentration on governing above all other board work
- Development of the board's capacity to govern
- Active participation in leading district strategic change
- Meticulous attention to keeping the board-superintendent partnership healthy
- Active participation in reaching out a wider community

- from board effectiveness guru Doug Eadie's *Five Habits of High-Impact School Boards*

- -

THE 1O PRINCIPLES OF POLICY GOVERNANCE (simplified)

- Govern on behalf of ownership
- Speak with one voice
- Make policy decisions
- Policy formed from large issues/values then adds necessary detail
- Define and delegate, rather than react and ratify
- Focus on ends not means
- Set boundaries rather than prescriptions
- Own, develop and improve board effectiveness
- Foster relationship with management that's empowering, safe and effective
- Monitor performance constantly with rigor

- -

NINE HABITS OF INEFFECTIVE BOARDS

- Disregard the agenda process and chain-of-command
- Confuse their roles with that of superintendent and staff
- Nit-pick
- Micro-manage
- Play to the media
- Focus on their personal interests
- Have interpersonal conflict with other board members or staff
- Commit limited time or energy to improving governance

- -

SUSTAINING BEHAVIORS OF EFFECTIVE BOARDS

- Establishment of governance protocols and norms for how the team will operate when they are working together
- System of response when protocols are not followed by members of the team
- Revisiting protocols for possible revisions
- Setting meeting norms
- Determination of long and short term goals
- Regular review of practices and accountability for the practices
- Effective evaluation of the board and the superintendent
- Understanding of effective team behaviors
- Retreat opportunities for the governance team to discuss big ideas and revisit their beliefs and practices
- New board member orientation to the district and the board operations
- Review of board policies on a regular basis
- Regular professional development for the superintendent and board around important topics
- Training for board presidents in managing meetings
- Communications protocols for board members, especially in times of crisis
- Regular updates from departments such as business, human resources, and educational services
- Budget processes and procedures
- Legal updates as needed
- Student achievement discussions and focus

- from the Educational Policy Institute of California (for the brief, go here)

- -

"FOUR SACRED DUTIES"

1. Establish and promulgate ownership of the district's vision and values
2. Articulate expected district results and monitor progress

3. Create the conditions for achievement of the district's vision, values and expected results through effective use of the five areas of board authority: Promulgation of policies;, governing the use of community fiscal resources for education; engaging the community in its schools; Sustaining an effective board-executive relationship; negotiating and approving contracts

4. Ensure a community-wide climate of commitment, respect and trust

- from *Doing The Right Thing – The Panasonic Foundation's Guide for Effective School Boards*

An anytime-anywhere resource for board leaders advancing excellence through supports of the member relations team, Colorado Association of School Boards, 800.530.8430, 303.832.1000, 1200 Grant Street, Denver, Colorado 80203, Randy Black, rblack@casb.org, tweeting @randycasb

NextSteps...

Tips for maximizing the seasons of board development...

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PRE-CANDIDACY SEASON

- Encourage key volunteers/leaders in your system and community – "Have you ever considered being a board member…?"

- Invite "interested leaders" to three board meetings in a row, each with an early greeting time just prior to the official meeting

- Host a "learn about the board education" conversation ith local members describing the function and challenges.

- Invite "interested leaders" to a process similar to a series of sessions, specifically designed to envision and equip potential members for the challenges facing the district and the teamWORK needed for great governing

- News release/coverage of the election cycle, qualities of excellent boards…

- Begin using CASB assets for the cycle (GreatGoverning blog, Leadership Workbook, letter to editor, news release concepts, online resources, critical issues sheet, special session at fall regionals…)

- - - - - - - - - - - - - - - - - - -

CANDIDACY SEASON

- Encourage/host a local candidates night, coffee, breakfast…
- Join together with area boards to host a regional candidates night featuring a wisdom panel of veterans, presentations by CASB staffers and open discussion
- Provide candidates with documents from your work to be a highly-effective governance team
- Specifically invite candidates to all governance meetings or major opportunities with constituents
- Have "focus sessions," hosted by a board member and a key administrator, to help candidates develop depth with the team's top priorities (increasing student achievement, financial stability, staff support and development, community engagement, governance effectiveness…)
- Add candidates to your "announcement of meetings"
- Deliver a candidate's version of each board packet
- Veteran-candidate "buddy" process of coffees, phone calls or pre/post meeting chats
- Invest in each candidate to attend the CASB regional and fall conference (cover registration, ride together, debrief, discuss at next regular meeting…)
- Send candidates copies of CASB communications

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JUST-ELECTED SEASON

- Celebrate the "swearing in moment" with special reception, stories and mementos involving veterans and retirees
- Have a new team discussion of hopes and priorities within a month of the election
- Veteran-rookie mentoring process for first three months
- Clarify the new team's framework of excellence by the end of January [mission, goals, roles, core values/norms…]
- Whole team travel and participation in the CASB convention (road-trip stories, pre-convention track for new members, team "attack" plan for the convention, what-are-we-discovering team coffees every day, learning discussion at first meeting upon return…)
- Develop a quarterly "learning community" with area teams or area new members
- Use CASB's Leadership WORKbook, website resources and GreatGoverning

blog as constant support s for advancing your individual and team effectiveness

- Contact your CASB staff – confidential counsel, research and direct services are as close as 800-530-8430, 303-832-1000, 303-832-1086 (fax)

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CONSTANT MODELING

- Clarify, declare and "live well" the governing team's mission, roles, goals, operating norms, and values
- Work to be supportive and healthily challenging of each member of the governance team (elected and paid members) and the team in general
- Align the agenda (the map of the team's time and energy) to the mission, roles, goals and values
- Emphasize listening and learning, constantly
- "Majoring in the majors, not the minors" a key habit
- Develop an ongoing strategy to encourage and develop the "next generation" of governance
- Ensure the development of members and the team is a planned and ongoing investment by all

GOVERNANCE
Doug Eadie

The Cultured Club

How can you make sure that your board members work through complex issues in a harmonious fashion and treat one other with respect? Define and work on the board's 'culture'

"**Y**ou can't believe how negative our board's culture is," a participant in my governance workshop for superintendents and school board members observed several months ago. "I'd really like to know how we can turn things around, because the constant bickering and rude comments are wearing us all out emotionally, and we're building up quite a backlog of unaddressed issues, to boot."

The board member went on to say: "Frankly, it's not much fun being on the board. Actually, it's becoming pretty depressing, and I'm wondering if I'll run again when my term is up."

Sound familiar? This isn't an unusual lament in my workshops. I frequently hear about dysfunctional board "cultures," and I'm often asked for practical guidance on building a positive one. My initial response is always, as it was on this most recent occasion, to ask for a definition of "culture."

It never takes long to establish that "culture" is an amorphous concept that's hard to get your arms around, and that it means lots of things to different people. For example, to the participants in this particular workshop it

meant "what it feels like on this board," "our shared values," "how we treat each other in our deliberations," "our guidelines for interacting with each other," and "how we go about doing our governing work," to mention just a few of the responses.

Without trying to pin the concept down precisely, let's just say that a board's culture reflects the beliefs, principles, and attitudes about working together in the governing enterprise. We know a positive board culture when we see it: Members work through complex issues in a harmonious fashion and treat one other with respect.

When a board culture is described as "dysfunctional," in my experience, it usually means that the governing process is either highly adversarial and/or characterized by uncivil interactions, and it almost always takes a tremendous toll over time, not just in terms of emotional stress, but also in poor decision-making.

So what can we do to build a positive board culture that is conducive to high-impact governing?

Changed attitudes not enough

Experience has taught me that there's no point in trying to preach to board members or teach them how to become a more positive, cohesive governing team. More effective, but not by much, is the formal team-building or human relations approach. I often tell workshop participants a true story to illustrate the point.

A few years ago I was retained to work with a school board that, six months earlier, had spent a whole weekend engaging in team-building exercises in a sylvan setting 25 miles

away from the district office. They worked with a very capable facilitator, as far as I could tell.

The event clearly met the "touchy-feely" gold standard. My early interviews with board members indicated that they really had gotten to know one another more deeply over the course of this very intensive weekend. They'd told one another the stories of their lives—where they'd grown up, about their mates and kids, the progression of their careers and interests—and had gotten down to brass tacks in terms of identifying barriers to communicating effectively.

They even managed to fashion a detailed set of guidelines for working together. One example was, "We will without fail treat each other with respect, never impugning each other's motives or personally attacking each other; we will listen respectfully to each other's points when considering an issue, without interruption; we will never cut each other down publicly, even though we might disagree vehemently on a particular issue under consideration."

As I listened to the accounts of this weekend in my interviews, I couldn't help but be impressed by the nostalgia board members felt about the experience. It was clearly a shining milestone in their history, and I even felt tears—well, maybe a tear or two—as board members described the weekend.

A fading glow

So, you might rightly ask at this point, why was I retained to work with this board when it already had gone through an intensive team-building experience? The fact is, it was anything but a cohesive governing team when I entered the picture, and the warm glow of that intensive weekend together hadn't lasted long.

When I arrived, bickering was rife, tensions were high, nerves were badly frayed, and issues were piling up unaddressed. It hadn't taken long to erase the glow as they worked to deal with challenging governing questions.

The district was dealing with, among other things, a serious budget shortfall projected for the year after next, demographic shifts that raised the issue of redrawing building boundaries, a seriously underperforming elementary school, and growing community opposition to a critical capital construction tax levy under consideration.

So why, when the board had been well trained to work together as a governing team and everyone agreed to guidelines for civil discourse, did the problems persist?

In a nutshell, the board members returned to basically the same governing organization they had left when they set out for the retreat. It was the same governing structure with the same governing processes. Attitudes changed, commitments changed, the people changed, but the governing organization they returned to was the one they'd left. So it didn't take long to erase the glow.

A balanced approach

What was the solution? Put simply, structure and process had to be updated so that new attitudes and commitments could be translated into concrete governing results. In other words, the governing architecture needed to be modernized.

Over the years, I've learned again and again that high-impact boards that make a significant difference in their districts' affairs—the ones that handle the truly high-stakes, really complex issues effectively—marry the board members' commitment to a well-designed structure and process. The result is a positive board culture.

This particular story had a happy ending. We employed a task force of board members and the superintendent to come up with very detailed, practical enhancements in board structure and governing processes, including standing committees that correspond to the board's basic governing functions (board operations, planning and development, performance monitoring, and community relations).

The task force also developed a well-designed process for board involvement in strategic and operational planning/budget development.

By marrying structure and process to attitude—pairing people with the "machine," if you will—we made it possible to build and maintain a positive, productive board culture with real staying power.

Isn't that what we're all seeking? ∎

Doug Eadie (doug@dougeadie.com), an *ASBJ* contributing editor, is founder and CEO of Doug Eadie & Company. He is the author of 17 books on board and CEO leadership, including *Five Habits of High-Impact School Boards* (Scarecrow Education and National School Boards Association, 2005).

The Keys to Board Excellence

For your work to be highly effective, a data-driven approach to improving teaching and learning is necessary. And you must have a plan in place to pull it off

School board president Carol Frank left her post at the 1,500-student Marcus Whitman Central School District in upstate New York with a parting message: "I have learned that excellence in the classroom begins with excellence in the boardroom."

During her tenure, the board hired an assistant superintendent to oversee K-12 curriculum in the district's four schools and revised the budget process to focus on the district's primary mission: educating kids.

Frank urged the new president and board members to "move to a higher level of governance that is truly student centered." And she advised them to make teaching and learning the board's top priority, noting the district's "mediocre to poor student achievement" despite the board's high per-pupil spending.

In Arkansas, Danna Schneider, president of the Clarksville School District's board of education, said board members used the National School Boards Association's *Key Work of School Boards* to examine "all aspects of a school board's functions." The board grappled with its shortcomings and then developed a mission statement, a vision, and a plan to encourage community involvement in Clarksville's five schools.

Schneider says the board is concentrating on improving teaching and learning. It's exerting stronger leadership over curriculum, making policies to fit with federal and state requirements, and holding public forums to discuss the future of the schools.

Effective school boards

Carter Ward, executive director of the Missouri School Boards Association, and Arthur Griffin, with 18 years of service on North Carolina's Charlotte-Mecklenburg Board of Education, say the best school boards focus on academic achievement.

Ward and Griffin, both associated with CTB/McGraw-Hill, publisher of standardized achievement tests, say the company's panel of top educators studied school boards and found that highly effective boards work on these priorities:

■ **Focus on student achievement.** The best boards target policies and resources to promote achievement for all students. They concentrate on high standards, a rigorous curriculum, and high-quality teachers. They make decisions based on the core business of schools—student achievement.

■ **Allocate resources to needs.** The best boards allot time, money, and personnel to the lowest-achieving schools. They create policies and budgets to support teaching and learning, and they refuse to protect so-called sacred cows.

■ **Monitor returns on investments.** The best boards hold their members and school employees accountable. They ask, "What services are we providing to which students at what cost, and what are the benefits and results?"

■ **Use data.** The best boards use data to make informed decisions and develop policies. They review disaggregated data on students' gender, race, and socioeconomic status to ensure that all students are treated fairly and have equal opportunities to learn. They demand truthful and complete data on new programs to gauge results.

■ **Engage communities.** The best boards develop partnerships with parents and residents. They invite constituents to help determine the district's vision, values, and short-term and long-term priorities.

The panel's list is valuable, but it won't help if board members simply file it away. Ward and Griffin say board members require extensive training to turn the panel's recommendations into practice.

Factors for improving achievement

The Iowa Association of School Boards (IASB) also urges boards to focus on teaching and learning. IASB advises boards to study these factors that, taken together, "paint an overall picture of student achievement."

■ **Attainment.** How are students performing at a given point? Look beyond more than one set of scores, such as math results for all fourth-

graders. Develop a precise picture of achievement by examining student subgroups according to school buildings, grade levels, and individual classrooms.

■ **Growth.** Are all students progressing at an acceptable rate? Compare the current year's attainment with previous years. Combine growth rates with attainment to determine how well achievement is improving. Target funds to high-need groups.

■ **Gap.** Do attainment and growth differ according to student subgroups? Disaggregate test scores according to students' gender, race, ethnicity, economic level, and special needs. Look for achievement gaps in student data, such as attendance, grade level retention, and student mobility.

Board members should never accept excuses for poor performance and disparities in achievement, IASB says. Members should become "informed activists" by studying tests and assessments, sorting and classifying student data, updating district goals, and supporting reforms to improve teaching and learning.

Another way to be effective: Stick around for awhile. Iowa State University researcher Tom Alsbury's seven-year study of school board turnover and student achievement in 176 Washington state districts suggests that high board turnover corresponds to lower student achievement. Boards with high turnover—the result of election defeats, resignations, and retirements—spend more time "tinkering with organizational minutiae" than on improving teaching and learning, Alsbury says.

Hands-on for achievement

In the 1990s, many school boards abandoned their long-standing "low-key, hands-off" approach to achievement and adopted achievement as their "central concern," according to

the 2006 *Informed Educator* report of the Educational Research Service.

ERS's Gordon Cawelti, former senior research associate, and Nancy Protheroe, director of special research projects, examined six districts that had rapidly improved student achievement. Board members and superintendents in each district publicly acknowledged poor student performance. Then they went to work, forming partnerships to design school improvement plans, studying assessment data, setting high expectations for all students, and accepting "no excuses" for low achievement.

Reforms can be tough to enact, especially in inner city schools, says Fred Doolittle, director of policy research and evaluation for MDRC, a social policy research organization based in New York and California.

Doolittle and his research team studied three large urban districts—the Houston Independent School District, the Charlotte-Mecklenburg Schools, and the Sacramento Unified School District—that managed to raise academic performance and reduce racial achievement gaps district wide.

The districts' achievements are all the more notable given the array of serious challenges they faced at their lowest points.

School boards were "divided into factions," feuding over power to control promotions, hiring and firing, and contracts for supplies and services. Disputes among board members, superintendents, principals, and teachers were "serious and personal." Central offices were overly bureaucratic and budgets poorly managed. Low-income students frequently changed schools. Teachers were largely inexperienced, poorly trained, and likely to leave after a year or two. Furthermore, they typically expected little from poor and minority students, and their lessons were seldom

challenging.

But the districts didn't plunge straightaway into tackling these problems. They began by adopting "preconditions for reform." Boards, for example, were expected to focus on policies related to student achievement and superintendents to plan reforms in consultation with board members.

The districts' plans varied somewhat, but Doolittle says they shared similar strategies:

■ Make academic achievement the district's primary objective. Develop a district-wide curriculum that corresponds to state standards. Ensure that teachers apply the standards, and hold district officials and building-level staff accountable for results.

■ Focus on the lowest-performing schools by raising the quality of teachers and administrators and providing adequate resources. Concentrate on improving elementary schools first, and then move on to middle schools and high schools.

■ Provide professional development for all teachers, and require intensive training in reading and math for middle and high school teachers.

■ Use data to make decisions about teaching and learning and to target areas for improvement.

Trends indicate that the districts have made progress, even outpacing statewide gains in some areas. Achievement improved most in elementary schools, somewhat in middle schools, and least in high schools, MDRC reports.

I hope every school board member will remember Carol Frank's parting words. Excellence in the boardroom is the first step to excellent achievement in your schools. ■

Susan Black, an *ASBJ* contributing editor, is an education researcher and writer in Hammondsport, N.Y.

High Stakes Strategy

As part of your long-range planning, school board members and administrators need to consider what role outside groups and organizations should play in your district's future

The strategic governing team of Illinois' Community Consolidated School District 181 spent two days together in an intensive "strategic work session" last spring. Employing 10 different breakout groups over the course of the session, the team of school board members, superintendent, and senior administrators brainstormed about the district's values and vision statements; assessed internal strengths and weaknesses; identified important national, state, and local conditions and trends; and identified potential changes needed to address what appeared to be critical issues facing the district.

The board's planning and development committee, which designed and hosted the work session, added spice to the already rich strategic planning stew

by inviting a number of external organizations to participate. Those who accepted the invitation, including the executive director of the Hinsdale Center for the Arts, the vice president of the Clarendon Hills Park Board, the president of the Village of Hinsdale, and the superintendent of neighboring High School District 86, helped make the session a more powerful strategic planning event.

"Not only did the stakeholder representatives add valuable experience, expertise, and knowledge to our deliberations, they also got to know our district much better, so friend-building was an important outcome," a CCSD 181 board member said afterward.

A high-priority board concern

The CCSD 181 strategic work session is a good example of creative stakeholder relations management, which should be a high-priority concern of every school board, and especially of your board's external or community relations committee. I define stakeholders very simply as any group, organization, or institution that it makes sense for your district's strategic governing team to maintain a more or less close relationship with.

Every district has purely internal stakeholders—the school board, employees, and parent-teacher organizations—who are directly involved in leading and

managing the organization. Your district's direct "customers" and beneficiaries—the students and their families—can be thought of as an external/internal hybrid. And then there are purely external community stakeholders, such as city and county government, civic clubs, and chambers of commerce.

Typically, in my experience, strategic governing teams pay pretty close attention to the internal and hybrid stakeholders, but external stakeholder relations often are neglected. This has a potentially steep cost in terms of inadequate community understanding and support for the district.

External stakeholders can be divided into three broad categories:

■ Top-tier stakeholders always require close attention because consistently high stakes are involved. These may include: your state government department responsible for K-12 education; the independent nonprofit education foundation that raises money for special district needs; the chamber of commerce, whose education committee has been actively involved for years in supporting your district's capital levies; city and county government, whose support for district tax issues is critical; and the print and broadcast media.

■ Second-tier stakeholders need to be monitored to determine whether the stakes surrounding their issues have increased enough to merit closer attention, but generally they do not require explicit management. These are often "sleeping dogs" such as community organizations that might suddenly become energized over a particular educational issue, such as a property tax increase.

■ Ad hoc strategic stakeholders are critical to accomplishing particular

strategic targets, such as the worker retraining program that your district is testing in partnership with the local community college. These groups may fade in importance after the strategic target has been accomplished.

The board's involvement

Why should your school board, or perhaps your external or community relations committee, be involved in building and maintaining stakeholder relations? I have four compelling reasons.

First, the stakes involved in particular relationships can be incredibly high. Second, most, if not all, of your board members are knowledgeable about these groups and often are closely connected to them. Third, successfully building and maintaining relationships with top-tier stakeholders often demands the involvement of your district's highest-ranking leaders, including those at the board level.

Finally, when your strategic governing team makes a list of stakeholders that your district needs to pay close attention to, you are likely to be amazed at the number and variety. Even if the superintendent and top administrators devoted all of their time to stakeholder management, seven days a week, from early morning until late evening, they still could not cover the whole list effectively.

Your district's stakeholder relations program should consist of the following key elements:

■ Identifying the key stakeholders and calculating the stakes involved.

■ Determining the strategic governing team members who should have primary accountability for developing and carrying out the relationship with each of the top-tier stakeholders.

■ Developing a detailed strategy for building and maintaining each top-tier relationship.

■ Overseeing and managing the program's implementation.

A key responsibility for your board's external relations committee is to make sure that each of these elements is fully developed and carried out. Committee members should play a hands-on role in identifying and rank-ordering stakeholders, reviewing your strategies for managing relationships, and overseeing their implementation.

On occasion, committee members must play a hands-on role in developing and managing relationships with particular key leaders. Board members often are executives, board members, or dues-paying members of the very stakeholder organizations with which your district wants to build a relationship. Who is better to be engaged in the strategy?

Frequently, one of your school board members is closely connected with the CEO or particular board members of a key stakeholder organization, and hence can help to initiate or cement a working partnership.

Bottom line: Stakeholder relationships are far too important to your district's welfare to take a catch-as-catch-can approach, or just to rely on squeaky wheels to tell you when you need to pay attention to a particular relationship. The health of these relationships depends on meticulous planning and execution, and detailed board involvement is a must. ■

Doug Eadie (doug@dougeadie.com), an *ASBJ* contributing editor, is founder and CEO of Doug Eadie & Company. He is the author of 17 books on board and CEO leadership, including *Five Habits of High-Impact School Boards* (Scarecrow Education and National School Boards Association, 2005).

BOARD MEETING EVALUATION FORM

		OK	Needs Improvement	Suggestions for Improvement
1.	The agenda focused on issues of long-term importance, with support from necessary documents.			
2.	Reports were clear and contained needed information.			
3.	We avoided getting into administrative/management details.			
4.	The chair guided the meeting effectively with the director's assistance.			
5.	Next steps were identified and responsibly assigned.			

Meeting Date: Director/Chief Officer:

Special Board of Education Meeting
Annual Planning Workshop
January 31, 2015

4.a Performance Excellence – Improvement Processes

1. From Fighting Fire to Innovation: An Analogy for Learning

Please review first four (4) pages.

4.b Jim Collins' 12 Questions

1. Jim's Twelve Questions
2. Where Are You On Your Journey from Good to Great?
3. Discussion Guide

From Fighting Fires to Innovation: An Analogy for Learning

Learning is an essential attribute of high-performing organizations. Effective, well-deployed organizational learning can help an organization improve from the early stages of reacting to problems to the highest levels of organization-wide improvement, refinement, and innovation.

1
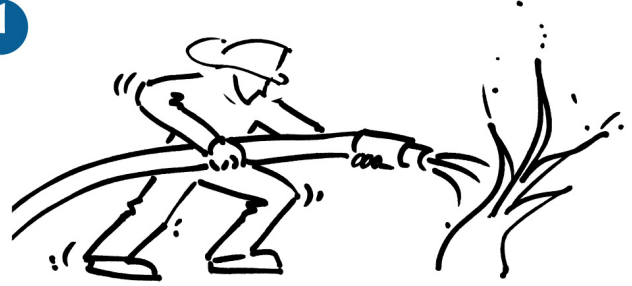
Reacting to the problem (0–5%)
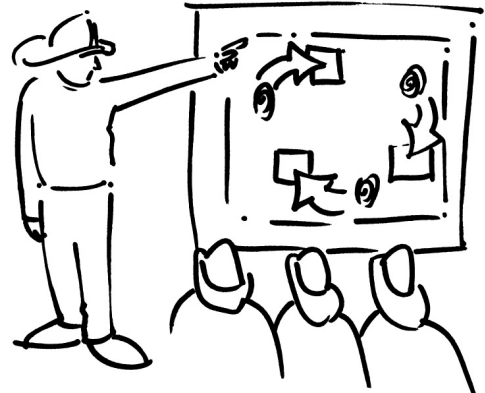
Run with the hose and put out the fire.

2
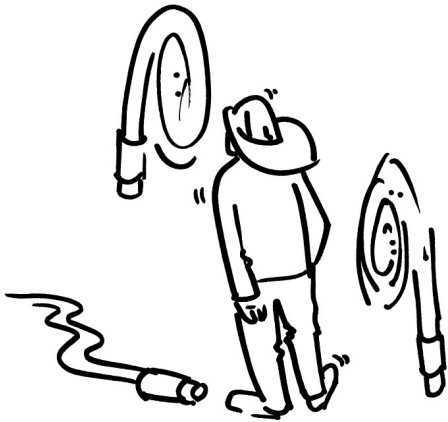
General improvement orientation (10–25%)

Install more fire hoses to get to the fires quickly and reduce their impact.
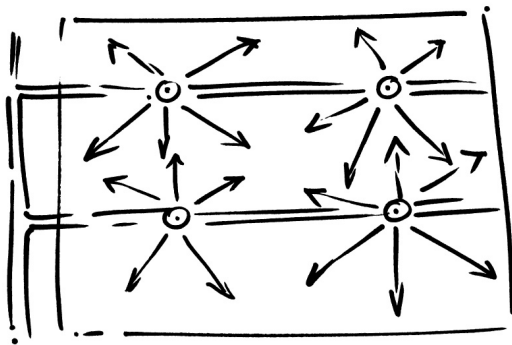
3

Systematic evaluation and improvement (30–45%)

Evaluate which locations are most susceptible to fire. Install heat sensors and sprinklers in those locations.
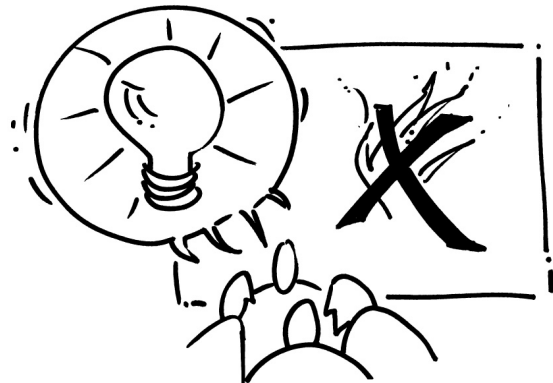
4

Learning and strategic improvement (50–65%)

Install systemwide heat sensors and a sprinkler system that is activated by the heat preceding fires.

5

Organizational analysis and innovation (70–100%)

Use fireproof and fire-retardant materials. Replace combustible liquids with water-based liquids. Prevention is the primary approach for protection, with sensors and sprinklers as the secondary line of protection. This approach has been shared with all facilities and is practiced in all locations.
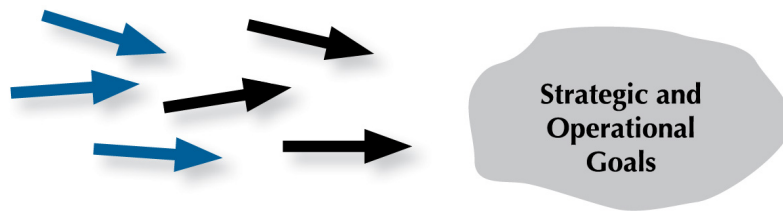
Steps toward Mature Processes
An Aid for Assessing and Scoring Process Items

Reacting to Problems (0–25%)
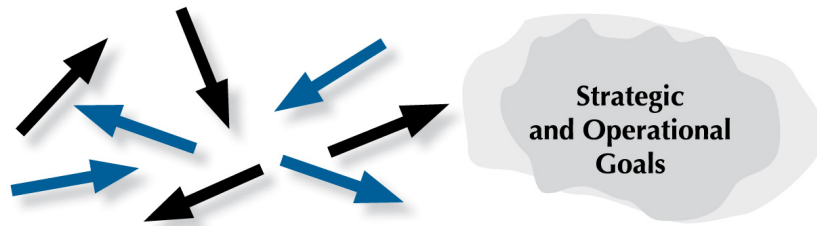
Operations are characterized by activities rather than by processes, and they are largely responsive to immediate needs or problems. Goals are poorly defined.

Early Systematic Approaches (30–45%)

The organization is beginning to carry out operations with repeatable processes, evaluation, and improvement, and there is some early coordination among organizational units. Strategy and quantitative goals are being defined.

Aligned Approaches (50–65%)
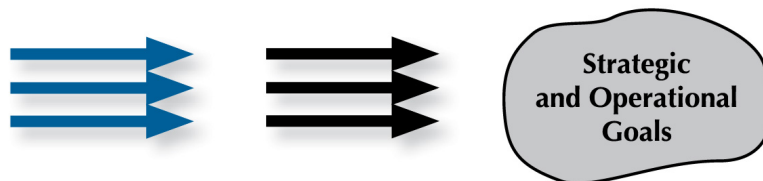
Operations are characterized by repeatable processes that are regularly evaluated for improvement. Learnings are shared, and there is coordination among organizational units. Processes address key strategies and goals.

Integrated Approaches (70–100%)
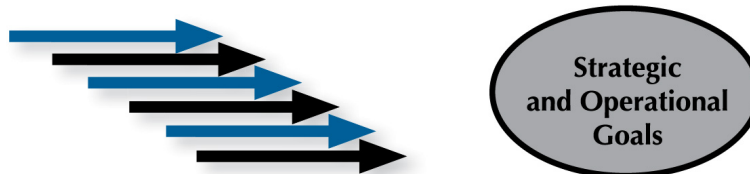
Operations are characterized by repeatable processes that are regularly evaluated for change and improvement in collaboration with other affected units. The organization seeks and achieves efficiencies across units through analysis, innovation, and the sharing of information and knowledge. Processes and measures track progress on key strategic and operational goals.

Contents

On the Web

Category and Item Commentary (http://www.nist.gov/baldrige/publications/education_criteria.cfm)

This commentary on the Criteria provides additional examples and guidance.

3.1b. You might use any or all of the following to determine student and other customer satisfaction and dissatisfaction: surveys, formal and informal feedback, dropout and absenteeism rates, student conflict data, complaints, and student referral rates. You might gather information on the web, through personal contact or a third party, or by mail. Determining student and other customer dissatisfaction should be seen as more than reviewing low customer satisfaction scores. Dissatisfaction should be independently determined to identify root causes and enable a systematic remedy to avoid future dissatisfaction.

3.1b(2). Information you obtain on relative student and other customer satisfaction may include comparisons with competitors, comparisons with other organizations that deliver similar educational programs or services in a noncompetitive market, or comparisons obtained through education industry or other organizations. Information obtained on relative student and other customer satisfaction may also include information on why students and other customers choose your competitors over you.

For additional guidance on this item, see the Category and Item Commentary (http://www.nist.gov/baldrige /publications/education_criteria.cfm).

3.2 Customer Engagement: How do you engage students and other customers by serving their needs and building relationships? (45 pts.)

In your response, include answers to the following questions:

a. Program and Service Offerings and Student and Other CUSTOMER Support

(1) Program and Service Offerings **HOW do you determine EDUCATIONAL PROGRAM AND SERVICE offerings?** HOW do you

- determine student, other CUSTOMER, and market needs and requirements for EDUCATIONAL PROGRAM AND SERVICE offerings;
- identify and adapt program and service offerings to meet the requirements and exceed the expectations of your student and other CUSTOMER groups and market SEGMENTS; and
- identify and adapt program and service offerings to enter new markets, to attract new students and other CUSTOMERS, and to create opportunities to expand relationships with current students and other CUSTOMERS, as appropriate?

(2) Student and Other CUSTOMER Support **HOW do you enable students and other CUSTOMERS to seek information and support?** HOW do you enable them to obtain EDUCATIONAL PROGRAMS AND SERVICES from you? What are your KEY means of student and other CUSTOMER support, including your KEY communication mechanisms? HOW do they vary for different student and other CUSTOMER groups or market SEGMENTS? HOW do you

- determine your students' and other CUSTOMERS' KEY support requirements and
- DEPLOY these requirements to all people and PROCESSES involved in student and other CUSTOMER support?

(3) Student and Other CUSTOMER Segmentation **HOW do you determine your CUSTOMER groups and market SEGMENTS?** HOW do you

- use information on students, other CUSTOMERS, markets, and EDUCATIONAL PROGRAM AND SERVICE offerings to identify current and anticipate future student and other CUSTOMER groups and market SEGMENTS;
- consider competitors' students and other CUSTOMERS as well as other potential students, other CUSTOMERS, and markets in this segmentation; and
- determine which student and other CUSTOMER groups and market SEGMENTS to emphasize and pursue for growth?

(Continued on the next page)

　　　　　　　　　　　　　　　　　2015–2016 Education Criteria for Performance Excellence

b. Student and Other CUSTOMER Relationships

(1) Relationship Management   HOW do you build and manage relationships with students and other CUSTOMERS? HOW do you market, build, and manage relationships with students and other CUSTOMERS to

- acquire students and other CUSTOMERS and build market share;
- manage and enhance your image or brand;
- retain students and other CUSTOMERS, meet their requirements, and exceed their expectations in each stage of their relationship with you; and
- increase their ENGAGEMENT with you?

HOW do you leverage social media to manage and enhance your image or brand and to enhance student and other CUSTOMER ENGAGEMENT and students' and other CUSTOMERS' relationships with your organization, as appropriate?

(2) Complaint Management   HOW do you manage students' and other CUSTOMERS' complaints? HOW do you resolve complaints promptly and EFFECTIVELY? HOW does your management of these complaints enable you to recover your students' and other CUSTOMERS' confidence, enhance their satisfaction and ENGAGEMENT, and avoid similar complaints in the future?

Terms in SMALL CAPS are defined in the Glossary of Key Terms (pages 47–54).

Notes

3.2. Customer engagement refers to your students' and other customers' investment in or commitment to your organization and your educational program and service offerings. Characteristics of engaged students and other customers include retention, loyalty to your organization or brand, willingness to make an effort to obtain educational programs and services from you, and willingness to actively advocate for and recommend your organization and your program and service offerings.

3.2a. Educational program and service offerings are the activities you offer in the market to engage students in learning or contribute to scientific or scholarly investigation. In identifying educational program and service offerings, you should consider all their important characteristics and their performance in each stage of students' and other customers' relationship with you. The focus should be on features that affect students' and other customers' preference for and loyalty to you and your organization—for example, features that differentiate your programs and services from those of competing or other organizations. Those features might include curricular focus, student placement following completion of the educational goal or training objective, workforce composition, extracurricular activities, or tuition and associated costs. Key program and service features might also take into account how transactions occur and

factors such as the privacy and security of student and other customer data. Your results on performance relative to key educational program and service features should be reported in item 7.1, and those for students' and other customers' perceptions and actions (outcomes) should be reported in item 7.2.

3.2a(2). The goal of student and other customer support is to make your organization easy to receive educational programs and services from and responsive to your students' and other customers' expectations.

3.2b. Building relationships with students and other customers might include developing partnerships or alliances with them.

3.2b(1). Image or brand management is generally associated with marketing to improve the perceived value of your educational programs and services or brand. Successful image or brand management builds loyalty and positive associations on the part of students and other customers, and it protects your image or brand and intellectual property.

For additional guidance on this item, see the Category and Item Commentary (http://www.nist.gov/baldrige /publications/education_criteria.cfm).

Click here to access Education Curriculum

"Can schools increase graduation rates?"

" 2010 Baldrige recipient Montgomery County Public Schools had the highest graduation rate of any large school district in the nation in 2008 (89.1%) and 2009 (87.4%). The national average is 69%. "

The Education Peak Criteria provide a comprehensive way to achieve and sustain high performance across the entire organization. Education organizations such as business schools; community colleges; centuries-old universities; and K-12 school districts in Chicago, New York, North Carolina, and Oklahoma—as well as one covering 22,000 square miles in Alaska—use the Baldrige Criteria to improve their schools and their students' education. Your education organization can do the same.

How RMPEx Relates

The RMPEx Criteria address all key areas of a running a successful education organization and are compatible with other performance improvement initiatives, such as School Improvement Planning, ISO 9000, Lean, and Six Sigma. Using this framework, you can organize and integrate these approaches, improve productivity and effectiveness, and pursue performance excellence.

Improve Your Results

Whether your organization is a K-12 school or system, a community college, a university, or another type of education organization, the RMPEx Criteria are a valuable framework for measuring performance and planning in an uncertain environment. The Criteria help education organizations achieve and sustain the highest national levels of

- Student learning outcomes
- Customer satisfaction and engagement
- Product and service outcomes, and process efficiency
- Workforce satisfaction and engagement
- Budgetary, financial, and market results
- Social responsibility

See what the RMPEx Criteria can do for your organization and learn the value of the Baldrige process.

Strategic Organizational Transformation

Dr. Perich was one of the keynote speakers for our November 2011 Conference. As Consultant for Continuous Improvement at Montgomery County Public Schools, Dr. Perich lead the implementation of Malcolm Baldrige educational criteria for performance excellence. In 2010, Montgomery County Public Schools won the Baldrige award in education. Watch this inspiring video to learn how the school district improved test scores throughout the district and across demographic lines, and streamlined service for a significant increase in efficiency and cost reduction.

Resources

BALDRIGE in Education: Performance Excellence Delivers World-Class Results

Validating Key Results

Maybe you have heard about a failing school using a Baldrige assessment to begin its turnaround. But why would a school with good performance undertake a Baldrige self-assessment? To become better—and to get better results. In today's education environment of high-stakes academic testing and accountability to wide-ranging stakeholders, being results-focused is essential for schools. Education leaders who understand performance excellence know that school results must deliver ever-improving value to students and stakeholders, promoting education quality and organizational sustainability. The seven, comprehensive Categories of the Baldrige Education Criteria for Performance Excellence are designed to help education organizations capitalize on their unique strengths and identify their opportunities for improvement. When schools effectively develop and deploy strategies in each of the first six Baldrige Categories, they can expect these linked processes to drive better results.

The seventh Category of the Baldrige Education Criteria is called Results. This Category examines organizational performance and improvement in key outcome areas—student learning; student and stakeholder focus; budgetary, financial, and market; faculty and staff; organizational effectiveness; and leadership and social responsibility. Baldrige Award recipients have proven to be high-performing organizations that measure outcomes in all their key areas of performance and know where they stand on each relative to the outcomes of competitors and education industry leaders.

Aim High: Student Learning Outcomes

Baldrige Award recipients strive to design and deliver effective educational programs and activities that lead to strong learning results and educational improvement for all students.

• The Jenks Public Schools *(2005 Award Recipient in Education)* of Oklahoma have adopted a team-based learning approach that has resulted in multiple awards and recognition of students, faculty, and staff for academic achievements. Thirty-seven percent of the district's class of 2004 demonstrated college-level mastery by earning an Advanced Placement test score of three or better, compared to the national average of 13 percent and the highest state level of 21.2 percent. The district's high school graduation rate was 93 percent in 2003, 94 percent in 2004, and 95 percent in 2005. *For more information, contact Dana Ezell, Director of Communications, (918) 299-4415, ext. 2211, dana.ezell@jenksps.org.*

• Alaska's Chugach School District *(2001 Award Recipient in Education)* began a comprehensive restructuring effort in 1994 and progressed from a school district in crisis to one with student performance exceeding state and national norms. The district's results on the California Achievement Test rose dramatically—in reading, from the 28th percentile in 1995 to the 71st in 1999; in math, from 54th to 78th; in language arts, from 26th to 72nd. *For more information, contact Debbie Treece, Quality Schools Coordinator, (907) 522-7400, dtreece@chugachschools.com.*

Satisfy: Student-/Stakeholder-Focused Outcomes

Baldrige Award recipients demonstrate that they have satisfied students' and stakeholders' key needs and expectations and have encouraged loyalty, student persistence, and positive referrals.

• The Pearl River School District *(2001 Award Recipient in Education)* of Rockland County, New York, satisfies students and stakeholders through collaboration, including them as participants in annual reviews of the district's mission and goals. The district's overall student satisfaction, measured with a recognized national survey, increased from 70 percent in 1998 to 92 percent in 2001, surpassing the highest score in the survey's databank (86 percent in 2001). The district's overall parent satisfaction ratings increased from 62 percent in 1996 to 96 percent in 2001, also exceeding the highest score in the survey's databank (89 percent in 2001). *For more information, contact Sandra Cokeley, Director of Quality and Community Relations, (845) 620-3932, cokeleys@pearlriver.org.*

• The University of Wisconsin–Stout *(2001 Award Recipient in Education)* maintains productive, collaborative relationships with stakeholders, recognizing them as vital to the university's success in accomplishing its strategic goals. Five follow-up surveys to learn how employers view its graduates showed that 99 percent to 100 percent of respondents rated UW-Stout graduates as well prepared for their positions. In addition, more than 90 percent of graduate program alumni and almost 90 percent of under-graduate program alumni responded that, if they could do it all over again, they would choose to attend UW-Stout. *For more information, contact Julie Furst-Bowe, Provost and Vice Chancellor, (715) 232-2421, furst-bowej@uwstout.edu.*

Maintain Fiscal Stability: Budgetary, Financial, and Market Outcomes

Senior leaders are responsible for tracking organizations' budgetary, financial, and market results, assessing their use of resources and their market challenges and opportunities. Baldrige Award recipients show that they understand their organization's financial sustainability and market performance.

• The Community Consolidated School District 15 *(2003 Award Recipient)* of Palatine, Illinois, has developed innovative means of assessing its market performance: By calculating its cost of $111.93 per percentage point of student performance on state learning standards tests, the district determined that it outperformed three comparison districts, which ranged from $118.57 to $122.36. District 15 maintained a per-pupil expenditure rate at or below the levels of its comparison districts and the state average from 1995-1996 to 2001-2002. *For more information, contact Robert Tenczar, Director of Communications, (847) 963-3211, tenczarr@ccsd15.k12.il.us.*

• Kenneth W. Monfort College of Business (MCB) at the University of Northern Colorado *(2004 Award Recipient)* earns high marks for value, with 2003-2004 tuition and fees 39 percent lower than the national average, while student performance on nationally administered exit exams is in the top 10 percent. *For more information, contact Mike Leonard, Public Affairs, (970) 351-1273, michael.leonard@unco.edu.*

Know Your Strongest Assets: Faculty and Staff Outcomes

An organization that values its faculty and staff is committed to their satisfaction, development, and well-being. Baldrige Award recipients are focused on creating and maintaining a productive, learning-centered, and caring work environment for all faculty and staff.

• The Jenks school district motivates faculty and staff to develop their full potential by focusing on continuous improvement and recognizing excellent performance. Career and professional development opportunities include cohort degree programs offered with an accredited university. As a result, 48 percent of the teaching staff have master's degrees, and 98.5 percent are "highly qualified" according to the federal No Child Left Behind standards. For 2003 and 2004, the district's annual turnover rate for certified staff was 11 percent and 6 percent, respectively, compared to the national average rate of 20 percent both years.

• Despite high turnover among teachers and administrators in Alaska's rural communities, the Chugach School District has improved work situations and used incentives such as flexible scheduling and job rotation to reduce teacher turnover from an average annual rate of 55 percent from 1974 to 1994 to only 12 percent average annual turnover from 1995 to 2000.

Operate as a Leader: Organizational Effectiveness Outcomes

Baldrige Award recipients strive to achieve organizational effectiveness and process efficiency by developing and tracking key operational performance measures that are relevant and important to their organizations.

• In the Pearl River School District, the percentage of students graduating with a Regents diploma—a key objective for the district—increased from 60 percent in 1996 to 86 percent in 2001, only 4 percentage points below the state's top performer. By comparison, the percentage of students earning Regents diplomas in schools outside the district with similar socioeconomic profiles decreased from 61 percent in 1996 to 58 percent in 2000.

• At Richland College *(2005 Award Recipient)*, a community college in Dallas, the faculty's use of eCampus Blackboard technology—a tool which provides courses, discussions, assignments, and grades online—has risen from below 10 percent in 2001 to 37 percent in spring 2005, exceeding best-peer performance. *For more information, contact Jenni Gilmer, Manager of Public Information/Technological Communications, (972) 238-6022, jgilmer@dcccd.edu.*

Be a Role Model: Leadership and Social Responsibility Outcomes

Baldrige Award recipients' senior leaders understand the value of serving as role models and of reinforcing their organization's ethics, values, and expectations, with the aim of maintaining a fiscally sound, ethical organization that is a good citizen in its communities.

• In the Jenks Public Schools, service learning by students is considered part of preparing them to be productive, responsible citizens. Students are involved in numerous projects that help the community. The district also maintains an innovative partnership—recognized by *Education Week*, CNN, and *People* magazine—in which prekindergarten and kindergarten classes are held in a long-term care facility, benefiting students, teachers, and senior citizens in the community.

• Richland College's across-the-curriculum Service Learning program sends students to 68 community organizations as part of their "community-building" learning. Students contribute nearly 13,000 service hours annually to these organizations. Senior leaders, faculty, and staff serve on key civic and business boards and committees and give volunteer service hours to various charitable agencies serving the area.

Results with Baldrige in Education

(links are to organization profiles)

K–12

[Montgomery County Public Schools](#) (PDF)

- Half of Montgomery County Public Schools (MCPS) 2010 graduates received a college-ready score of 3 or higher on at least one Advanced Placement (AP) exam while in high school—twice the state rate and three times the national rate.
- The culturally diverse district achieved the highest graduation rate of any large school district in the nation in the two years leading to its Baldrige Award (2008 and 2009), as determined by an independent analysis of graduation rates by *Education Week*.
- MCPS narrowed the gap in student achievement between its African American and Caucasian students by 13 percentage points in the five years from 2006 to 2010.
- MCPS demonstrated parent satisfaction levels of 79.7 to 86.7 percent, compared to a national average of 54 percent, from 2005 to 2010.

[Iredell-Statesville Schools](#) (PDF)

- The district improved its academic composite ranking from 55th to 9th in North Carolina.
- The graduation rate increased from 61% to 81% (11th in the state).
- The average SAT score of 1056 in 2008 was better than the average score in peer districts (995), the state (1007), and the nation (1017).
- For reading, students achieved a 90.6% proficiency rate on the state assessment, the proficiency gap between African-American students and all students shrank from 23% to 12.3%, and the proficiency gap between exceptional students and all students shrank from 42% to 21%, all in 2006-2007.
- The district's dropout rate—previously one of the worst in the state—reached the top ten.

[Jenks Public Schools](#) (PDF)

- Turnover rates for teaching staff in 2003 and 2004 were 11% and 6%, respectively, compared to a national rate of 20% for both years.
- 37% of the class of 2004 earned an Advanced Placement (AP) test score of 3 or better, compared to 13% of students nationally and 21.2% in Oklahoma.
- Jenks ranked in the top 1% of schools in the state.
- Graduation rates were 93%, 94%, and 95%, respectively, for 2003–2005.

- The dropout rate fell from 6.3% in 1994 to 1.2% in 2004.

Community Consolidated School District 15 (PDF)

- In 2002-2003, 84% of second-grade students were reading at or above grade level, nearly 35 percentage points above the national average.
- Eighth graders' "enthusiasm for learning," a key performance target, increased from 42% to 82% for reading, 50% to 80% for math, and 42% to 82% for science from 2001-2002 to 2002-2003.
- The certified staff turnover rate was 11.7% in 2002-2003 against a national average of 20%.
- The district outperformed its three comparison districts in cost per percentage point of student performance on state learning standards tests.

Chugach School District

- Results on the California Achievement Test increased from the 28th to the 71st percentile in reading, from the 54th to the 78th in math, and from the 26th to the 72nd in language from 1995 to 1999.
- Chugach topped the state average in four subject areas tested in Alaska's High School Graduation Qualifying Examination.
- The district led the formation of the Alaska Quality Schools Coalition, and 12 U.S. school districts replicated the model.

Pearl River School District

- 100% of district students graduated from high school. The percentage of students graduating with a Regents diploma (a key objective) increased from 63% to 86%.
- Student satisfaction increased from 70% to 92% between 1998 and 2001; parent satisfaction increased from 62% to 96% between 1996 and 2001.
- Staff satisfaction was 98%, and faculty satisfaction was 96% in 2001.
- 75% of special education students took the SAT I exam, compared with 3% in the state and 2% nationwide.

Higher Education

Richland College (PDF)

- The employment rate for students taking technical training or workforce development classes reached nearly 100%.
- The number of students completing the core curriculum in preparation for transfer to four-year institutions grew from 500 in 2002 to 1,660 in 2005.
- For classes scheduled, class-time convenience, variety of courses, and intellectual growth—measures students rated as the most important—student satisfaction surpassed the Noel Levitz national norm over four years.
- The college found innovative ways to keep tuition rates low and quality high when state funding dropped from 70% to 30% over three legislative sessions.

[Kenneth W. Monfort College of Business](#) (PDF)

- Student performance on nationally administered exit exams was well above the national mean and reached the top 10% in 2003-2004.
- The college ranked in the top 10% nationally on 10 of 16 student satisfaction measures in a 2004 survey by Educational Benchmarking, Inc.
- 90% or more of the organizations employing students rated the program good or excellent.
- The college is one of just five undergraduate-only business schools in the nation accredited in business and accounting by the Association to Advance Collegiate Schools of Business.

[University of Wisconsin—Stout](#)

- From 1996 to 2001, the job placement rate for graduates was at or above 98%.
- 99% of employers surveyed rated graduates as well prepared.
- Approximately 90% of alumni said they would attend the university again.

You need to have Acrobat Reader installed on your computer to view the PDF file. If you do not have Acrobat Reader installed on your computer, download the program at http://get.adobe.com/reader. People with visual disabilities can download tools and information at http://www.adobe.com/accessibility to help make Adobe PDF files accessible.

High Plains Recognition

RMPEx offers five levels of award participation, designed to allow organizations to follow a process that sequentially builds to peak performance excellence.

This level is for organizations who are interested in beginning self-assessment and beginning a journey toward performance excellence. These organizations complete an organizational profile. The profile is a snapshot of the organization that describes its **operating environment**, **key relationships** with **customers**, **suppliers**, **partners**, and **stakeholders**, **competitive environment**, **key strategic challenges and advantages**, and **performance improvement systems**. All applicants who submit a High Plains application receive recognition during the annual RMPEx Quest award ceremony.

Foothills Performance Award

This level is for organizations who have not previously completed RMPEx/Baldrige assessments or have limited expertise or understanding of the linkages and alignment of the Baldrige criteria. The application includes information on the **organization's processes and systems**. At this level, fewer criteria questions are asked than for higher levels and only the applicant's **approach** is evaluated. Foothills awards are presented to those applicants that demonstrate systematic and mature approaches to the criteria questions.

Timberline Performance Award

This level is for organizations who have gained expertise in the RMPEx/Baldrige criteria and feel they are ready for a detailed discussion of their processes. The discussion includes information on approach, deployment, learning, and integration. At this level, the applicant addresses all process questions in a full application, except for those concerning results. Timberline awards are presented to those applicants who **demonstrate systematic and mature approaches**, **effective deployment**, **process learning**, and **process integration** in their response to criteria questions.

Peak Performance Award

This level is for organizations that have the expertise to apply for the National Baldrige Award. The RMPEx Peak Performance Criteria is identical to the Baldrige Criteria and includes questions on both processes and results. Results are stated in quantitative measures of key organizational metrics including trends and comparisons to best-in-class and leading competitor organizations. Organizations with strong internal performance excellence programs will receive the most benefit by selecting the Peak Performance level. Peak awards are presented to those applicants that **demonstrate role-model results**, plus **systematic and mature approaches**, **effective deployment**, **process learning**, and **process**

integration in their response to the criteria questions.

The Summit Award

Some organizations are not ready to launch a Baldrige journey, yet they are doing some fantastic work to design, manage and improve processes to achieve customer value and meet or exceed customer expectations. RMPEx is offering a new award we call the *Summit Award which will provide assessment and feedback on how to continuously improve these processes.*

JIM'S TWELVE
QUESTIONS

"Greatness is not a function of circumstance. Greatness, it turns out, is largely a matter of conscious choice, and discipline."

DEVELOPED BY

JIM COLLINS

Background on the Twelve Questions—A Note from Jim

In 1988, I had the great privilege to inherit teaching responsibility for a course on entrepreneurship and small business management at the Stanford Graduate School of Business. As I was preparing for my first year of teaching, I began to revise the syllabus for the course. The opening line of the syllabus read something like, "this will be a course on the mechanics and challenges of the entrepreneur and small business manager." For some reason, I impulsively changed the opening line to reframe the course around the question of what it would take to turn an entrepreneurial venture or small business *into an enduring great company*. I remember looking at that new opening sentence, and thinking to myself, "Wow, I don't know anything about that."

And thus began what would become a passionate quest—a quarter century of research, writing, and thinking about the question of what it takes to build an enduring great company or social sector enterprise. The result is more than 6,000 years of combined corporate history in a research database, six books, a range of articles, and a monograph translating some of the key ideas into the challenges faced by social sector leaders. These works included *Built to Last* (co-authored with Jerry Porras), *Great by Choice* (co-authored with Morten Hansen), *Beyond Entrepreneurship* (co-authored with Bill Lazier), *How the Mighty Fall*, and the cornerstone work *Good to Great*, along with its companion monograph *Good to Great and the Social Sectors*.

In 2012, I began to get a lot of questions from people who wanted to engage with the body of work, not just one book, so that they would have the best chance to build a great enterprise. The questions were along the lines of: "Where as a leadership team should we begin?" "Is there a best sequence to the reading, or to engaging with the concepts?" "What is the best way to challenge a team to engage with the full body of work?"

After reflecting on these questions, I decided to construct a sequence of Twelve Questions that would serve as a mechanism of disciplined thought for a leader and his or her team. The questions are designed to help you efficiently access the full body of work, in what I believe is a highly-effective sequence, along with readings corresponding to each question. I encourage you and your team to discuss one question per month, to fill out an entire year of disciplined thought. The most powerful results will come from repeating the cycle, rigorously hitting each question at least once per year. At the end of a year, you can further self-assess using the Good to Great® Diagnostic Tool, available at www.jimcollins.com.

Jim

The Good to Great Project LLC
Boulder, CO

What Defines "Great"

Before jumping into the Twelve Questions, let me first address the question: what is a great enterprise, be it a great company or a great social sector enterprise? Not how you build one, but what *is* a great organization—what are the criteria of greatness? There are three tests: *Superior Results*, *Distinctive Impact*, and *Lasting Endurance*.

Superior Results

In business, performance is defined by financial results—return on invested capital—and achievement of corporate purpose. In the social sectors, performance is defined by results and efficiency in delivering on the social mission. But whether business or social, you must achieve top-flight results. To use an analogy, if you are a sports team, you must win championships; if you don't find a way to win at your chosen game, you cannot be considered truly great.

Distinctive Impact

A truly great enterprise makes such a unique contribution to the communities it touches, and does its work with such unadulterated excellence that, if it were to disappear, it would leave a gaping hole that could not be easily filled by any other institution on the planet. If your organization went away, who would miss it, and why? This does not require being big; think of a small but fabulous local restaurant that would be terribly missed if it disappeared. Big does not equal great, and great does not equal big.

Lasting Endurance

A truly great organization prospers over a long period of time, beyond any great idea, market opportunity, technology cycle, or well-funded program. When clobbered by setbacks, it finds a way to bounce back stronger than before. A great enterprise transcends dependence on any single extraordinary leader; if your organization cannot be great without you, then it is not yet a truly great organization.

Finally, I caution against ever believing that your organization has achieved an end-state of greatness. To be built to last means embracing the idea that good to great is never done. No matter how far we have gone, or how much we have achieved, we are merely good relative to what we can do next. Greatness is an inherently dynamic process, not an end point. The moment you think of yourself as great, your slide toward mediocrity will have already begun.

Jim's Twelve Questions

1. Are we willing to strive for Level 5 Leadership, and to embrace the 10X behaviors needed to build a great company or social sector enterprise?

• Reading: *Good to Great,* Chapters 1, 2; *Great by Choice*, Chapters 1, 2; article at jimcollins.com: "Built to Flip"

• For leaders in the social sectors, first read: *Good to Great and the Social Sectors*

notes:

2. Do we practice the principle of First Who, with the Right People on the Bus and in the right seats?

• Reading: *Good to Great*, Chapter 3; *How the Mighty Fall*, Appendix 5

notes:

3. What are the Brutal Facts, and how can we better live the Stockdale Paradox?

• Reading: *Good to Great*, Chapter 4

notes:

4. What do we understand so far about our Hedgehog Concept—what we are fanatically passionate about, what we can (and cannot) be the best at, and what drives our economic or resource engine?

• Reading: *Good to Great*, Chapters 5, 6

notes:

5. How can we accelerate clicks on the Flywheel by committing to a 20 Mile March?

• Reading: *Good to Great*, Chapters 7, 8; *Great by Choice*, Chapter 3

notes:

6. Where should we place our big bets, based on the principle "Fire Bullets, then Cannonballs"—blending creativity and discipline to scale innovation?

• Reading: *Great by Choice*, Chapter 4

notes:

7.   Do we show any signs of *How the Mighty Fall*, and do we have enough Productive Paranoia to stay far above the Death Line?

• Reading: *How the Mighty Fall*; *Great by Choice*, Chapter 5

notes:

8.   How can we do a better job at Clock Building, not just Time Telling?

• Reading: *Built to Last*, Chapters 1, 2; article at jimcollins.com: "Aligning Action and Values"

notes:

9.   Do we passionately embrace the Genius of the AND—especially the fundamental dynamic of "Preserve the Core AND Stimulate Progress"?

• Reading: *Built to Last*, Interlude "No 'Tyranny of the OR' (Embrace the 'Genius of the AND')", Chapters 3, 4

notes:

10.   What is our BHAG – our Big Hairy Audacious Goal – and do we have the SMaC to achieve it?

• Reading: *Built to Last*, Chapter 5; *Good to Great*, Chapter 9; *Great by Choice*, Chapter 6
• For those in small business, also consider: *Beyond Entrepreneurship*, Chapters 2, 3, 5
• Useful tool at jimcollins.com: Vision Framework

notes:

11.   How can we increase our Return on Luck (ROL), making the most of our good luck and bad?

• Reading: *Great by Choice*, Chapter 7, Epilogue, FAQ

notes:

12.   What should be on our Stop Doing list?

• Reading: article at jimcollins.com: "Best New Year's Resolution? A 'Stop Doing' List"
• Useful tool at jimcollins.com: Good to Great® Diagnostic Tool

notes:

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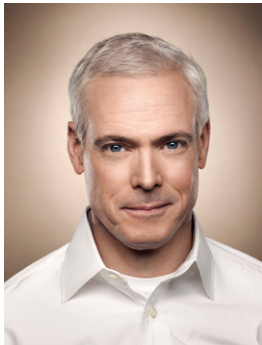
Jim Collins is a student and teacher of leadership and what makes great companies tick.

Having invested a quarter century of research into the topic, he has authored or co-authored six books that have sold in total more than ten million copies worldwide. They include: GOOD TO GREAT, the #1 bestseller, which examines why some companies and leaders make the leap to superior results, along with its companion work GOOD TO GREAT AND THE SOCIAL SECTORS; the enduring classic BUILT TO LAST, which explores how some leaders build companies that remain visionary for generations; HOW THE MIGHTY FALL, which delves into how once-great companies can self-destruct; and most recently, GREAT BY CHOICE, which is about thriving in chaos – why some do, and others don't – and the leadership behaviors needed in a world beset by turbulence, disruption, uncertainty, and dramatic change.

Driven by a relentless curiosity, Jim began his research and teaching career on the faculty at Stanford Graduate School of Business, where he received the Distinguished Teaching Award in 1992. In 1995, he founded a management laboratory in Boulder, Colorado, where he conducts research and engages in Socratic dialogue with CEOs and senior leadership teams. In addition to his work in the business sector, Jim has passion for learning and teaching in the social sectors, including education, healthcare, government, faith-based organizations, social ventures, and cause-driven non-profits. In 2012 and 2013, he had the honor to serve a two-year appointment as the Class of 1951 Chair for the Study of Leadership at the United States Military Academy at West Point.

Jim holds a bachelor's degree in mathematical sciences and an MBA from Stanford University, and honorary doctoral degrees from the University of Colorado and the Peter F. Drucker Graduate School of Management at Claremont Graduate University.

He is an avid rock climber, with one-day ascents of the north face of Half Dome and the 3,000 foot south face of El Capitan in Yosemite Valley.

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—Jim Collins

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FROM GOOD TO GREAT?

Good to Great® Diagnostic Tool

DEVELOPED BY JIM COLLINS

GOOD TO GREAT

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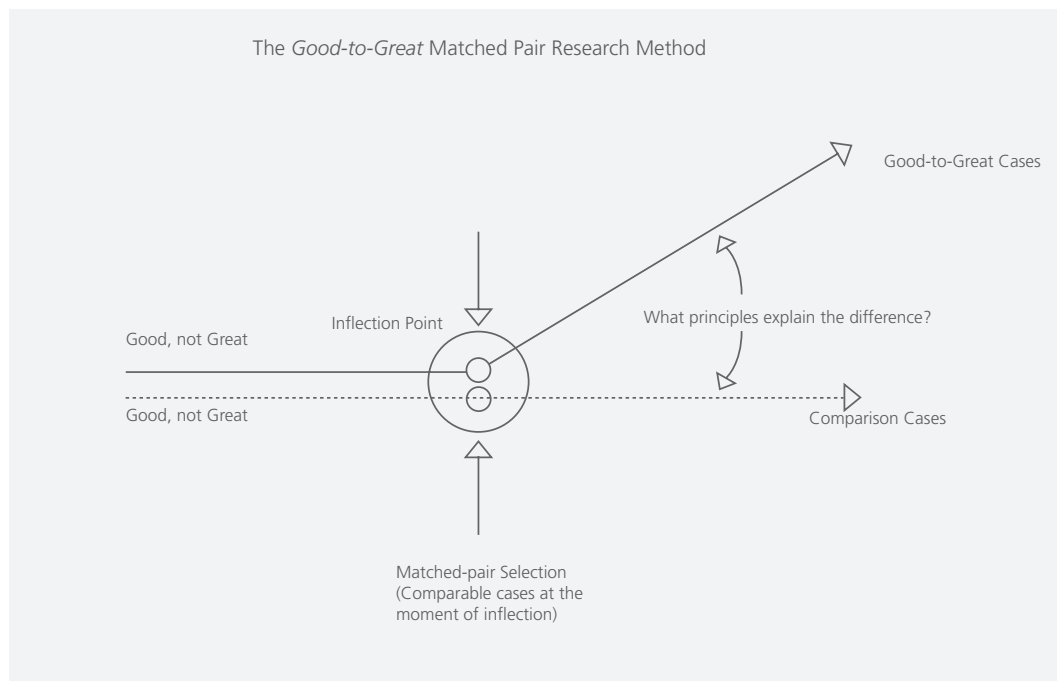
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A great organization is one that makes a distinctive impact and delivers superior performance over a long period of time. For a business, performance principally means financial results, specifically return on invested capital. For a social sector organization, on the other hand, performance must be assessed first and foremost relative to the organization's mission, not its financial results. Notice that by this definition that you do not need to be big to be great. Your distinctive impact can be on a local or small community, and your performance can be superior and long-lasting without becoming large. You might choose to grow in order to have a wider impact and to better deliver on your mission, but it is important to understand that big does not equal great, and great does not equal big.

We derived these principles from a matched-pair research method, wherein we systematically analyzed companies that attained greatness during a particular phase of their histories in contrast to carefully selected comparison companies— companies facing nearly identical circumstances—that failed to attain greatness during the exact same historical eras.

The *Good-to-Great* Matched Pair Research Method

Good-to-Great Cases

Inflection Point

What principles explain the difference?

Good, not Great

Good, not Great

Comparison Cases

Matched-pair Selection
(Comparable cases at the
moment of inflection)

The key is to recognize that the good-to-great principles are not a definition of greatness, but rather they represent a series of principles for how to achieve greatness; they are input variables, not output variables. The first step in your never-ending journey from good to great is to be clear on the two sides of the diagram below, rigorously implementing the left side of the page and rigorously assessing your results on the right side of the page.

BY APPLYING THE *GOOD TO GREAT*® FRAMEWORK YOU BUILD THE FOUNDATIONS OF A GREAT ORGANIZATION

INPUT PRINCIPLES*

Stage 1: DISCIPLINED PEOPLE

Level 5 Leadership
First Who, Then What

Stage 2: DISCIPLINED THOUGHT

Confront the Brutal Facts
The Hedgehog Concept

Stage 3: DISCIPLINED ACTION

Culture of Discipline
The Flywheel

Stage 4: BUILDING GREATNESS TO LAST**

Clock Building, not Time Telling
Preserve the Core / Stimulate Progress

OUTPUT RESULTS

Delivers Superior Performance
relative to its mission

Makes a Distinctive Impact
on the communities it touches

Achieves Lasting Endurance
beyond any leader, idea or setback

*   See a summary of the concept definitions on the next page for a brief definition of each concept.

** The principles in Stages 1-3 derive from research for the book *Good to Great* by Jim Collins; the principles in Stage 4 derive from the book *Built to Last* by Jim Collins and Jerry I. Porras.

Our research shows that building a great organization proceeds in four basic stages; each stage consists of two fundamental principles:

STAGE 1: DISCIPLINED PEOPLE

Level 5 Leadership. Level 5 leaders are ambitious first and foremost for the cause, the organization, the work—not themselves—and they have the fierce resolve to do whatever it takes to make good on that ambition. A Level 5 leader displays a paradoxical blend of personal humility and professional will.

First Who … Then What. Those who build great organizations make sure they have the right people on the bus, the wrong people off the bus, and the right people in the key seats before they figure out where to drive the bus. They always think first about "who" and then about what.

STAGE 2: DISCIPLINED THOUGHT

Confront the Brutal Facts—the Stockdale Paradox. Retain unwavering faith that you can and will prevail in the end, regardless of the difficulties, AND AT THE SAME TIME have the discipline to confront the most brutal facts of your current reality, whatever they might be.

The Hedgehog Concept. Greatness comes about by a series of good decisions consistent with a simple, coherent concept—a "Hedgehog Concept." The Hedgehog Concept is an operating model that reflects understanding of three intersecting circles: what you can be the best in the world at, what you are deeply passionate about, and what best drives your economic or resource engine.

STAGE 3: DISCIPLINED ACTION

Culture of Discipline. Disciplined people who engage in disciplined thought and who take disciplined action—operating with freedom within a framework of responsibilities—this is the cornerstone of a culture that creates greatness. In a culture of discipline, people do not have "jobs;" they have responsibilities.

The Flywheel. In building greatness, there is no single defining action, no grand program, no one killer innovation, no solitary lucky break, no miracle moment. Rather, the process resembles relentlessly pushing a giant heavy flywheel in one direction, turn upon turn, building momentum until a point of breakthrough, and beyond.

STAGE 4: BUILDING GREATNESS TO LAST

Clock Building, Not Time Telling. Build an organization that can adapt through multiple generations of leaders; the exact opposite of being built around a single great leader, great idea or specific program. Build catalytic mechanisms to stimulate progress, rather than acting as a charismatic force of personality to drive progress.

Preserve the Core and Stimulate Progress. Adherence to core values combined with a willingness to challenge and change everything except those core values—keeping clear the distinction between "what we stand for" (which should never change) and "how we do things" (which should never stop changing). Great companies have a purpose—a reason for being—that goes far beyond just making money, and they translate this purpose into BHAGs (Big Hairy Audacious Goals) to stimulate progress.

Individual Worksheets

Good to Great® Diagnostic Tool
Developed by Jim Collins

LEVEL 5 LEADERSHIP

Level 5 Leadership has two primary components:
1) Put Level 5 leaders in the most powerful seats.
2) Create a Level 5 leadership culture.

Grade Range:

A = We exemplify this trait exceptionally well—there is limited room for improvement.
B = We often exemplify this trait, but we also have room for improvement.
C = We show some evidence of this trait, but our record is spotty.
D = There is little evidence that we exemplify this trait, and we have obvious contradictions.
F = We operate almost entirely contrary to this trait.

Level 5 Leadership—Diagnostic, Part 1: *Put Level 5 leaders in the most powerful seats.*	Grade: (A, B, C, D, F)
The leaders who sit in the most powerful seats in our organization are ambitious first and foremost for the cause, the organization, the work—not themselves—and they have an iron will to do whatever it takes to make good on that ambition.	
The leaders who sit in the most powerful seats in our organization display an ever-improving track record of making Level 5 decisions—decisions that prove best for the long-term greatness of the company and its work.	
The leaders who sit in the most powerful seats in our organization practice the window and the mirror. They point out the window to people and factors other than themselves to give credit for success. When confronted with failures, they look in the mirror and say, "I am responsible."	
While some members of the leadership team might be charismatic, this is not the primary source of their effectiveness. They inspire others primarily via inspired standards—excellence, hard work, sacrifice, and integrity—not with an inspiring public persona.	

Level 5 Leadership—Diagnostic, Part 2: *Create a Level 5 leadership culture.*	Grade: (A, B, C, D, F)
Our culture values substance over style, integrity over personality, and results over intentions.	
Members of our leadership team dialogue and debate in search of the best answer (not for the sake of looking smart or winning a point) up until the point of decision.	
Once a decision is made, members of the team unify behind the decision to ensure success—even those who disagreed with the decision.	
We cultivate leaders who have all five levels in the Level 5 hierarchy, as laid out in *Good to Great*: highly capable individuals, strong contributing team members, competent managers, effective leaders, and Level 5 executives.	

First Who has four primary components:

1) Get the right people on the bus.

2) Get the right people in the right seats.

3) Get the wrong people off the bus.

4) Put who before what.

Grade Range:

A = We exemplify this trait exceptionally well—there is limited room for improvement.

B = We often exemplify this trait, but we also have room for improvement.

C = We show some evidence of this trait, but our record is spotty.

D = There is little evidence that we exemplify this trait, and we have obvious contradictions.

F = We operate almost entirely contrary to this trait.

First Who—Diagnostic, Part 1: *Get the right people on the bus.*	Grade: (A, B, C, D, F)
We are rigorous in our selection process for getting new people on the bus.	
We invest substantial time in evaluating each candidate, making systematic use of at least three evaluation devices, e.g., interviews, references, examination of background, meeting members of the family, testing.	
When in doubt, we do not bring the person on the bus; we have the discipline to let a seat go unfilled—taking on extra work as needed—until we have found the right person. If we are in a "tenure" system, we do not grant tenure unless we are 100% certain the individual is an exceptional permanent member.	
We do an exceptional job of retaining the right people on the bus; we perpetuate our good decisions for a very long time.	

First Who—Diagnostic, Part 2: *Get the right people in the right seats.*	Grade: (A, B, C, D, F)
We have 100% of the key seats on the bus filled with the right people. This doesn't mean 100% of ALL seats have the right people, but 100% of the key seats. (Note: this will likely provoke discussion as to what are the key seats.)	
When we think we have a potential "wrong who," we first give the person the benefit of the doubt that perhaps we have just put him or her in the wrong seat.	
Whenever possible, we give a person the chance to prove himself or herself in a different seat, before we draw the conclusion that he or she is a wrong person on the bus.	

First Who—Diagnostic, Part 3: *Get the wrong people off the bus.*	Grade: (A, B, C, D, F)
When we know we need to make a people change—after we have given the individual full opportunity to demonstrate that he or she might be the right person—we deal with the issue.	
When we correct a people selection mistake, we are rigorous in the decision, but not ruthless in the implementation. We help people exit with dignity and grace so that, later, the vast majority of people who have left our bus have positive feelings about our organization.	
We autopsy our hiring mistakes, applying the lessons systematically to future hiring decisions.	

First Who—Diagnostic, Part 4: *Put who before what.*	Grade: (A, B, C, D, F)
When confronted with any problem or opportunity, our natural habit is to translate the decision from a "what" question ("what should we do?") into a "who" decision ("who would be the right person to take responsibility for this?").	
A significant portion of our time is spent in one form or another with people decisions: getting the right people on the bus, getting the right people in the right seats, getting the wrong people off the bus, developing people into bigger seats, planning for succession, etc.	
We have a disciplined, systematic process for improving our success at getting the right people on the bus.	
With each passing year, the percentage of people decisions that turn out good versus bad continues to rise.	

Confront the Brutal Facts has three primary components:
1) Create a climate where the truth is heard.
2) Get the data.
3) Embrace the Stockdale Paradox.

Grade Range:
A = We exemplify this trait exceptionally well—there is limited room for improvement.
B = We often exemplify this trait, but we also have room for improvement.
C = We show some evidence of this trait, but our record is spotty.
D = There is little evidence that we exemplify this trait, and we have obvious contradictions.
F = We operate almost entirely contrary to this trait.

Confront the Brutal Facts, Part 1: *Create a climate where the truth is heard.*	Grade: (A, B, C, D, F)
When things go wrong, we conduct "autopsies without blame"—we seek to understand underlying root causes, rather than pin the blame on an individual.	
Our leaders ask a lot of questions, rather than just making statements, thereby creating a climate of vibrant dialogue and debate about the brutal facts.	
Our leaders do not allow their charisma or force of personality to inhibit people from bringing forth the brutal facts—even if those brutal facts run contrary to the views held by those leaders.	
People in our culture are never penalized for bringing forth the brutal facts.	

Confront the Brutal Facts, Part 2: *Get the data.*	Grade: (A, B, C, D, F)
We make excellent use of data, metrics and hard tangible evidence to assess external threats and internal weakness.	
We make particularly good use of trend lines (to see where we are declining) and comparative statistics (to see where we are falling behind others) to discover and highlight brutal facts.	
When people advance a point of view or make an argument, we expect them to marshal evidence, facts, and rigorous thinking to back up their argument. "It is my opinion" does not qualify as an acceptable argument.	
When someone has a gut instinct that "something is just wrong," we pay attention; instincts can be good early warning systems. But we don't just stop there: we then conduct a disciplined, fact-based assessment of the situation.	

Confront the Brutal Facts, Part 3: *Embrace the Stockdale Paradox.*	Grade: (A, B, C, D, F)
When facing difficult times, we never hold out false hopes soon to be swept away by events.	
We are not unrealistic optimists who die of a broken heart when our belief that "it will be better tomorrow" gets continually shattered on the rocks of reality.	
Despite whatever brutal facts we face, we have an unwavering faith that we can and will prevail in the end.	
We believe that greatness is not primarily a function of circumstance; it is a first and foremost a function of conscious choice—and discipline. It is up to us.	

The Hedgehog Concept has three primary components:
1) Keep it simple—be a hedgehog, not a fox.
2) Get your three circles right.
3) Act with understanding, not bravado.

Grade Range:
A = We exemplify this trait exceptionally well—there is limited room for improvement.
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F = We operate almost entirely contrary to this trait.

The Hedgehog Concept, Part 1: _Keep it simple—be a hedgehog, not a fox._	Grade: (A, B, C, D, F)
If forced to choose between describing us as foxes (crafty creatures that know many things) or hedgehogs (simpler creatures that know one big thing), we would weigh in with the hedgehogs. We keep it simple.	
We have a simple, coherent strategic concept that we pursue with relentless consistency.	
If we have multiple options for how to accomplish an objective, we almost always pick the simplest option that will work. In other words, at each fork of the road, we tend toward the path of simplicity, rather than complexity.	

The Hedgehog Concept, Part 2: _Get your three circles right._	Grade: (A, B, C, D, F)
Our Hedgehog Concept reflects deep understanding of the three circles: 1) what we can be passionate about, 2) what we can be the best in world at, and 3) what best drives our economic or resource engine.	
We understand that nothing great can be accomplished without passion, and we limit our primary arenas of activity to those for which we have great passion.	
We know what we can be the best in the world at. While "best in the world" might be local or highly-focused, e.g., "best in the world at breaking the cycle of homelessness in Indiana" or "best in the world at providing financial services to people in Des Moines," it nonetheless captures what we can do better than any other institution on the planet.	
We understand what best drives our economic or resource engine. If we are a for-profit business, we have identified our one economic denominator—profit per X—that has the most significant impact on our economics. If we are a social sector organization, we know how best to improve our total resource engine, so that we can spend less time worrying about money and more time fulfilling our mission.	

The Hedgehog Concept, Part 3: *Act with understanding, not bravado.*	Grade: (A, B, C, D, F)
We believe that great results come about by a series of good decisions—actions taken with understanding, not bravado—accumulated one on top of another, in line with our Hedgehog Concept.	
We believe that a great organization that sticks to its Hedgehog will, in the words of David Packard, "have indigestion of too much opportunity," rather than starvation for too little.	
We confront the brutal facts of what we can—and equally cannot—become the best in the world at, and we do not allow bravado to obscure the truth.	

A CULTURE OF DISCIPLINE

A Culture of Discipline has four primary components:
1) Focus on your Hedgehog.
2) Build a system of freedom and responsibility within a framework.
3) Manage the system, not the people.
4) Practice extreme commitment.

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Culture of Discipline, Part 1: *Focus on your Hedgehog.*	Grade: (A, B, C, D, F)
We have the discipline to say "No thank you" to big opportunities that do not fit within our Hedgehog Concept. A "once-in-a-lifetime opportunity" is irrelevant if it is the wrong opportunity.	
We never lurch after growth for growth's sake; we grow consistently within our Hedgehog, period.	
We are willing to jettison our core competencies and largest lines of business if we cannot be the best in the world at them.	
We make excellent use of "Stop Doing" lists.	

Culture of Discipline, Part 2: *Build a system of freedom and responsibility within a framework.*	Grade: (A, B, C, D, F)
A cornerstone of our culture is the idea of freedom and responsibility within a framework: so long as people stay within the wide bounds of the framework, they have an immense amount of freedom to innovate, achieve and contribute.	
People in our system understand that they do not have "jobs"—they have responsibilities—and they grasp the distinction between just doing assigned tasks and taking full responsibility for the results of their efforts.	
We can answer the question for each significant activity, "Who is the one person responsible?"	
Our culture is a productive blend of dualities, such as: freedom and responsibility, discipline and entrepreneurship, rigor and creativity, financial control and innovative spirit, focused Hedgehog and adaptable. We see no contradictions in cultural duality; we exemplify the "Genius of the And."	

Culture of Discipline, Part 3: *Manage the system, not the people.*	Grade: (A, B, C, D, F)
We do not spend a lot of time motivating our people; we recruit self-motivated people, and provide an environment that does not de-motivate them.	
We do not spend a lot of time disciplining our people; we recruit self-disciplined people, and then manage the system, not the people.	
We avoid bureaucracy that imposes unnecessary rules on self-motivated and self-disciplined people; if we have the right people, they don't need a lot of rules.	

Culture of Discipline, Part 4: *Practice extreme commitment.*	Grade: (A, B, C, D, F)
In our culture, people go to extremes to fulfill their commitments and deliver results, bordering at times on fanaticism.	
Words like "disciplined," "rigorous," "dogged," "determined," "diligent," "precise," "systematic," "methodical," "workmanlike," "demanding," "consistent," "focused," "accountable," and "responsible" describe us well.	
We are equally disciplined in good times as in bad times. We never allow prosperity to make us complacent.	

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The Flywheel has four primary components:
1) Build cumulative momentum.
2) Be relentlessly consistent over time.
3) Create alignment by results, not hoopla.
4) Avoid the Doom Loop.

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The Flywheel, Part 1: *Build cumulative momentum.*	Grade: (A, B, C, D, F)
We understand that building greatness never happens in one fell swoop—that there is no single defining action, no one killer innovation, no seminal acquisition, no breakthrough technology, no savior on a white horse, no wrenching revolution that can by itself bring about sustained greatness.	
We build greatness by a cumulative process—step by step, action by action, day by day, week by week, year by year—turn by turn of the flywheel.	
While some pushes on the flywheel are bigger than others, no single push by itself accounts for the majority of our momentum; we understand that it requires hundreds of additional pushes to turn any big decision into a successful decision.	

The Flywheel, Part 2: *Be relentlessly consistent over time.*	Grade: (A, B, C, D, F)
When examining our behavior, one word that comes to mind is consistency—consistency of purpose, consistency of values, consistency of Hedgehog, consistency of high standards, consistency of people, and so forth.	
Our success derives from a whole bunch of interlocking pieces that reinforce one another, consistently applied over a long period of time.	
We have immense flexibility and we adapt well to change—but always within the context of a coherent Hedgehog Concept.	

The Flywheel, Part 3: *Create alignment by results, not hoopla.*	Grade: (A, B, C, D, F)
We tend to undersell ourselves, and then delightfully surprise by blowing people away with our actual results.	
We never pump up our reputation with a sales job ("buy into our future") to compensate for lack of results.	
We do not "sell visions" to fire people up or take a programmatic or hoopla-laden approach to alignment.	
We understand that when people begin to feel the magic of momentum—when they feel the flywheel increase speed—is when most people line up to throw their shoulders against the wheel and push.	

The Flywheel, Part 4: *Avoid the Doom Loop.*	Grade: (A, B, C, D, F)
We do not succumb to the lazy, undisciplined search for a single silver bullet solution—be it a new program, a motivational event, a sexy technology, a big acquisition, or a savior CEO.	
We do not build from 0 to 100 rotations in the flywheel, then stop, lurch in a new direction, lose our momentum and start anew. We have the discipline to turn the flywheel from 0 to 100, 100 to a thousand, a thousand to a million, a million to a billion turns—and to not go 0 to 100, 0 to 100, 0 to 100, lurching from new program to new program.	
If a new technology advances our Hedgehog, we become a pioneer in its application; if a new technology does not fit, we don't worry too much about it—and we certainly don't lurch about in fearful frantic reaction.	
When we look at the Flywheel versus the Doom Loop side-by-side table on pages 183-184 in chapter 8 of *Good to Great*, we are characterized much more by the flywheel side of the ledger than the doom loop side.	

PRESERVE THE CORE / STIMULATE PROGRESS

Preserve the Core/Stimulate Progress has four primary components:

1) Articulate a core guiding philosophy—core values and a reason for being that goes beyond just making money.
2) Change and improve everything except your core values.
3) Create a passionate culture that preserves the core and stimulates progress.
4) Achieve BHAGs—big hairy audacious goals.

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Preserve the Core / Stimulate Progress, Part 1: *Articulate a core guiding philosophy—core values and a reason for being that goes beyond just making money.*	Grade: (A, B, C, D, F)
We have a passionately-held set of core values that we adhere to, no matter how much the world changes around us.	
We are honest about what our core values actually are. We don't worry about what outsiders think of our values; they are for internal guidance, not marketing.	
If these core values were to become a competitive disadvantage at some point in the future, we would still hold them.	
We have an enduring purpose or mission—a reason for being—that that goes beyond just making money.	

Preserve the Core / Stimulate Progress, Part 2: *Change and improve everything except your core values.*	Grade: (A, B, C, D, F)
We practice the "Genius of the And"—continuity and change, values and results, cohesion and autonomy, endurance and urgency, and so forth.	
We are clear on the difference between our core values (which should never change) as distinct from our operating practices, cultural norms, goals, strategies, and tactics (which should remain open for change).	
While we hold our core values constant, we stimulate progress—change, improvement, innovation, and renewal—in the operating practices, cultural norms, goals, strategies and tactics that surround the core values.	
We understand that if our list of core values is too long, we are very likely confusing core values with practices and aspirations; we have no more than six values that we consider to be truly core.	

Preserve the Core / Stimulate Progress, Part 3: *Create a passionate culture that preserves the core and stimulates progress.*	Grade: (A, B, C, D, F)
We have built a culture that so consistently reinforces our core values that those who do not share the values are ejected like a virus, or they become so uncomfortable that they self-eject.	
We promote leaders who live the core values; those who repeatedly breach our values never make it far or last long in our culture.	
We are so consistent with our values that if every conversation, every decision, every action were videotaped, people watching the tape would be astounded by our consistency and passion for living to our values.	
No matter how much we achieve, we never feel comfortable or feel that we've arrived. We're obsessively focused on our shortcomings—on what we could do better; the term "productively neurotic" describes our culture well.	

Preserve the Core / Stimulate Progress, Part 4: *Achieve BHAGs—big hairy audacious goals.*	Grade: (A, B, C, D, F)
We have a remarkable success rate at achieving our BHAGs (big hairy audacious goals); we rarely fall short of the extreme standards of achievement we set for ourselves.	
We understand the difference between a 10-to-25 year BHAG—which is like a huge mountain to climb—and 5-year intermediate objectives, which are like base camps on the way to the top of the mountain.	
We have a 10-to-25 year BHAG in place, which we have broken down into base-camp objectives.	
Our BHAGs are set with understanding, not bravado—in direct alignment with the three circles of the Hedgehog Concept.	

CLOCK-BUILDING, NOT TIME TELLING

Clock-building has three primary components:
1) Build a system that can be great beyond any single leader or great idea.
2) Create catalytic mechanisms.
3) Manage for the quarter century.

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Clock-building, Part 1: *Build a system that can be great beyond any single leader or great idea.*	Grade: (A, B, C, D, F)
Our chief leader is a clock-builder, not just a time teller—he or she is building a system that can prosper beyond his or her presence.	
Our chief leader is building a great team of strong individuals, rather than acting as a "genius with 1000 helpers" on whom everything depends.	
If any individual leader were to disappear tomorrow, our discipline would remain as strong as ever; we have built a culture of discipline, as distinct from having a larger-than-life disciplinarian at the helm.	
We hold our leaders accountable for the success of their successors.	

Clock-building, Part 2: *Create catalytic mechanisms.*	Grade: (A, B, C, D, F)
We have red flag mechanisms that bring brutal facts to our attention, and force us to confront those facts, no matter how uncomfortable.	
We set in place powerful mechanisms that stimulate progress—mechanisms designed to force us to continually improve.	
Our mechanisms are designed so that people who hold power—and who might want to ignore the brutal facts—cannot easily subvert the mechanisms.	
We have a mechanism analogous to "the council" as described in chapter 5 of *Good to Great*, which plays a key role in guiding our decisions.	

Clock-building, Part 3: *Manage for the quarter century.*	Grade: (A, B, C, D, F)
No matter what short term pressures we face—Wall Street, financial distress, No Child Left Behind, pressure for a winning season—we build for long-term greatness; we manage not for the quarter, but for the quarter century.	
Our leaders measure their own success as much by how their organization performs in the hands of a successor as by how it fares during their own personal reign.	

OUTPUT VARIABLES: HOW GREAT IS YOUR COMPANY?

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Delivers Superior Performance:	Grade: (A, B, C, D, F)
In business, performance is defined by financial returns and achievement of corporate purpose. In the social sectors, performance is defined by results and efficiency in delivering on the social mission.	

Makes a Distinctive Impact:	Grade: (A, B, C, D, F)
The organization makes such a unique contribution to the communities it touches and does its work with such unadulterated excellence that if it were to disappear, it would leave a hole that could not easily be filled by any other institution on the planet.	

Achieves Lasting Endurance:	Grade: (A, B, C, D, F)
The organization can deliver exceptional results over a long period of time, beyond any single leader, great idea, market cycle, or well-funded program. When hit with setbacks, it bounces back even stronger than before.	

Now, assess the trajectory of your organization on each component, using the following scoring scheme:

-2: We have declined dramatically on this component in the last three years.
-1: We have declined gradually on this component in the last three years.
 0: We have held steady on this component in the last three years.
+1: We have improved gradually on this component in the last three years.
+2: We have improved dramatically on this component in the last three years.

INPUT PRINCIPLES

Level 5 Leadership

Trend Score: _____

First Who, Then What

Trend Score: _____

Confront the Brutal Facts

Trend Score: _____

Hedgehog Concept

Trend Score: _____

Culture of Discipline

Trend Score: _____

Flywheel, Not Doom Loop

Trend Score: _____

Preserve the Core / Stimulate Progress

Trend Score: _____

Clock-Building, Not Time Telling

Trend Score: _____

OUTPUT RESULTS

Delivers Exceptional Performance

Trend Score: _____

Makes a Distinctive Impact

Trend Score: _____

Achieves Lasting Endurance

Trend Score: _____

WHAT MAKES GREAT COMPANIES TICK™

The Good to Great Project LLC
P.O. Box 1699 Boulder, CO 80306

Gain a deeper understanding of the ideas presented in the books "Built to Last" and "Good to Great" by using these discussion guide questions.

Level 5 Leadership

Which is harder to cultivate within yourself: humility or will?

If Level 5 is about ambition first and foremost about the cause, the company, the work—not yourself—combined with the will to make good on that ambition, then how can each of us as individuals learn to take actions consistent with being Level 5?

Think of a Level 5 you have known. How did he or she become Level 5? What can we learn from that person?

Why do so few Level 5s get chosen for top spots in our organizations? What can be done to change this?

First Who

How might you tell if someone is the right person on the bus?

How might you tell if someone is simply in the wrong seat as distinct from being the wrong person on the bus entirely?

Think of a case where you had doubts, but your organization hired anyway. What was the outcome? Why did the organization hire anyway, and what do you learn from the situation?

If compensation is not the primary driver for the right people on the bus, then what are the primary elements in getting and keeping the right people on the bus? What role does compensation play?

Confront the Brutal Facts

Which side of the Stockdale Paradox is harder for you: unwavering faith or confront the brutal facts? Why?

Think of two environments that you have been in. The first being an environment that did not confront the brutal facts and where people (and the truth) were not heard. The second being an environment that did confront the brutal facts and where people had a tremendous opportunity to be heard. What accounts for the difference between the two environments? What does the contrast teach about how to construct an environment where the truth is heard?

Do you have any red flag mechanisms in your life or organization? What ideas do you have for new ones?

In leading a team, what is your questions to statements ratio?

Hedgehog Concept (the Three Circles)

How long, on average, did it take the good-to-great companies to clarify their hedgehog concepts? What implications does this have about finding your own hedgehog concept?

Are you engaged in work that fits your own three circles: what you are passionate about, what you are genetically encoded for, what you can get paid for? Do you need to change? Which circle is hardest to get right? Why?

Which is more important for an organization: the goal to be the best at something, or realistic understanding of what you can (and cannot) be the best at?

Can each sub-unit and each person have a hedgehog concept?

How is the hedgehog concept different for a nonprofit organization?

Culture of Discipline

If "rinsing your cottage cheese" is important, how do you tell *which* cottage cheese is worth rinsing? In other words, if diligent attention to detail is essential, how do we decide which details are important, and which are trivial?

Think of two people: One being someone who only sees his or her job as a "job" and the other who understands that he or she has a responsibility. How does this difference play itself out in their work? What should we look for in locating such people?

If class distinctions are deeply divisive, then why do organizations persist in creating an executive class that separates itself from those who do the real work? If you ran the whole show, what would you remove to reduce these class distinctions?

Do you have stop doing list? What do you put on your stop doing list?

Technology Accelerators

If technology cannot make or break a company's level of greatness, but only serves as an accelerator of greatness or demise already in progress, then why did everyone fall in love with technology for technology's sake during the 1990s?

Why is there so much hype and fear about new technologies, and what can you do to view new technologies with objective equanimity?

Flywheel

Think of two organizations you've observed: one that followed the flywheel principle, and the other that fell into the Doom Loop. What caused the difference between the two? What does your contrast teach about why do so many organizations fall into the Doom Loop, rather than building momentum over the long term in the flywheel?

How do you know when it is time to change the direction of the flywheel?

If big change programs with lots of hoopla, tag lines, launch events, motivational meetings—and so forth—do not lead to greatness, then why are such programs so common? What should be done instead of these programs?

How can the flywheel concept apply to your own life and career?

Preserve the Core / Stimulate Progress

What are your core values?

What is your core purpose, beyond just making money?

What is your BHAG—big hairy audacious goal?

What is your first five-year base camp, on the way to achieving the BHAG?

What practices and strategies does your organization have that are dysfunctional and should be open for change?