

QUALIFICATIONS AND READINESS OF SCHOOL BOARD
TRUSTEES AND IMPLICATIONS
FOR TRAINING

by

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A dissertation submitted in partial fulfillment
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of

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in

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April 2007

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*“At times our own light goes out and is rekindled by a spark from another person.
Each of us has cause to think with deep gratitude of those
who have lighted the flame within us.”
Albert Schweitzer*

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DEDICATION

*“You don't choose your family. They are God's gift to you, as you are to them.”
Desmond Tutu*

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ABSTRACT

Researchers have studied the need for public school board training and relationship of in-service to effective boardsmanship and school leadership. Research about training for trustees indicates that training can enhance board effectiveness, but little is known about board members' predisposition to training. While there is research-based consensus about training needs for school board members, little is known about trustees' predisposition and how that temperament impacts in-service. This research contributes to the body of knowledge by exploring these topics with selected participants.

There is a lack of research-based knowledge about perceptions regarding training and development for Montana public school board trustees. The purpose of this research was to gather data from Montana public school trustees and superintendents regarding perceptions of training for school board members. Preferred methods of delivery for training and development, as well as who should be the primary instructor for training school board trustees was also examined. Utilizing Key Work for School Boards as the standard for knowledge and performance for school trustees and working through a learning model framework entitled the Learning Stages Model that characterizes dispositions towards training, this research provides data about the continuum of learning for school board trustees. In addition to assisting superintendents and school boards, this research educates and informs advocacy groups, professional associations, universities, and the public regarding training and development for school trustees.

Trustees in the study generally judged themselves ill-prepared to serve and believed that being a parent was their best prior preparation for school board service. Trustees in the study looked to the board chair versus the superintendent to provide training. Trustee and superintendent participants preferred locally developed and delivered training in part because of time constraints. While training was perceived to be important, most trustees did not progress through a learning continuum of incompetent to competent. Overall, even though trustees were deficient in the skill and knowledge standards developed by the National School Boards Association, they were not seeking training to become proficient to be able to fully understand the job they have been elected to do.

“A popular government without popular information or the means of acquiring it is but a prologue to a farce or a tragedy, or perhaps both. Knowledge will forever govern ignorance; and a people who mean to be their own governors must arm themselves with the power which knowledge gives.”

James Madison

CHAPTER ONE

INTRODUCTION

Background and Need for the Study

In a time of intense scrutiny and high expectations for educational reform, the public school board's role is evolving rapidly and significantly. Although the charge to this governing body is generally described as providing oversight to public schools, the job description has been vague and subject to broad interpretation in the two-hundred-year existence of school boards (Frase, English, & Poston, 2001). The role of school boards in Montana, as defined in law, is detailed in Montana Code Annotated (MCA) § 20-3-324 (Appendix A). Powers and duties of Montana school boards range from critical tasks such as hiring and firing school personnel and adopting and administering multi-million dollar annual budgets to trivial tasks, such as ensuring that American flags, measuring twelve inches by eighteen inches, are prominently displayed in each classroom in the district. The assortment of duties expected of elected laypersons is extensive, yet instructions for accomplishing these tasks are ambiguous (Campbell & Green, 1994).

The demand for public education reform would best be led by school boards, according to McAdams (2002), who believes that mandates for accountability are coupled with demands for effective school governance. McAdams asserts that school

board members equipped with increased knowledge and skills regarding roles and responsibilities will best be able to reform school districts with increased knowledge and skills (2002). Coeyman (2000) and Chaddock (2002) concur regarding the need for capable board members. Their research indicates that some communities are so concerned about ability—or lack thereof—of board members to be policy and reform leaders that these communities are, whenever possible, selecting, rather than electing, trustees in the hope that appointments may garner members already possessing needed skills to achieve greater accountability and to improve public education. The writing and research of both Coeyman and Chaddock supports ongoing training and development for school board members (2000, 2002). Snyder & Snyder (2001) echo concerns of these researchers and state:

American education has been unique in the world because of its system of local educational control, featuring elected laypersons serving the key role of school board members... Many are leaders of one sort or another, but few have ever had training that is especially relevant to the complex, demanding leadership roles they occupy on a school board. (p. 227)

Challenges facing boards of education are many and require constant attention. Board service is rarely what candidates expected. Most new trustees report being surprised at the amount of time board service requires, the variety of topics that come before the board, and the abrupt change from citizen to trustee with little or no transition or training (Loozen, 1982).

In 2005-2006, there were 439 school districts in Montana and 840 schools within those districts. Fifty-two districts were elementary districts, 104 were combined districts with combined boards, 170 were single districts (165 elementary and 5 high school), and

nine were state-funded or non-operating, annexed districts. The 840 schools were comprised of 451 elementary schools, 217 middle schools and junior highs, and 172 high schools. Six percent of schools serve more than 500 students, eighteen percent serve 100-499 students, and fifty-six percent serve fewer than 100 students. A total of 145,416 students were enrolled in public schools in Montana in 2005-2006 (“Facts about Montana Education,” 2006). In 2006-2007, there are 325 school districts with 830 schools serving 144,418 students (“Montana Public School Enrollment Data,” 2006).

There are approximately 1,583 trustees in Montana. Of that total amount, 1,383 are from smaller districts while 200 serve larger districts (L. Gowen, personal communication, January 19, 2007). School boards across Montana make policy decisions, analyze and monitor budgets, approve personnel decisions, and decide numerous other matters brought before them by district administration, by the public, or by their colleagues. These decisions impact local schools and may have an impact on districts across Montana. Local control, i.e., governance by citizens who represent the community, is demonstrated as elected officials make policy decisions that oftentimes long outlast their board tenure. Under the theory of local control and reflecting community values, the influence of school boards should be representative of constituencies served. According to Houston and Shannon (1994), school boards’ actions and decision-making processes should make the following statement: “This is what our school district is about, and this is how we measure its success” (p. 34).

As much training is done on-the-job, new board members are often unaware of the comprehensive duties of a trustee. If trustees rely on others to fully inform them

instead of seeking information themselves, they can be oblivious to the comprehensive role of school board members. Whether elected or appointed, the learning curve for new board members is steep. Understanding community cultures and public expectations, complex financial schema, curricular issues, personnel policies, and a plethora of operating procedures is daunting for most new trustees. School districts have varied procedures for acclimating and acculturating new board members, including but not limited to, a mentoring relationship with a more experienced trustee, training from the superintendent and/or other administrators, training from the state school board association, or informal coaching offered by educators and the local teachers' association. Meanwhile, other school districts have no acclimation procedures at all. (Danzberger, 1994; Glass, 2000; Griffin, 2005; St. John, 1970).

Effective boardsmanship should include peer training (Jones, 1996). Whether formalized or spontaneous, veteran trustees can help indoctrinate new members. This training and development should provide background information on current issues before the board, as well as district policies and parliamentary procedure (Keating, 1996).

State school board associations support training and development for trustees. The Montana School Boards Association (MTSBA) website offers the following definition for the work of school boards:

Local school boards exemplify American principles of representative democracy. MTSBA supports the concept of strong local control of school districts as established by the Montana Constitution. Acting with primary concern for the education of students and being accountable to the public, school boards are community decision-making agencies for public schools. (Training, n.d., p. 13)

MTSBA provides training and development opportunities for Montana trustees at statewide conferences, through online delivery, and with workshops developed for the specialized needs of individual school districts. Topics include, but are not limited to, board roles and responsibilities, meeting procedures, school law, employment practices, school funding, budgets, and the purpose and foundation of public education. Of approximately 1,583 school board members in Montana, between 250 and 350 trustees typically attend the Montana Conference of Education Leadership (MCEL) to receive training from MTSBA (L. Gowen, personal communication, January 19, 2007). Training, supporting, and educating Montana school board members is at the center of the mission of MTSBA. The organization's website declares, "The core purpose of the Montana School Boards Association is to foster excellence in public education through school board leadership" (Core purpose, n.d. p. 1).

In addition to resources of the local school district and the state association, the National School Boards Association (NSBA) provides opportunities for school board members (Shannon, 1994). These training opportunities are described on the NSBA website:

To support NSBA's mission, the association provides several opportunities for training and development through its annual events, online courses, publications, and other services. The annual events provide training opportunities for school board members and members of their district staff, focusing on five key areas: leadership, advocacy, technology, urban school issues, and school law. (Mission, n.d., p. 1)

Through the NSBA website, trustees can keep abreast of current issues and recent educational research. In concert with state associations, NSBA advocates for public

education on a national level and provides opportunities for training for school board members.

Despite available opportunities for trustees to receive instruction, there is no mandate for Montana school board members to obtain any training or development. Often, responsibility for educating trustees falls to the school superintendent and district administrative team. Orientation and training for school board members is not a legal requirement in Montana as it is in several other states. Analyzing data collected from superintendents and trustees in Montana about the need for training and predisposition of trustees to receive that training will provide an important foundation for understanding training and development for public school boards in Montana and may provide data for decision-making about ongoing training for school trustees.

Statement of the Problem

Although several state legislatures have enacted laws pertaining to the mandatory training of school board trustees, the majority of states do not require any training for prospective or new school board members (Calvert, 2004; Ficklen, 1985). While each state with required training has mandated training and development courses that are unique to its needs, overall individual purposes are very similar to the description found on the Texas Education Association website, which states, “The purpose of this training requirement is to prepare school board members to work as a corporate body to govern and oversee the management of their school district so that academic performance of all students will improve” (Alanis, 1998. p. 1).

With exception of provisions for single member districts, any qualified Montana elector is eligible for the office of trustee (MCA § 20-3-305). In addition to a district residency requirement, credentials to be a qualified elector are as follows:

- (1) No person may be entitled to vote at elections unless he (sic) has the following qualifications:
 - (a) He must be registered as required by law.
 - (b) He must be 18 years of age or older.
 - (c) He must be a resident of the state of Montana and of the county in which he offers to vote for at least 30 days.
 - (d) He must be a citizen of the United States.
- (2) No person convicted of a felony has the right to vote while he is serving a sentence in a penal institution.
- (3) No person adjudicated to be of unsound mind has the right to vote, unless he has been restored to capacity as provided by law. (MCA § 13-1-111)

There is no requirement for training in order to assume or retain this elected position. Calvert says, “A trained board is a better board...Unfortunately, few boards make board development a priority” (2004, p. 39). There is a lack of research-based knowledge about perceptions of trustees and superintendents regarding training and development for Montana public school board trustees. In addition, there is a scarcity of evidence regarding preferences as to who should deliver training and development or how that training should be delivered. Also, there is a lack of research regarding the perception about education for trustees in Montana as expressed by trustees and superintendents and how that sentiment impacts training and development for school board members.

The Purpose of the Study

The purpose of this research was to gather data from Montana public school trustees and superintendents regarding perceptions of training and development for school board members. Preferred methods of delivery for training and development, as well as who should be the primary instructor for training school board trustees was also examined. Working through the Conscious Competence Model, a learning framework that describes dispositions towards training, this research provided data about the continuum of learning for school board trustees. Utilizing Key Work for School Boards as the standard about school board knowledge and performance, trustees were queried about their knowledge in these eight focus areas to help determine their proficiency in these standards and to determine their disposition toward training and placement on the Conscious Competence Matrix. In addition to assisting superintendents and school boards in making trustee training decisions, this research educated and helped inform advocacy groups, professional associations, universities, and the public regarding training and development for school board members.

Research Questions

The questions guiding this research were:

- (1) What perceptions do school board trustees have about personal and professional characteristics and experiences needed for school board service?
- (2) Are there differences between the perceptions of trustees and superintendents regarding knowledge and qualifications needed for board service?

- (3) What are school board trustees' predispositions toward training and development?
- (4) How do attitudes toward learning impact training and development for school board trustees?
- (5) From whom do trustees believe they should receive their training and development?
- (6) What are preferred delivery methods for training and development for school board trustees?

These guiding questions, as addressed in this study, informed interested person(s) or group(s) about perceptions regarding training and development for trustees. Trustees' predispositions to learning and possible impact on training and development were also explored through this research. Delivery methods and the person(s) or group(s) responsible for the delivery of training was also explored.

Significance of the Study

School boards have been and will likely continue to be part of the landscape of public education. The role of school boards is defined in state law and is enacted through local control. A poll conducted by Phi Delta Kappa and Gallup indicates that sixty-one percent of respondents believe that decisions made by local school boards are more important than similar decisions by state or federal governments (Rose & Gallup, 2003). The influence of elected laypersons on public education is significant, and this study clarified perceptions about continuing education for public school trustees and the

importance of trustees' attitudes towards training and development. Training assists school board members in their roles as policy makers for public schools. Understanding board members' predispositions towards training and development provided grounded theory research about training and development, especially as those attitudes are considered in context of a theoretical learning framework.

In an atmosphere of increased accountability, school board members find themselves in challenging and complex situations which require policy decisions on issues ranging from curriculum to facilities, food service to transportation, safety to sports, from the macro-view of a multi-million dollar budget to the micro-view of individual personnel decisions. Many board members are daunted by the tasks. Fewer people are willing to volunteer for board service because of "increasing demands on school boards to stronger accountability measures for schools and students" (Chmelynski, 2003. p. 7). In a survey commissioned by NSBA, Frederick Hess reported that 43.7% of school board members plan to run for office again (2002). Lack of willingness to run for trustee positions creates turnover on school boards and can contribute to chaos. Even with planned training and orientation, new board trustees will need six to twelve months on the job before functioning effectively and contributing to the whole. Few school districts can afford this much time for board members to acclimate themselves (Funk & Funk, 1992).

In an age of increased federal and state regulation, elevated standards, and rigorous accountability, new board members can be overwhelmed. Training can dramatically reduce time necessary to bring a newcomer up to speed (Morehouse, 2001).

Advances in technology can facilitate trustee instruction and can provide improved board professionalism and teamwork through continuing education (Bianchi, 2003).

Through the lens of national performance and knowledge standards developed by the National School Boards Association, this study assessed skills and knowledge of trustee participants regarding their roles and responsibilities. Responses assisted in placing trustees on the Conscious Competence Matrix developed by Dr. Thomas Gordon. Assessing skills and knowledge as well as predispositions to training has potential to assist in planning trustee training and development.

The significance of this study was to analyze Montana school board trustees' and superintendents' perceptions about trustee training. This research also assessed preferences about delivery methods and person(s) or group(s) who should deliver that training. In addition, this study provided information about stages of learning that board members move through or can become stalled in, and how those stages impact training and development. This study informed institutions of higher learning that engage in administrative education and assisted local school districts and state and national organizations that participate in board development and training by providing research-based information on these topics.

Theoretical Framework

Researchers have studied the need for board training and relationship of that training and development to effective boardsmanship. Research about continuing education for trustees indicates that specific training can enhance board effectiveness (Calvert, 2004; Comstock, 1984; Jones, 1973; Johnson, 1990; Kirst, 1994, 1994a;

McAdams, 2002; Petronis, Hall, & Pierson, 1996), but little is known about board members' predisposition to learning.

Working with parents and teachers, Dr. Thomas Gordon and associates at the Gordon Training Organization developed a theory of learning known as the Learning Stages Model. Also described as the Conscious Competence Matrix, this prototype was developed in the early 1970's and was utilized in Teacher Effectiveness Training (TET) ("Teacher Effectiveness Training," 2005) and Parent Effectiveness Training (PET) ("Parent Effectiveness Training," 2005). The Learning Stages Model or Conscious Competence Matrix illustrates the stages of learning a new skill or developing a new behavior, technique, or ability. The learner begins at stage one and passes through four stages, moving towards skill or knowledge proficiency, but the learner can stall at any one of four stages and can even regress to a previous stage ("Conscious Competence Model," 2003).

Stage one is known as Unconscious Incompetence. In this stage, the learner's awareness of skill and/or knowledge deficiency is low or non-existent, and the learner does not appreciate the need for training and development. Instructors must create an awareness of the need for training in order to move the learner to the second stage of learning, which is entitled Conscious Incompetence. In this second stage of learning, the student recognizes skill or knowledge deficiency and is interested in acquiring training. Although requiring concentration and practice, the learner can demonstrate competence with the new skill or knowledge in the third stage, entitled Conscious Competence. In the fourth stage, the skill becomes second nature to the learner. This stage is referred to as

Unconscious Competence. It is in this stage that the student can become the teacher/trainer of other students.

While learners can regress in this matrix, moving through stages one through four to develop proficiency in a new skill or knowledge set is desirable to achieve mastery. Many trainers make the mistake of assuming that new learners are in stage two when they are, in reality, firmly entrenched in stage one – Unconscious Incompetence—and do not even recognize or acknowledge a need for training. The developer of this learning theory contends that people can only respond to training when they are fully aware of their need for continuing education and the personal benefit that they will derive from receiving training (Conscious competence learning model, 2003).

Corporate trainers, sports coaches, health care educators, life coaches, counselors and even ballroom dance teachers have all utilized the Learning Stages Model. They have determined that knowing where trainees are situated in the learning model assists the trainer in motivating as well as educating learners. This learning framework, developed by psychologist Dr. Thomas Gordon over thirty years ago, is the roadmap to learning new skills, learning a new language, managing people, or moving through any continuum of growth and development. White belt, green belt, brown belt, black belt; novice, apprentice, journeyman, master; mail room clerk, general manager, vice president, CEO—all of these can be steps in achieving success in personal or professional growth (Kopschinsky, 2006; Jourdain, 2003; Loo, 2005; Murray, 2005; Salicru, n.d.; Redmond, 2006; Young, 2003). Although there is no evidence that this learning model has been applied to training and development of school board trustees, the concepts in this learning

matrix can be applied to the training progression for a school board trustee just as they have been to many professions, avocations, hobbies, life skills, volunteer work, and other knowledge and skill sets.

Key Work of School Boards

The National School Boards Association has developed a training tool entitled The Key Work of School Boards. This training guide describes strategic work of school boards as providing leadership for student achievement through community involvement. Utilizing a continuum of important themes and related tasks, NSBA describes crucial steps in providing leadership for increased student achievement and provides resources and assessments about a continuous focus for school boards. The eight areas of foci are vision, standards, assessment, accountability, alignment, climate, collaboration, and continuous improvement.

The *Key Work Guidebook* offers trustees both generalized goals and specific actions to support student achievement while involving community constituents in the process. The guidebook and accompanying activities help trustees to focus on engaging community members to improve student achievement. “The key work of school boards—student achievement and community engagement to promote student achievement—is becoming recognized nationally as the primary agenda for boards of education” (Gemberling, Smith, & Villani, 2000, p.1). In a cycle of continual improvement, the board focuses on eight areas to ensure that resources are aligned to achieve the goals of increased accountability, collaborative environment, and high standards. In addition, Key Work offers specific roles for the board and superintendent and helps to distinguish

between the work of the board and the work of the superintendent. This project is the standard for the work of school boards and will be the benchmark by which school board knowledge and proficiency are measured (Key Work, 2001).

Definition of Terms

For purposes of this study, the following terms are defined:

- *Board Member:* Member of a Board of Education; Also referred to as School Board Trustee or Trustee.
- *Continuing Education:* Courses or training designed to update individuals with latest developments in their particular field (Encarta Dictionary). Also referred to as in-service training or training and development.
- *Finance or Funding:* Revenues and Expenditures.
- *Key Work of School Boards:* A project of the National School Boards Association that provides a synopsis of the work of school boards focused on student achievement through community involvement.
- *Learning:* Acquiring knowledge or skill.
- *Montana School Boards Association (MTSBA):* A member organization that provides advocacy, legislative and lobbying support as well as training, legal assistance and publications for Montana member school districts.
- *National School Boards Association (NSBA):* The national advocacy voice for state school board associations in educational policy and research as well as

lobbying efforts on behalf of public education. This organization also provides training opportunities for school board members.

- *Novice School Board Member:* For purposes of this study, a board member who has served less than three years (one full term).
- *Parent Effectiveness Training (PET):* A program that offers parents specific communication and conflict resolutions skills to build and maintain an effective relationship with a child, in any and all circumstances. This model gives parents the opportunity to become experts themselves in dealing with inevitable problems that surface in all parent-child relationships (Parent Effectiveness Training, 2005).
- *School Board:* A group of people elected or appointed in each county or local school district in the United States to make decisions about education in public schools. Also called board of trustees (Encarta Dictionary).
- *School District:* Administrative area of public schools; a number of public schools that are administered together (Encarta Dictionary).
 - *Large Districts:* For purposes of this study, large districts include Class A and Class AA districts. Classifications are designated by the Montana High School Association. Class AA schools have enrollments of 900+ students. Class A schools have enrollments of 370-899 students (By-laws, n.d., p. 37).
 - *Small Districts:* For purposes of this study, small districts include Class B, Class C and Elementary Districts. Classifications are

designated by the Montana High School Association. Class B schools have enrollments of 130-369 students and class C schools have enrollments of 1-129 students (By-laws, n.d., p. 37). Elementary school districts are K-8 districts.

- *Superintendent*: An administrator of a school system (Encarta Dictionary).
- *Teacher Effectiveness Training (TET)*: This system offers teachers essential communication and conflict resolution skills needed for high quality relationships with students so there will be less conflict and more teaching and learning time (Teacher Effectiveness Training, 2005).
- *Training*: Acquiring of skill; process of teaching or learning a skill or job (Encarta Dictionary). Also called in-service training, training and development, and/or continuing education. This training can be experiential, self-taught, or imparted from others.
- *Training and development*: Courses or training designed to update individuals with latest developments in their particular field (Encarta Dictionary). Also referred to as in-service training or continuing education.
- *Training delivery methods*: Examples include:
 - Face to face instruction at conferences and association meetings
 - Individualized instruction designed for individual school boards
 - Internet-based instructional delivery
 - Instruction through Interactive Television (ITV)

- Written instructions provided through handbooks and informational pamphlets
- Mentoring
- *Veteran School Board Member*: For purposes of this study, a veteran board member is one who has served at least three years (one full term).

Limitations and Delimitations

This study was delimited by the following three factors and limited by one:

1. This study was delimited to perceptions of school board members and superintendents in Montana who were interviewed for this study.
2. Because of the first delimitation, results can be generalized only to those who participated and may not be generalized beyond that population which is a delimitation of the study. While some general themes and patterns were identified within the group studied, their global application to other boards of education or individual trustees could not be verified by this study.
3. Information that was self-reported may be subject to error and bias, possibly limiting internal validity, causing another possible delimitation of the study.
4. Observations and data gathered and analyzed are subject to the skill and positionality of the researcher and created a limitation of the study. Utilizing data gathered through an interview technique created limitations based on the credibility of those being interviewed as well.

Organization of the Study

This dissertation is organized into five chapters. Chapter 1 includes an introduction, background and need for the study, statement of the problem, purpose of the study, research questions, significance of the study, theoretical framework, operational definitions, limitations and delimitations, organization of the research, and positionality of the researcher. Chapter 2 is a review of related literature outlining relevant issues associated with the history of school boards, roles and responsibilities of trustees, importance of training and development, Key Work of School Boards, school board training, and a learning model or matrix called Learning Stages Model. Methodology including participant information, instrumentation, an overview of data collection, and analysis procedures are described in Chapter 3. Chapter 4 presents the summary of data relating to research questions in this study. Data collected and related to each research question are compiled in this chapter. Chapter 5 reports the researcher's summary, conclusions, implications, and recommendations for further study.

Researcher's Positionality

The researcher's interest in this topic stems in part from nine years of service as a school board trustee in Montana. This experience frames the study and provides both background and bias. Acknowledging this positionality helps to guard against a threat to reliability while recognizing that this previous experience provides enthusiasm and passion for the research and results.

Summary

Beliefs and perceptions of Montana trustees regarding preparation for school board service are unknown. In addition, there is a void in the research about Montana trustees' perceptions toward training and development and if those dispositions impact training as well as expectations about who should be responsible for training and how those continuing education opportunities should be delivered. Utilizing Key Work for School Boards as the recognized standard for what school boards should know and do, trustees and superintendents were questioned about their proficiency and knowledge in these eight areas and from their responses, trustees were placed on the matrix developed in the Conscious Incompetence Model. This research examined those issues in a qualitative study with twelve trustees and three superintendents in Montana.

“If I have seen farther than others, it is because I stood on the shoulders of giants.”
Isaac Newton

CHAPTER 2

REVIEW OF LITERATURE

Introduction

Much of the literature reviewed for this study expressed support for training of school trustees, although there was little consensus about delivery models, who should deliver training and how, or if, trustees’ attitudes impact training and development. Although school boards have been in existence for more than two hundred years, the role of the board is still evolving, and there is no clear blueprint for training and development. The purpose of this chapter is to present a review of selected research and literature on these topics. This examination of research-based literature will concentrate on the historical framework of school boards, roles and responsibilities assigned to those boards; importance of trustee training, Key Work of School Boards, and a learning theory entitled Learning Stages Model.

The bulk of literature related to school boards has been conducted by doctoral students working on their dissertations. Foster (1975) estimates that “doctoral dissertations make up the bulk of the over four hundred empirical studies of school boards and board member behavior and social characteristics” (p. 73).

Historical Framework of School Boards

“Lay responsibility for public education is a cherished American tradition” (Carol, Cunningham, Danzberger, Kirst, McCloud, & Usdan, 1986, p. 14). This principle began with the 1642 Massachusetts School Ordinance. The school board had its earliest development during colonial times when early schools were “administered, maintained and controlled by citizens through town meetings” (Goldhammer, 1964, p. 2). The 1671 and 1683 amendments to the 1642 Ordinance further reinforced lay control of public education and became the model for colonial regulation and financial support of schools. The 1677 Plymouth Colony Law mandated that fishing industry profits support public education. Citing the importance of an educated citizenry, selectmen in colonial America became accountable for schools until the task became so large that a board of education committee was formed (Campbell & Green, 1990; Goldhammer, 1964).

Gradually, colonization spread from urban areas to rural areas and the need for separate districts became apparent. Conflict between urban and rural communities about civil and religious doctrine created the first de-centralization of public education, and the role of boards of education to administer local school districts was formed (Goldhammer, 1964). As responsibility grew, necessity for a school superintendent became apparent. The first superintendent of public education was appointed in Buffalo, New York on June 9, 1837. This job was initially clerical but later became an educational role. Boards of education often chose to employ a superintendent for business, sometimes referred to as the clerk, as well as a superintendent for education. This decision frequently led to a dual

administrative organization – an executive for business and an executive for education, both reporting directly to the board (Campbell et al., 1990).

Development of American public education and local control through lay school boards reflects the public's interest to keep education close to local communities. "The fundamental reason; therefore, for the existence of local school boards is to make the will of the people instrumental in the governance of education" (Dykes, 1965, p. 4). Schools are responsive to the public will because of school boards. The local school board is the community's voice and judgment in educational affairs (Callahan, 1966).

The Roles and Responsibilities of School Boards

In 1791, when the Bill of Rights was ratified, the Tenth Amendment to the Constitution of the United States specified that, "The powers not delegated to the United States by the Constitution, nor prohibited by it to the States, are reserved to the States respectively, or to the people" (Article X, Amendments to the Constitution). The U.S. Constitution does not specifically address the issue of education; therefore, public education is a state responsibility.

A board of education is a legal entity created by the state legislature to perform duties assigned by that legislative body. This responsibility is delegated to the board as a whole and individuals have little power (Wiles & Bondi, 1985). The school board is a policy-making body, not an executive arm of the school district. Oftentimes interpretation of the board's role is in conflict with the superintendent's responsibility. While serving as Director of the National School Boards Association, Thomas Shannon said that board members are constantly seeking clarification of their part in governance and

administration of schools because of changing demands from the public. “With today’s school board member, is it really possible to pin down the role of the school board member with textbook accuracy? I think not...” (Shannon, 1982, p. 4). Koerner (1968) suggests that “the post of the school board member is perhaps the most ill-defined in local government” (p. 122).

School boards have many duties and responsibilities including oversight and policy-making; employment, supervision, and appraisal of the superintendent; representation of the public constituency; public relations; and financial accountability. An integral part of American society, school boards represent the responsibility of the community to be involved with governance of public schools (Poston, 1994; Rebore, 1984; Selby, 1984). The Institute of Educational Leadership (IEL) study of 1986 states:

The score of a board’s responsibilities, except in its legal terms, seems to defy definition and structure and is planted with unexpected landmines. Board members are politicians. Constituents (personal, system, other political bodies) are major forces in defining the job and the priorities – and frequently contribute to the crisis. (p. 21)

In a landscape of ever changing scenery, the public school trustee’s role is constantly being formed and re-formed by legislative actions, collective bargaining implications, court decisions, increased public scrutiny, and expectations for reform. The changing societal expectations for public education commingled with the changing lives of today’s students creates a job that is difficult, uncertain, arduous, perplexing, and sometimes thankless for most volunteers in this important governmental position in our communities (Selby, 1984; Poston, 1994; Rebore, 1984).

The Importance of In-service Training for School Boards

It is important that we place emphasis where it can do the most good—on providing appropriate in-service and pre-service training for board members and administrators. With knowledge comes ability; with ability comes better decision-making. With better decisions comes self-confidence. With self-confidence comes reduced stress and efficient and effective use of time and manpower. And, with all these things comes better education for our children—our future. Anything less will eventually lead to disaster for public education. This country cannot survive without good, free, public education. (Van Voorhees, 1980, p. 6)

The importance of training was reiterated in much of the literature reviewed regarding school boards. Whether mandated or voluntary, the literature supports the value of training and development for public school trustees (Baghat, 1993; St. John, 1971; Huston, 1989; Institute for Educational Leadership (IEL), 1993; Jones, 1973; Kerr, 1964; Koerner, 1968; Kleinstiver, 1986). Everett and Sloan reviewed literature on the subject of board training in 1984 and concluded that there was a need for two types of carefully planned instruction: an orientation program for new board members followed immediately by a systematic, comprehensive, sophisticated, and continuous in-service education for all members of the board (1984).

Serving on a school board can be a difficult and complex task, for which many trustees are inadequately prepared (Tuttle, 1963; IEL, 1986; Jones, 1973). Boards need ongoing training and development to understand the complex educational issues that they face. Oftentimes, the new trustee is thrust into a complex situation which requires listening to varied viewpoints, sorting out demands from inside and outside of the organization and making important decisions for which most are ill-prepared (Campbell & Green, 1994; Foster, 1975). In a 1973 study, Jones recommends formalized training for

board members, which would be delivered by state and national organizations to assist these public school policy-makers. Jones describes the situation facing many novice school board members:

Give a new army recruit a welcoming slap on his back, a handbook of regulations and a weapon, drop him into front line action and you have a warrior ill-prepared to serve his country; give a newly elected school board member the customary welcoming slap on the back, hand him the board's policy manual, a copy of school district regulations and perhaps copies of minutes from past board meetings, and more often than not, you have a board member ill-prepared to serve his community. (1973, pp. 22-23)

New trustees are expected to be fully functioning immediately after election. For the most part, this is unrealistic unless board members receive ongoing training. Only as board members begin to use their newly acquired authority do needs for training and development become apparent to them. Today in some communities, particularly where board members are chosen by electoral districts and viewed as representatives of specific constituencies, there is little if any time to learn. They are thrust into action, often in turbulent environments, and begin making decisions immediately. Beyond knowledge about school finance, contract administration, teacher tenure and the like, school board members must understand how to make decisions wisely in a group situation, particularly one which is so public. Conviction is growing that board members need to be part of a continuous program of education and development. The majority of literature reviewed advocates comprehensive training programs for new board members. Informed and effective participants are needed to effectuate local control of public schools and perpetuate constant reform and continuous improvement of public education. Much of the literature reviewed also emphasized that school board orientation and training is in need

of serious revision and reconsideration (Everett & Sloan, 1984; Campbell & Cunningham, 1990; Funk & Funk, 1992; Kerrins, 1984; Stuckey, 1988).

School Board Training

Many new board members have orientation opportunities through state school boards associations, state education departments, or their own local districts. Taking advantage of these opportunities remains the prerogative of individual members. Many researchers agree that orientation is a crucial component of board training and that veteran trustees can play a significant role in mentoring novice trustees. Further, because of diversity of membership as well as diversity of issues before the board, researchers agree that board training is of paramount importance to school boards and the districts they serve (Campbell & Cunningham, 1990; Funk & Funk, 1992).

Successful school reform depends on effective board decision-making. School board members all over the country may already receive instruction – voluntary and/or mandated – but most of this training is content specific (Huston, 1989). Content knowledge is definitely needed; but in addition, in order for content knowledge to be used wisely, group process skills such as meeting management, conflict resolutions, and consensus building are crucial to be included in training (Hess, 2004; Houston & Bryant, 1997; McAdams, 2003; McAdams, 2004; McReynolds, 1997).

Roles and responsibilities of school board members were the primary needs for training according to many of the research studies. This issue was found to be the most important according to both trustees and superintendents (Anderson, 1990; Anderson,

1991; Birch, 1981; Helton, 1991; Hess, 2002; Houston & Bryant, 1997; Kask, 1990; Kerrins, 1984; Kleinstiver, 1986; Shannon, 1985; Stuckey, 1988; White, 2004). In 1984, Kerrins studied training needs of school board members and found that both trustees and superintendents found board training regarding roles and responsibilities to be one of the most pressing issues facing them. This issue was universal in doctoral research of school boards in Colorado, regardless of rural or urban trustees or gender or income differences or years of service on a school board. Odel Stuckey (1988) replicated Kerrins' study and concluded that South Carolina board members agree that training is needed in performing trustee roles. Reexamining the same issues in 1990, Kask found that Ohio board members perceived board member roles and responsibility as the greatest need for trustee training.

Local sessions utilizing discussions with the superintendent and other board members were the most popular delivery methods in literature reviewed. Many authors contend that this delivery of training is best done at the local level with the board president and superintendent providing material (Amundson, 1981; Anderson, 1992; Cooper & Brown, 1954; Cryer, 1975; Francois, 1970; Helton, 1991; Kerrins, 1990; St. John, 1970). Stuckey found that board members wanted to be trained locally, also. Local training sessions led by local board members, superintendents, the South Carolina School Boards Association, and State Department of Education were preferred (1988).

Regarding delivery methods preferred by Ohio school board members, the preferred method of training, based on total sample response, was discussion with the superintendent; however, discussion with other board members, and tours of district facilities were also noted as important. This could imply that Ohio board members

preferred local training. One may also infer that board members preferred training activities that were district-specific, based on unique, individual needs (Kask, 1990).

“If one thing stands clear from the data collected, it is in connection with training as a regular part of regular board meetings!...We believe some training should and does occur at every school board meeting” (Everett & Sloan, 1984, p.6).

Everett and Sloan (1984) recommend orientation and training for new board members and that there be policies developed concerning training and development. Davies (1989) supports policy development and further suggests that these policies include specific activities, approval procedures, acceptable reimbursements, and that district budgets reflect funds available for school board development. Steere (1975) recommends the following training content areas: school finance, buildings and equipment, policies, curriculum and instruction, and school policies. Jones (1973) suggests that in-service training be offered in school and community relations, business management, district facilities, administration and teaching, and curriculum and instruction.

“Times have changed and the type of leadership that brings results needs to change” (Calabrese, 2002, p. 1). As the role of school boards are evolving, training on implementing and supporting that change may be necessary for educational leadership. In the politically charged environment of public education, boards need to be prepared to lead change through creating awareness and inquiry. The change process is likened to the grief process by Calabrese and educational leaders must prepare the social and cultural structure of schools to meet that process (Calabrese, 2002).

As state and national standards and high stakes testing create pressure on local school districts to increase student performance, the importance of relationships increases. The federal government became the chief enforcer of accountability in public education with the 2002 enactment of No Child Left Behind. The resulting friction between federal expectations and local control has created a void between policy and practice (“Conscious Competence Model,” 2003). Fear has eroded the climate of trust necessary for change and policy-makers on school boards are faced with the reality of outside pressures and demands creating internal stressors. “Everyone is responsible for contributing to trust, yet one can destroy it all” (Calabrese, p. 57).

Many doctoral studies supported training and development of school board trustees to improve their effectiveness and to support public education. These studies support intentional and comprehensive orientation and continuous training and development for trustees (Dietrich, 2000; Duran, 1996; Fox, 1978; Geisick, 2006; Hernandez, 2004; Nikolai, 1999; Rezabek, 1968; Robertson, 2003; Simpson-Laskoskie, 2003).

Key Work of School Boards

The Key Work of School Boards is a framework of eight essential action areas that focus and guide school boards in their efforts to improve student achievement through community involvement. The eight areas include: vision, standards, assessment, accountability, alignment, climate, collaborative relationships, and continuous improvement. The framework is rooted in systematic theory that contends that no

accomplishment happens in isolation. As one Key Work area is intentionally or unintentionally addressed, other Key Work areas are affected. Working effectively together, Key Work components can optimize a local school board's ability to make positive and lasting school district improvements. In total, these eight areas are standards for knowledge and performance for school board trustees (Key Work, 2001).

The areas of focus are further defined in the *Guidebook* and on the Key Work webpage. Alignment is using resources to achieve the school board's vision for improved student achievement. Assessment is measuring students' progress toward meeting district standards and goals. Climate means establishing and assessing the environment for effective teaching and learning. Collaboration involves bringing people and groups together to solve common problems. Continuous Improvement is reflecting on what school districts do and seeking ways to do it better. The key area of standards means defining skills, content, and proficiency levels that are expected for every student. Accountability involves implementing quality control initiatives. Vision entails building agreement on core values, beliefs, mission, purpose, and goals with stakeholders in the community (Key Work, 2001). NSBA has published a guidebook for trustees in implementing the goals of Key Work. This book provides detailed activities and instructions for school board members. Each of the focus areas is described by the authors with accompanying examples of excellence in board leadership (Key Work, 2002).

Visionary leaders are needed to provide governance for public schools with the goal of engaging the community for higher student achievement. Gemberling et al., (2000) define vision for school boards:

Vision is not about what we are, but about what we want to be. Vision captures a critical dimension of dynamic systems. For school boards, it is about where we are going and what kind of school system we are trying to create now and for the future. A positive vision is future-focused and seeks to shape events rather than simply let them happen. (p. 4)

A shared vision is unique to each district but should be inspirational and should focus on making student achievement a top priority. Further, this vision should be created by engaging community stakeholders. Core beliefs and common values should be the foundation of this important road map toward the future. The guidebook contains self-assessment tools for the board, superintendent, and staff as well as a case study for community engagement in establishing a school district vision (Gemberling et al., 2000).

Establishing standards is as important for schools as it is for other enterprises...In order to know whether we are performing in accordance with expectations of the community, we need to establish specific and clearly delineated standards...Establishing standards is one of the board's most important responsibilities. (Gemberling et al., 2000, pp. 4-5)

Gemberling et al., (2000) state that standards describe both what students should know and to what proficiency level students are expected to perform. Standards should be stated in layperson's terms and should be reasonable, challenging, and should incorporate state and national standards that are clearly understood by all (Gemberling et al., 2000).

Assessment gives organizations an opportunity to make informed decisions about how well students are doing and provides a basis for continuous improvement. Multiple assessments aligned with academic standards should be conducted annually. Classroom

assessments should complement district assessment programs, and local district assessments should complement state assessments. Assessment is not the end of continuous improvement, but rather the beginning (Gemberling et al., 2000).

Accountability is not unique to schools; other organizations have their own accountability imperatives. In business, it is the bottom line. In manufacturing, it is the quantity and quality of production. In the public sector, it is how well services are being provided. In education, it is student achievement. (Gemberling et al., 2000, p. 6)

Gemberling et al., recommend that accountability processes focus on student achievement. Results should be measured against district standards and should be reported in a straightforward manner that is easily understood by all constituencies. Results should be analyzed from perspectives of growth, comparison, and equity for all students. Student results should drive decision making and should be included as a part of staff evaluations (2000).

Effective systems leaders understand that standards will not be met nor priorities achieved unless the needed resources and support are in place to get the job done...Alignment begins with the budget-setting process...and ends with the mental models that gird system alignment. (Gemberling et al., 2000, p. 6)

Resource alignment is essential to improved student achievement. Reflecting on the following questions will help a board prepare for improved alignment: How is money spent? How is staff allocated? How is the curriculum aligned? How is staff development aligned? How are other resources aligned? If answers to these questions reflect on aligning resources to improve student achievement, the board will have met this goal (Gemberling et al., 2000).

Climate is another important component in Key Work of School Boards.

Climate is an essential aspect of system culture...School boards that understand the powerful effect that climate has on the behavior and performance of teachers and students, as well as on the perceptions of the community, pay attention to the human dimensions of the organization. They articulate values such as respect for others, civility, integrity, and inclusion. And they model the behavior they expect from others. (Gemberling et al., 2000, pp. 6-7)

Climate can be improved by ensuring a safe environment for teaching and learning, examining the capacity for special programs and the data that reflects climate, building a positive culture within the organization, communicating with the media, making schools inviting, and by surveying parents, staff, and students to determine satisfaction levels (Gemberling et al., 2000).

The quality of relationships in an organization will largely determine how well that organization produces. Helping to create the conditions that make it possible for teachers to teach well and students to perform excellently is one of the critical challenges of school boards. That means boards must have an accurate gauge of the quality of relationships. In addition, they must be prepared to take affirmative action to promote better relationships where immediate improvement is needed. Finally, they must commit to fostering long-term collaborative relationships, inside and outside the school system. (Gemberling et al., 2000, p. 7)

Continuous improvement is a state of mind and a state of the organization. Using data for improvement, to challenge the organization and those within it to continual growth will create a living institution that strives for continuous improvement in all areas of operation (Gemberling et al., 2000).

Continuous improvement is perhaps the single orientation that most clearly defines the effective modern organization. Continuous improvement is about paying attention to the quality of what we do. As one continuous improvement advocate expressed it, the goal is not to be 10 percent better in any one area of the organization; it is to be 1 percent better in ten areas of the operation. (Gemberling et al., 2000, p. 8)

Providing a detailed roadmap for boards and superintendents, Key Work for School Board is a current framework for the work of school boards and professional educational leaders (Marino, 2006).

Learning Theory

Researchers have studied the need for board training and the relationship of that training to effective boardsmanship. The majority of research about board training indicates that specific training can enhance board effectiveness (Anderson, 1991; Calvert, 2004; Comstock, 1984; Johnson, 1990; Jones, 1973; Kirst, 1994; Luecker, 1992; McAdams, 2002; Petronis, Hall, & Pierson, 1996), but little research has been done about board members' predisposition to learning. Working with parents and teachers, Dr. Thomas Gordon and associates at the Gordon Training Organization developed a theory of learning known as the Learning Stages Model. Also described as the Conscious Competence Model, this prototype was developed in the early 1970's and was utilized in Teacher Effectiveness Training (TET) and Parent Effectiveness Training (PET). The Learning Stages Model utilizes a Conscious Competence matrix, which illustrates the process of learning a new skill or developing a new behavior, technique, or ability. The learner begins at stage one and passes through four stages, moving towards skill or knowledge proficiency, but the learner can be stalled at any one of four stages or could even regress to a previous stage (Gillen, 2006).

Stage one is known as Unconscious Incompetence. In this stage, the learner's awareness of skill and/or knowledge deficiency is low or non-existent, and the learner does not appreciate the need for training and development. Trainers must create an

awareness of the need for training in order to move the learner to the second stage of learning, which is described as Conscious Incompetence. In the second stage of learning, the student recognizes skill and/or knowledge deficiency and is interested in acquiring training. Although requiring concentration and practice, the learner can demonstrate competence with the new skill or knowledge in the third stage, described as Conscious Competence. In the fourth stage, the skill becomes second nature to the learner. This stage is referred to as Unconscious Competence. In this stage the learner can become the teacher/trainer and assist with training and development of others. While learners can regress in this matrix, moving through stages one through four to develop proficiency with a new skill or knowledge set is necessary. Many trainers make the mistake of assuming that new learners are at stage two when they are, in reality, firmly entrenched in stage one – Unconscious Incompetence – and do not even recognize the need for training. The author of this learning and training theory contends that learners can only respond to training when they are fully aware of the need for training and the personal benefit that they will derive from receiving training (Conscious competence learning model, 2003; Murray, 2005; Redmond, 2006).

Summary

This chapter has presented an historical overview of education and roles and responsibilities of school boards as defined in reviewed literature. The importance of training is framed in the overall importance of the work and service of school boards. Researchers believe that trustee effectiveness improves with training. Throughout the literature, board members expressed preferences for locally developed and delivered

training and development. There is a scarcity of research-based information about trustees or superintendents in Montana and their perceptions about training and development. In addition, there is no research relating school board members' predispositions to training and development and impact of those attitudes on training. Lastly, there was no preference expressed about how Montana trustees want to receive training or from whom.

“Knowledge is what we get when an observer, particularly a scientific trained observer, provides us with a reality that we can all recognize.”
Christopher Lasch

CHAPTER 3

METHODOLOGY

Introduction

The purpose of this qualitative study is to investigate and report perceptions of twelve Montana school board members and three superintendents regarding trustee training and trustees’ predispositions to learning as well as to ascertain preferred delivery methods and person(s) or group(s) most responsible for delivering that training. The data collected in this study were gathered through interviews and analyzed using a grounded theory research design. This design was unobtrusive and often involves interviews and observations (Creswell, 1994; Taylor, 1984). A qualitative approach is an appropriate choice for this type of research because its purpose is to seek “the subjective understanding of individuals” (Marshall, 1985, p. 356). Working through the framework of a learning model that describes dispositions towards training and development, this research provided data about school board trustees’ continuum of learning. In addition to assisting superintendents and school boards, this research will provide education or information for advocacy groups, professional associations, universities, and the public about training and development for school trustees.

Qualitative research investigates problems by examining data in a natural setting. Based on participants’ comments and through observation, the researcher analyzed

portions of data to define categories and connections, and from this dissection created a conclusion from parts of the whole (Creswell, 1994; Mirriam, 1998). Based on inductive logic, the grounded theory design allowed research categories to emerge as data were examined. This inquiry did not start with a hypothesis, but rather permitted each situation to unfold resulting in the formulation of new theories. Patterns emerged from information gathered producing a rich descriptive narrative analysis from coded data (Creswell, 2002; Gliner & Morgan, 2000; Gay, Mills, & Arasian., 2005; Lancy, 1993; Patton, 1990). Approaching the problem to be studied, the researcher tried to further understand the situation from the participants' point of view. The research design continued to emerge throughout the research process, guided by what was learned (Guba, 1978; Paintanida & Garman, 1999).

Grounded theory describes not only the approach to a study, but the end result of the study as well (Charmaz, 2006). Grounded theory creates an understanding about a "particular situation...in which individuals interact, take action, or engage in a process in response to a phenomenon" (Creswell, 1998, p. 56). The researcher categorized data gathered through interviews and field observations and developed a new theory concerning the problem(s) studied. Open coding was the first step in grounded theory data analysis. In this phase, the researcher developed categories. Axial coding or reconfiguring of categories based on a common theme or phenomenon followed open coding. Causes, effects, and context of phenomenon were developed through data analysis. Emerging connections and interconnections helped to illustrate a new truth or

theory (Creswell, 1998, 2002a; Glaser & Strauss, 1967). Data were analyzed initially through the process of unitization. According to Lincoln & Guba (1985):

Units are single pieces of information that stand by themselves; that is, they are interpretable in the absence of any additional information. A unit may be a simple sentence or an extended paragraph, but in either case, the test of its unitary character is that if any portion of the unit were to be removed, the remainder would be seriously compromised or rendered uninterpretable. (p. 203)

Twelve trustees and three superintendents were interviewed to determine predispositions toward training and development for Montana trustees. Demographic information about each participant, including gender, years of service, size of district served, educational attainment, and profession was gathered during the interview process. Interviews were audio taped to facilitate reliability and authenticity. These interviews were transcribed and coded to discover emerging themes. Clarifying questions were often used after the initial interviews. Data collected could have contained errors that are possible with any self-reported information. Another possible source of error was in the perceptual lens of the researcher. Bias of this error could result from the researcher's prior experience as a trustee as well as interest in this topic. The study design, data collection and analysis were examined through the lens of this experience (Vick, 2004). Entries were made in the research journal as data was collected and analyzed to facilitate better understanding of this source of bias.

Participants

Of the twelve trustees participating in the study, seven were male and five were female. Three trustees declined to share their age, but the range of the remainder was 42

to 61. Five trustees met the definition of a novice trustee, i.e., one who is serving a first full term in office. Seven were defined as veterans, that is, having served more than one full term in office. The range of service of the entire pool was one to nineteen years.

Three trustees were from Class AA districts, three from Class A districts, two from Class B districts and one from a Class C district. These classifications are defined by the Montana High School Association according to size of student enrollment. Class AA schools have enrollment of 900+ students, class A schools have enrollment between 370-899 students, class B schools have enrollment between 130-369 students and class C schools have enrollment between 1-129 students. Finally, three trustees served elementary districts which have no athletic classifications. Many of the trustees expressed concern about being identified through the size of district or through some other identifier in this study. In order to maintain anonymity, the researcher grouped the districts into large districts (AA and A districts) and small districts (Elementary, B, and C districts). Trustee participants' educational credentials ranged from high school diplomas to Master's degrees. Three had high school diplomas, five had bachelor's degrees and four had Master's degrees. Their self-reported professions included homemaker, social worker, business or financial professional, government worker, farmer/ranchers, service provider, salesperson and retired educator.

The superintendent participants consisted of two males and one female. None of the superintendents wanted to be identified specifically with the size of their district(s) as they believed it would compromise their anonymity. In addition, all superintendents preferred to comment on their perceptions of board members and training in general

rather than in specific terms. Their requests were honored in examination of the interview data. Each superintendent served with at least one of the subject trustees. None of the superintendents wanted to comment about specific trustees but instead offered general comments about either veteran or novice trustees with whom they had previously or currently served. Anonymous identifiers were attached to each board member or superintendent to retain data accuracy while maintaining confidentiality of all of the study participants.

Table 1: Participant Demographics

Participant Identifier	Gender	Experience	Education	District Size
Mr. Carlson	Male	Novice	Bachelor Degree	Large
Mr. Wilcox	Male	Veteran	Bachelor Degree	Large
Ms. Mohn	Female	Novice	Master Degree	Large
Mrs. Weinman	Female	Veteran	H. S. Diploma	Small
Ms. Larson	Female	Novice	Master Degree	Large
Ms. O’Henry	Female	Veteran	Master Degree	Large
Mr. Baker	Male	Veteran	H. S. Diploma	Small
Mr. Welles	Male	Novice	Master Degree	Large
Mr. Johnson	Male	Novice	H.S. Diploma	Small
Mr. Powell	Male	Veteran	Bachelor Degree	Small
Mr. Meyers	Male	Veteran	Bachelor Degree	Small
Mrs. Norris	Female	Veteran	Bachelor Degree	Small

Veteran trustees (those serving more than one full term), novice trustees (those in their first full term), and superintendents were selected based on availability to the researcher in terms of either schedule or geographic considerations. A non-probability purposeful sample was selected from the entire population of school board members in Montana. A non-probability purposeful sample is used when the entire possible sample is too large. In addition, the researcher was trying to create a sample that included both

veteran and novice trustees and those from both large and small districts so a non-probability purposeful sample was appropriate. Ultimately, saturation of data determined the number of participants needed. When connections and patterns appeared in the interview data, the researcher determined that there were adequate interviews to begin analysis. Theoretical saturation involved discovery of a repetition or connectivity of responses (Gay & Airasian, 2003).

Perspective Taken

Underlying the research questions (see chapter 1) are the standards articulated by the National School Boards Association in the *Key Work Guidebook* and through the Key Work website and related resources. The Key Works of School Boards project serves as the defining standard for knowledge and performance of school boards in the United States. The lens that further filtered these standards was a learning theory developed by Dr. Thomas Gordon (Conscious competence learning model, 2003) which describes a continuum of learning and development that is characterized by attainment of new skills or knowledge and also by an attitude toward training and development.

Process and Procedures

Select trustees and one superintendent participated in a pilot study. This pilot study was used to assist with timing and question delivery (Campbell & Stanley, 1963; Gliner & Morgan, 2000). Pilot participants were asked for feedback after the process, and minor adjustments to the protocols were made to clarify the process. Because concerns about confidentiality were mentioned in all of the pilot interviews, the researcher

emphasized this guarantee in the actual interviews. During this pilot process, the researcher discovered the importance of the research protocol or scripts, as it was easy for participants as well as the researcher to stray from the material. As a result, more time was spent in the memorization and delivery of those questions and to use the protocol as an interview guide. Based on feedback and observation, the researcher decided to ask questions about Key Work at the onset of the interview because this portion was more structured than the balance of the interview. The hope was that the flow of the dialogue would improve with this change. The superintendent pilot interview revealed an unwillingness on the part of the participant to comment on specific trustees but a willingness to comment on trustees in general and a willingness to qualify those comments as they pertained to novice or veteran trustees. Therefore, questions for superintendents were modified to facilitate comment in general rather than specific terms. Changes were made to assure smooth delivery and timing of questions as well as to provide practice for the researcher to maintain involvement in the interview without being too involved in the process and transforming the interview into a dialogue.

The executive directors of the Montana School Board Association and the School Administrators of Montana (SAM) supplied a letter of introduction and support to accompany the researcher's letter requesting participation in this study. All letters are found in the Appendix section. In addition, the NSBA provided a letter of permission to use Key Work material.

After this preparation, the researcher contacted trustees and interviews were scheduled. Study information was sent to each participant prior to the interview.

Participants were asked to sign a consent form (Appendix B) to participate in the study and to be taped. Using the protocol described in Appendix C as a framework, interviews were conducted with identified subjects. At the beginning of each interview, the researcher reminded participants of their rights in the study, its purpose, and of their guaranteed confidentiality.

Initially, participants were given a brief description about Key Work of School Boards. The researcher then asked semi-structured and unstructured questions (see Table 1). These questions were probing and open-ended to determine the participant's knowledge level of this performance standard and to determine the participants' disposition to training and development as reflected by verbal responses, body language and other cues to place the participant on a learning matrix (see Appendix C). Although initial and guiding questions were prepared, the interview itself was driven by questions asked and answers given as they evolved throughout the interview. Because each session was taped, the researcher was able to observe non-verbal cues during the interview, which assisted with validity through member checking. Participants were allowed to review the tape transcripts for accuracy.

Suggestions given by Gay et al., 2005 were the guiding framework for collection of interview data:

Listen. Listening is the most important part of interviewing. Follow up and clarify what is being said. Avoid leading questions. Ask open-ended questions. Don't interrupt. Keep participants involved by asking focused questions. Allow for silence. Be neutral, not judgmental. Don't debate. Observe. (p. 56)

Interview questions were developed based on and aligned with research questions guiding this study. This table aided in study organization as well as facilitated in the planning and preparation of the research design. The table was also useful in assuring that all needed questions were asked of each participant and that all of the research questions were examined through the interview process.

Table 2: Table of Specifications

Research Questions:	Interview Questions
(1) What perceptions do school board members have about personal and professional characteristics and experiences needed for school board service?	(1) Please provide a biographical description of yourself, including education, employment, and length of service on which school board (size of district and location). (2) How prepared do you believe you were when you began as a trustee? - What specifically prepared you for service? - What do you believe are essential knowledge and qualifications for trustees? - Do you think that trustee training and development is necessary? - Were there any areas in which you needed training? If so, what were they? - How did you fill that training gap?
(2) Are there perceived differences regarding knowledge and qualifications needed for board service between board members and their superintendents?	(2b) What do you believe are essential knowledge and qualifications for trustees? (asked of both trustees and superintendents)

Table of Specifications—Continued

(3) What are school board trustees' predispositions toward training and development?	(1) Please provide a biographical description of yourself, including education, employment history, and length of service on which school board (size of district and location). (2c) Do you think that trustee training and development is necessary?
(4) How do attitudes toward learning impact training and development for school board trustees?	(3) What is your familiarity with the Key Work of School Boards by the National School Boards Association? (a) Do you believe that this document is relevant to your board service? Why or why not? (b) Do you believe that there should be training on these Key Works for trustees?
(5) From whom do trustees receive training and what are their beliefs regarding where they should receive their training and development?	(4) Who assists you in professional development? (a) Whose primary responsibility is training and development for trustees? Who is your source of information for issues? (b) What is your district's plan for trustee training and development? (c) What is your personal plan for training and development?
(6) What are preferred delivery methods for training and development for school board trustees?	(5) How is training and development delivered to trustees in your district? Which methods are utilized? Which methods do you prefer?

The interview protocol was designed to include a header to record essential information about the project, i.e. a reminder to review the purpose of the study, complete the consent form, and discuss interview confidentiality with each participant;. Space after each question on the form allowed the researcher to take field notes and record observations during interviews. The protocol also included a closing reminder to thank participants, request follow-up information, if needed, and to assure participants of confidentiality of the current and any future interviews (Creswell, 1998).

Questions were memorized by the researcher to minimize loss of eye contact with participants. Eye contact was important to record non-verbal cues and to be active in observation of other cues. The opening question was designed to define participants' demographics and tenure of school board service.

1. Please provide a biographical description of yourself, including education, and employment and length of service on which school board (size of district and location).

The second set of questions dealt with perceptions of adequate preparation for service on the school board.

2. How prepared do you believe you were when you began as a trustee?
 - a. What specifically prepared you for service?
 - b. Were there any areas in which you needed training? If so, what were they?
 - c. How did you fill that gap?

The third set of questions examined participant familiarity about Key Work of School Boards, developed by the National School Boards Association.

3. What is your familiarity with Key Work of School Boards by the National School Boards Association?

- a. Do you believe that this document is relevant to your district? Why or why not?
- b. How does the work of your board replicate suggestions made in the NSBA Key Work initiative?

The fourth set of questions inquire about who provides pre-service preparation and in-service training for trustees.

4. Who assists you in pre-service preparation and in-service training? Whose primary responsibility is pre-service preparation and in-service training for trustees? Who is your source of information for issues? What is your district's plan for trustee pre-service preparation and in-service training?

The fifth set of questions explored preferred methods of training delivery.

5. How is pre-service preparation and in-service training delivered to trustees in your district? Which methods are utilized? Which methods do you prefer?

The final question was open-ended to gather additional data that may not have been anticipated by the researcher.

6. Is there anything else related to these topics that I have not asked you?

Data management was comprised of transcription and review of interview tapes.

The transcript was carefully checked and rechecked against the taped interview for

accuracy. Both electronic and hard copies that also included field notes and journal observations were produced through the transcription process. All data produced were analyzed according to classic content analysis strategy that identified themes.

One-on-one interviews were conducted in locations selected by participants. Sites included homes, offices, or other public settings. Interviews were the primary data collection instrument. Confidentiality was repeatedly assured in the process. Observer effect can occur during in-depth interviews as well as in observation and data collection. To mitigate such an effect, the tone of each interview was carefully set to establish rapport as was use of a polite, non-judgmental tone.

Immediately following each interview, the researcher recorded thoughts and perceptions in a research journal that was maintained throughout the course of the project. This journal provided a record of immediate perceptions obtained, as well as allowing an instrument for reflection of that experience. This reflective journal was a tool that assisted the researcher in recording field notes, thoughts and impressions before and after interviews.

Results were reinforced through member checking and through triangulation. Triangulation is the researcher's attempt to achieve confirmation or to view research from multiple perspectives. The use of triangulation increases confidence in and credibility of results.

Triangulation is an approach that utilizes multiple data sources (e.g. archival, interview, video), multiple informants (e.g., various key informants), and multiple methods (e.g., participant observation, focus groups), in order to confirm or validate research findings. A primary goal of triangulation is to gather multiple perspectives so as to gain a more complete understanding of phenomena. (Kuzel & Like, 1991)

In this study, triangulation was achieved by using multiple informants—trustees and superintendents. Examining the problem from the vantage point of two key informants provided a more thorough examination of the problem and a more thorough understanding of perspectives of participants involved in the research. In addition, multiple methods were also utilized to add to the dimension of the research. Although interviews were the primary tool for gathering data, researcher observation through field notes and journals provided another technique that was employed in the study procedures.

Triangulation occurred when superintendents were interviewed to verify trustee perceptions and to clarify gathered data. All superintendents participating in the study served with one or more trustees in the study. “Triangulation is the act of bringing more than one source of data to bear on a single point” (Marshall & Rossman, 1995, p. 144). Triangulation is a form of affirmation used to check construct validity and is also important in establishing appropriate operational procedures to address what is being examined in a qualitative study (Yin, 1984). Triangulation was obtained in part by member checking. Member checking involved asking participants in a study to examine rough drafts of transcripts from interviews (Stake, 1995).

During the initial contact with each participant, the researcher explained the process that would be utilized during the interview process including member checking. As each transcript was prepared, each participant was given an opportunity to review the transcript and make any necessary changes. Member checking also consists of reporting back preliminary findings to respondents or participants, asking for critical commentary

on those findings, and potentially incorporating these critiques into findings. In addition member checking occurs during the interview itself. During the interview, member checking consists of the researcher restating, summarizing, or paraphrasing the information received from a respondent to ensure that what is heard or written down is in fact correct. Both forms of member checking may add accuracy and richness to a final report (Kuzel & Like, 1991).

After the interview, when given an opportunity to review prepared transcripts and make additional comments, five trustee participants and two superintendents stated that they did not have time to review transcripts. Of the remainder who did review the interview transcripts, very little new information was gained. The superintendents who reviewed transcripts added detail to discussions and explained reasons for some responses. Four trustee participants who reviewed their transcripts simply acknowledged that the information was correct while three made minor changes to misspelled or misinterpreted words from tape to transcript.

Interview data were examined by the researcher to discover emerging themes. While this analysis cannot be generalized to other populations, deeper meaning and understanding of research participants and their responses to these questions will inform members in the educational field and others interested in these topics and will add to the body of knowledge.

Data Analysis

Analysis of data was concurrent with the interview through the researcher's perceptions and observations, which helped frame analysis of the interview itself.

Restating answers and asking questions for clarification were additional forms of data analysis used to assure an accurate understanding. Analysis continued as interview data were examined by the researcher to discover emerging themes. “There is no particular moment when data analysis begins. Analysis is a matter of giving meaning to first impressions as well as to final compilations” (Stake, 1995, p. 71).

Field notes taken during interviews and subsequent tape reviews were analyzed according to classic content analysis strategy that identifies themes. Analysis of data occurred by use of procedures described by Corbin and Strauss (1990). This analysis consisted of open, axial, and selective coding. Open coding is a procedure provided in grounded theory that was used to develop categories. Ongoing dialoguing with data was used to connect and interconnect identified categories. These procedures culminated in new theory grounded in data (Corbin & Strauss, 1990).

“Grounded theory is a comparative method in which the researcher compares data with data, data with categories, and category with category” (Charmaz, 2005, p. 527). The interview data in this study were carefully coded from interview transcripts. Further dialogue between data and researcher occurred as margin memos were created to capture more meaning (Miles & Huberman, 1984).

Interpretations were developed as themes and commonalities appeared. Reading and re-reading data and its descriptions helped to refine and winnow voluminous information into manageable themes. Intuition and construction of meaning evolved as analysis continued. The end result was the reporting of the data examined (Borg & Gall, 1989; Creswell, 2003; Gay, Mills, & Arasian, 2005; Gliner & Morgan, 2000).

Neuman (1997) describes three levels of coding to be utilized in the data analysis phase of this study. The first round of reading and analyzing called open coding involves assigning initial codes or labels to data. The second round called axial coding assists in further organization of data during the second reading. Ideas or labels group initial codes and provide added meaning. The third round called selective coding occurs during the final phase of data analysis. This phase identifies those specific interviews that support initial outcomes in the first two analyses. Initial examination of transcribed interviews and field notes yielded related categories of information. Utilizing the constant comparative approach, the researcher verified categories by isolating incidences representing identified categories. Exhaustive review of data continued until no new connections were discovered. Categories were divided into distinctive properties that reflected different perspectives of each category. Properties were further dissected and placed on a continuum for comparison. The entire study database was further reduced to distinctive themes and categories that illuminated the process being examined by grounded theory study (Bogan & Biklen, 1998; Corbin & Strauss, 1990).

A central theme emerged from the examination of individual categories. Axial coding identified causal conditions that influenced the central theme. Axial coding identified context and intervening conditions to further develop the strategy. A grounded theory was developed through this coding process (Bogan & Biklen, 1992; Corbin & Strauss, 1990).

After all hand-coding and analysis was completed, the data were processed through the NVIVO 7® software program. Through this electronic analysis, themes and

connections were discovered in interviews, field notes and observations. The interview transcripts together with field notes and journal reflections were submitted as source documents. Each of the interviews was created as a case and attributes of experience, gender, size of district and educational attainment were affixed to each case. Then the interviews themselves were searched for common word usage. Utilizing common themes discovered through hand coding of responses to the research questions themselves, free nodes were coded and ultimately tree or family nodes were constructed from data analysis. Utilizing this electronic qualitative analysis tool enabled the researcher to triangulate data from another approach which improved the trustworthiness of conclusions drawn from the data. Findings were written in a descriptive, narrative style. Utilizing information gathered from participants, the researcher synthesized analysis by sharing with readers a “realistic tale” of the study’s journey (Creswell, 1994, p. 159).

Summary

The researcher gathered data from Montana public school trustees and superintendents regarding perceptions of training and development for trustees in order to arrive at research-based conclusions pertaining to school board members’ perceptions regarding training. Methods of delivery for training and development, as well as who should be the primary instructor for school board trustees’ training, were also examined.

A non-probability purposeful sample was selected from the entire population of school board members in Montana. One-on-one interviews were conducted. The interview instrument was a series of open-ended questions. Research validity was

confirmed through member checking and triangulation. Triangulation occurred through interviews of superintendents who worked with trustee participants. A research journal assisted the researcher with recording observations and reflecting on the interviews. These observations provided additional reinforcing data. Coding of data was done through use of open, axial, and selective coding, which dissected data, and which were then described in a narrative report.

*“Discovery consists in seeing what everyone else has seen
and thinking what no one else has thought.”*

Albert Szent-Gyorgyi

CHAPTER 4

RESULTS

Introduction

This study was conducted to examine perceptions of Montana school board members and superintendents regarding training and development for public school trustees. The study also examined preferred methods of delivery for training, as well as who should be the primary instructor for school board trustees. The study utilized a guiding document entitled Key Work of School Boards developed by the National School Boards Association as the strategic work and standard of the knowledge and performance of school boards. Working through a learning model framework that describes dispositions towards training and development, this research provides data about the continuum of learning for school board trustees. In addition to assisting superintendents and school boards, this research educates and helps inform advocacy groups, professional associations, universities, and public regarding training and development for school trustees.

This research involved twelve trustees and three superintendents from Montana. Data were gathered through one-on-one interviews with participants. Data from

interviews as well as field notes and journalized observations were transcribed and then analyzed by the researcher both by hand and with assistance of NVIVO 7[®] software.

The following sections detail interview data gathered from participants.

Characteristics and experiences of board members, knowledge and qualifications needed, predispositions toward training, attitudes toward learning, preferred trainers, and preferred delivery methods were categories explored through interview questions asked. All names are fictitious.

Trustee Carlson

Mr. Carlson is a novice school board member who has served two years on a large district school board. He has a bachelor's degree and works as a financial professional in the community. He believes that his education and profession as well as the fact that he is an involved parent prepared him for school board service, but he was surprised to discover the unexpected way the board conducted business. He now realizes that he was naïve to think that the school district would run like a commercial business or that his financial business experience would be helpful. He expected a steep, but short learning curve in the area of policies and procedures, but was shocked at the hands-on approach used by the board in the actual administration of the district which this trustee did not perceive as his role.

He thinks that training is important, but says that it should not consume an excess amount of time for busy professionals who already volunteer a large amount of time. He said that he quickly realized that he had things to learn and set about asking questions. He learned that he had some gaps in needed knowledge, but that was in part because the

board was working in areas they shouldn't be. When asked to further explain, he stated that his board really wanted to "run the district, not just supervise the superintendent." He didn't think that it was right, but needed to become better versed in some operational issues. He says,

I initially thought that my finance background and the fact that I work with so many people would be helpful. My sister is a teacher and I thought that talking to her would help too. I work with large budgets and thought that would be helpful in some way, but quickly found that it translated in that we used the same English language, but after that it diverged pretty rapidly. The school system is its own unique and special creation and full of acronyms and almost a different language. Processes and procedures that are utilized by the schools aren't necessarily utilized in other areas and probably the best summary description of it is it is an epitome of the government and functions as most governments function.

In regards to his perceived training deficiencies, initially he turned to the local Teacher's Association president who had recruited him to run for the board. He quickly discovered that the agenda of the Association and mission of the board didn't always intersect. Fellow board members ultimately were his source of training and development. "There was a board orientation retreat and the superintendent lent me a couple of books that were helpful, but for the most part, we were on our own." He says,

I think that...it would be very beneficial to have an almost apprenticeship type capacity for board members. You have elected him to serve and so your first three months-six months or whatever you are a board member in training so that when you are sworn in, you have a little bit of working background and history and knowledge about how things work so that you aren't taking a drink out of a fire hose your first day on the job. How practical and realistic is that? I don't know, it may not be practical or realistic, but it certainly would be beneficial.

Although still a novice himself, he now believes that the most important thing for new board members is an understanding that they don't know everything.

Coming in thinking you know what's wrong and how to fix it is a sure recipe for disaster. The second thing is to realize when you are wrong and change course quickly. The other thing is to come in without preconceived notions of how things are because there is such passion by each constituent group. If you spend too much time listening to one side of the issue, you will be prejudiced coming in. You have to recognize that there is more than one side to each story and your job, as a trustee, is to discover the truth as it appears and not the truth perceived through the sunglasses of somebody else.

Throughout the interview with Mr. Carlson, it was apparent that he recognized some deficiencies in his knowledge, skill set, and preparation to be a school board trustee. He recognized his need for additional training and attempted to extract resources for training from the association president, fellow board members, and to a lesser extent, the superintendent. His approach to training was laid-back. When other trustees shared information about state or national workshops, he listened with interest to what they had learned, but did not attend any of these events himself. Describing training opportunities for the board, he said, "The board chair kept us informed about issues. He attended meetings and gave us the information afterwards."

The researcher's journal reflected an observation of calm control during the interview. His tone expressed some surprise that board service was not what he had expected. At times, frustration could be heard in his voice. He was comfortable talking with the researcher and seemed to enjoy visiting about his work as a trustee. He was comfortable with taping the interview and although he was agreeable to another conversation if the researcher needed clarification or answers to more questions, he stated that he did not have time to review the transcript. He did ask that the researcher be very careful with any mention of his name or his district in the transcript as he wanted to

remain anonymous. He expressed interest in reading the dissertation when it was complete.

Because of his recognition of the need for training, but his relaxed attitude about seeking it for himself, the researcher placed him as moving between stage one, Unconscious Incompetence, and stage two, Conscious Incompetence. He was making some progress in training even though his internal motivation and energy spent in this area was minimal. He thinks that experience is the best teacher for preparation for being a trustee. Trustee Carlson said that school board members just need to experience their roles and grow into them. Asked to explain, he said, “You can’t know what it is going to be like. You just have to experience it.”

Trustee Carlson believes that experience was a good teacher. He also believes that training is situational. He says, “It’s something that just has to be experienced and you have to be able to think on your feet and adjust as you discover the things of this position.” He doesn’t believe that candidates running for school board understand what they will be doing or the time that it will take to do it. This trustee would also like to see an apprenticeship period for trustees so that they could be better prepared.

It’s going to require a significant emphasis placed on training so that we can take someone who may not be qualified to get them the training to get them up to speed so that they in fact become qualified board members. It’s one thing to have the heart to serve: it’s another thing to actually be able to participate in a meaningful way. Training hopefully, would take that person that’s willing and help them become knowledgeable so that they can do a good job and that they understand what their role is. Again, I think that there are members of the current board who don’t understand what their role is. And, they’re fulfilling a role completely disconnected to the actual role that they were elected to fulfill.

He talks about training and fulfilling trustee roles and responsibilities as though he is removed from the situation. He distances himself from the role he occupies when talking training.

Superintendent Mason who has served with Trustee Carlson concurs about experiential learning. Superintendent Mason said,

I would say trustees learned through that experiential learning, if you will, it's kind of like if you where you observe and see the light bulb go on. It's like oh, like I get it. I understand what's being asked of me. I understand not only the questions that are being asked of me or the request, what have you, but the fact, the very fact that with their experiences previously, by being a member of this board, that they can draw from that experience to help make them a better trustee and make an informed decision.

Mr. Carlson acknowledges an on-the-job training process for trustees. He described a situation that could not be totally described to those outside of the realm and a situation that was difficult to train for.

This trustee recognizes his training gaps and is interested in a training plan for trustees. His comments are in the third person which removes them from him and his training plan, but his openness to training for trustees and his emphasis on its importance place him between the first stage of Unconscious Incompetence and the second stage of Conscious Incompetence. His recognition of the importance of training moves him out of the first stage, but doesn't move him totally into the second stage. Time to do any training was a difficult obstacle for him. Several times, he mentioned that he could not donate any more time to the district. He was not negative or resistant to the idea of training, but was not making it a priority by his actions. He supports training as a concept and relies heavily on others to assist him with an abbreviated version of the material if they attend a training event.

Mr. Carlson wasn't sure of the value of Key Work. He said, "These national programs rarely fit in Montana. They are designed for larger districts." This trustee supports an apprenticeship concept for training. He believes that some individuals focused on the eight focal areas described by NSBA, but the "...majority of trustees he serves with do not spend enough time in these areas. We give verbal acceptance to those lofty goals, but we spend very little time actually trying to see to it that any of it is carried out in practicality." Specifically in the area of allocating resources, Mr. Carlson does not see his board utilizing resources for student achievement. He said,

No, we seem to utilize resources and discharge resources with little or no regard for the needs of student achievement. A lot of it happens as the result of the way it's always been done and so we will continue to do it this way independent of need or results. Our resources get spent at the bargaining table first. This involves more than just total dollars, it also impacts resources. The whole process is driven by constituency groups—leadership of constituency groups—not the members. The board deals with this process first and students get the leftovers. Don't get me wrong. Hiring good teachers and paying them well gets good results for teachers, but we are all out of balance.

When he was asked about contribution to the mission of the district, he said, "We created a mission statement in one of our board retreats that, in my opinion, was so encompassing and so politically correct as to being of no value or very little value. It was at best a compass when what we needed was a road map." Regarding standards, he said, "I don't think I have an appreciation for the importance of standards...I think too much emphasis is put on standards." When asked about data used for decision-making, Mr. Carlson said,

There is a lot of time spent explaining away the data rather than addressing the deficiency. For example, we have eighth grade math results that are trending down. Rather than addressing the problem and asking

why they are trending down and what we can do, we spend all of our time explaining away the situation and saying that the results probably aren't accurate.

Mr. Carlson does not see a personal connection between his work as a trustee and the standards established by NSBA. He knows very little about the standards and expresses a minimal interest in learning more. He is progressing slowly in his understanding and appreciation for Key Work. The Learning Stages Model developed by Dr. Gordon has four stages: Unconscious Incompetence, Conscious Incompetence, Conscious Competence and Unconscious Competence. In the first stage, learners are not aware of their skill or knowledge deficiencies. They do not know what they do not know and do not seek training to remedy their deficiencies in skill or knowledge. In the second stage, learners begin to be aware of gaps in their skill or knowledge set and begin to seek training to fill those gaps. In the third stage, some skill or knowledge can be demonstrated with concentration and practice. In the fourth stage, learners can demonstrate or apply the skill or knowledge and are proficient enough to help others ("Conscious Competence Model," 2003). Trustee Carlson is not proficient in the standards of knowledge and performance of school board members. He merely acknowledges his need for training, yet is not active in his quest for it. He is a tentative learner and is unable to articulate what he does and does not know. He is open to learning more, but has applied a minimal effort in accomplishing this goal. He is not totally resistant to training which makes his placement on the Learning Stages Model barely out of stage one and moving slowly on his way to stage two. With encouragement and demonstration of positive results, this trustee could move along the matrix at his pace.

Trustee Carlson is a busy professional and he doesn't think that trustees should be asked to take any more time off of work than they already do. He says,

We already put in the equivalent of a part-time job on this gig [school board work]. We can't take off any more time from our jobs or from our family. We should get position papers from the administrators that we could use to prepare ourselves, but we don't. I count on the chair to frame up the issues and that works pretty well. He has more time to visit with folks in the district and get a pulse on things. We expect him to frame things up through the agenda and make sure that things that come to us are worked out ahead of time

Asked to further explain the phrase "worked out," he said that there shouldn't be any controversy on the agenda items. "Committees should already have heard from the public and the teachers on items and we should be ready to take action on items at the regular meeting."

Superintendent Mason does not believe that his board views him as a training resource. He said, "During my tenure on the board and working with these trustees, we never really did formulate any kind of defined training other than the vision training I mentioned earlier and developing a new vision/mission statement for the District. He says,

Overall, I don't think that the board saw me as a training resource for them in most instances. I had credibility with some and none with others. I think that the board sometimes has trouble accepting training from the superintendent. It is a little like there is an 'us and them' mentality. I think that it is easy to struggle with training coming from the employee. I work for them—they are elected and some believe that makes them the authority. It's a fine line.

Given a list of several delivery options of training and development which included superintendent's training, training at board meetings, MTSBA Conference/MCEL, workshops, retreats, journal articles, mentoring from other trustees,

training from administrators or other delivery options, Trustee Carlson again indicated that going anywhere took too much time and that training should be incorporated into the time already devoted to board service. He wanted the time spent to be limited and the training to be succinct. He said, “Maybe I am different from others. I just don’t want to run the schools like some. I think we should limit our involvement to supervising the superintendent and a few other things so our training doesn’t have to be so involved.” Urged to choose a first and second choice, he indicated that mentoring from other trustees included previous trustees and training at board meetings would be his choice. He has not gone to a workshop or conference at this point.

Trustee Wilcox

Mr. Wilcox is a veteran school board member who has served almost two terms in a large district. He has a bachelor’s degree in human services and has lived in this community for over thirty years. He is fifty-nine years old and currently works for the government. He is emphatic about not running for another term. Being a parent of children in the district prepared him for board service. In addition, he served on a board committee for two years prior to becoming a candidate and ultimately a trustee.

Beyond those two [being a parent and a committee member], I took some board training sponsored by MTSBA. It helped, but it didn’t really help a lot. Experience and believing the other trustees is more important. New trustees really think that they know more than the veteran trustees and so there is no believing each other and so there is a natural resistance to listening to one another.

Mr. Wilcox expressed interest in changing the timeframe for taking office and suggested that the model used for city council or state legislature would be beneficial as it

allowed some training time between the election and taking office. He said, “If there could be a gap between election and taking office like there is for any other elected person in Montana, it would be better. There is no time to get ready for that first meeting and I felt really unprepared. Nobody contacted me and asked me if I needed anything before I came and got sworn in.”

Requirements, according to Mr. Wilcox, included being a parent, knowledge about the community, knowledge about the wage/labor market, and trust of educational professionals. He did not believe that a college degree was helpful. Because he was a parent of two children in the district, Trustee Wilcox knew a few principals and several teachers. He was also an acquaintance of a former trustee and found that to be helpful to him. He knows a lot of people in the community and he has a network of business contacts that he can talk to about schools in the community.

He believed that training and development for school board members is important and suggests the Montana Council for Educational Leaders (MCEL) annual conference and MTSBA training workshops for new trustees. He said, “I know that not everyone can do it, but there should be a formal process of training trustees and educating trustees on all areas such as curriculum, facilities, budget, governance, law and have it done in a real honest dialogue about how all of this fits together.” Time is a real obstacle for training and development according to Trustee Wilcox. “Unless you’re retired or a stay-at-home mom, being a trustee is tough. Your employer really needs to be on board for you to do this.” He thinks trustees should try to learn about the district and how everything works in order to do a good job being a district trustee.

Lots of trustees aren't interested in learning how to be a trustee. They don't think that the rules apply to them and they don't want to be a group. Because they're elected, they assume that they can do or say what they want. Even though we have policies about who speaks for the board and how we get the agendas ready and how we answer people who ask us questions, some of my fellow board members just do what they want. Maybe it is because they're new. I followed the board for a couple of years before I ran because I had a friend on the board. It seems that the board is getting less unified—maybe it is because the board is so diverse now, too. It used to be that the board was all downtown businessmen and now it is really different.

Training in school finance, board roles, and labor issues as well as how a board should operate are knowledge deficiencies which he tries to augment with discussions with the board chair. When he came on the board, he didn't understand the budget reports or anything about school funding so he spent time with veteran trustees and the clerk. He also spent time with the Teacher Association president trying to understand the contracts and negotiation. He is a personal friend of the president of the union and feels that he can talk to him about almost any issue. He looks to the chair for training and development. The board chair provided the orientation when he came on the board. That orientation included policy review, parliamentary procedure, an overview of the legal issues in the district, an overview of the visitation requirements for trustees and the board packets for meetings. The board chair continues to be the person he goes to for information. He calls or emails the chair to discuss questions or issues.

Throughout the interview with Mr. Wilcox, he mentioned the need for training and described how he tries to become a better-informed school board member. He attends state workshops and an annual national conference. In addition, he reads material about

current educational issues in Montana and in the nation. He described his plan for training and development as “slow and steady, learning as I go.”

Because of Trustee Wilcox’s recognition of his need for training and his intentional plan to attend training and inform himself through reading, the researcher placed him in the second stage of the Learning Stages Model. He is slowly, but surely, moving through the matrix to improve his skill and knowledge set regarding service as a trustee. His interest in learning fits the definition of the second stage of learning in the Learning Stages Model.

Mr. Wilcox believes that there should be better entry level training. He says,

There is not time for preparation and I don’t even know what to be prepared for. The reason is there are so many issues on the board’s plate and nobody else really takes charge of the training and trustees don’t really know what it is like to be there. It took me a least a year to get oriented myself and fell like I knew what was going on.

This trustee thought that mentoring and transition training from retiring trustees could be very helpful. He says, “All of the issues recycle and former trustees could help with some of the same issues.” He thinks it is essential that trustees devote the time needed to do a good job. “If you’re going to do it, then do it well.” His dad was a school board trustee when he was growing up and he remembers that it took a lot of time. In regards to essential skills or characteristics for being a successful trustee, he thinks that one must be willing to talk to people, read all of the material that one was given, and stay involved with the schools. He tries to goes to all of his children’s events as a parent and as a trustee. Being visible in the schools is important to Trustee Wilcox. He readily acknowledges that he doesn’t know all that he needs to know, but he is learning.

Mr. Wilcox had not heard of Key Work for School Boards at all and could not comment on its overall usefulness in his training. When he was asked specifics about his involvement and understanding of Key Work, he made the following comments regarding the board's involvement in establishing a vision for the district:

I think that one of the best things that we did was the hiring of a new curriculum person who had a strong background in that field. Previously we didn't have someone who had a district wide focus on student achievement. The curriculum person brought that whole focus to the forefront. Part of the focus was in the community that was more interested in test scores and student achievement. Hard questions were asked at the beginning of my time on the board by a few vocal folks. They started asking how our schools were measuring up--statewide and nationally. People were asking about student achievement information and with the hiring of this person, we really started to focus on that area.

He thinks that working on a vision statement is a worthwhile activity for the board, but believes that other things get in the way and the board doesn't really get time to focus on that area. He says: "The board is preoccupied with labor issues and financial issues and we don't spent a lot of time on student achievement and so we didn't have time to really understand it." He thinks that the district vision should be attached to educational policies.

Regarding his contribution to set clear standards for student achievement, Mr. Wilcox said,

I think that we react more than lead in this area. We are concerned when things don't measure up, but again we don't focus on student achievement as a priority. We are interested in student achievement, but we are really working on personnel issues and financial issues most of the time. The board doesn't always get the information about student achievement. When we do, we react, but don't really lead in the process. We don't really ask the hard questions, but listen to the presentation and nod our heads. As to the state and national attitudes regarding competition, etc. that area was brought up and we wanted to know how we measured up.

There was a sense that we didn't want to hurt anybody's feelings about student performance so that information was always generic and you want to keep thinking that everyone was doing okay so we didn't focus on it—Administration doesn't really share it in ways that we can do anything about it. I think that the board could have understood it, but I don't think that the administration really trusted us with the data. Most of the information was really explained away. It was a cautious attitude that the administration had about the scores, etc. The presentations about performance were vague and ambiguous and there was conflict about telling the "whole" story. We just really take it at face value and sometime wring our hands about it.

The researcher's journal noted that during this part of the interview that although the questions were asked about this particular trustee's experience, involvement, or implementation of Key Work, the trustee responded with an answer for the entire board. His answers indicated his response to the questions, but they reflected the work of the board as a group, not his work as an individual trustee.

Regarding assessment, Trustee Wilcox is aware that there is a lot of testing going on in the district, but says that the board is only minimally involved in the process. He thinks that the district has a solid curriculum and an adequate testing process. He says, "I think that the district has a variety of instruments to test student achievement—normed reference, curriculum reference tests and I think that the district is ahead of that curve—we have a lot of testing going on in the district."

The researcher's notes in the journal made mention that it seemed unusual that the trustee did not connect the work of assessment with the work of the board.

Speaking about his involvement with the alignment of resources, the budget and accountability, Mr. Wilcox said,

I don't think that student achievement drives that process at all. There is the thought that if we hire the best teachers and pay them well, you will

get good student achievement. It wasn't a focus of our budgeting in any year I remember. We do have some programs that deal with student achievement—mostly dealing with students having a tough time. We couldn't maintain it through the years though because of the budget. The budget is a vehicle to spend the money. There is very little discussion about board priorities when establishing the budget. Most of the money is already spent when the budget comes to us---labor, insurance, utilities and anything that deals with text books or curriculum was really leftover money. I don't think we ever talk about board goals during the budget cycles. There's no accountability at all in the budget—everyone talks about zero based budgeting, but it is a myth. The contracts are established and we have to honor those because so much of the contract is tied to labor. If you want to make any changes, you have little choice. We really only get to spend a few percent of the budget. The rest is already spent through contracts, utilities, etc. We talk about budget a lot, but there really isn't much to do about it.

Although Trustee Wilcox knew that the district collected a lot of data regarding student achievement, he doubted that this information is used to make decisions.

We try sometimes, but it is so hard because there isn't any money to use that for—some would have liked to explain it like this is the way it is, there is nothing that we can do to make it better. Some folks just think that we can't really change the scores. Kids will be kids, kind of, but reading recovery was one example of something that we tried to do differently. The board tried to do what the administration wanted to do and I think that this made a difference for some kids.

I think that the board is managed by its focus on labor and financial issues. I think that student achievement would be 3-4-5 in line. The district is managed by labor and money. It has nothing to do with student achievement. Our agenda is driven by money. We rarely talk about academic issues.

Trustee Wilcox was asked about his contribution to establishing a climate for student success and responded:

I think we approved some of the ideas of the administration. We certainly supported the testing, etc. Most of it happened and would have happened anyway, but we try to help students who needed help when we can—most of what we do is administration driven because we aren't education experts and not educators so we don't know what to do or know what has worked elsewhere. We just really have to try and accept what we're told

and follow the lead of the administrators because we don't know what to do about student achievement.

Regarding his involvement regarding collaboration and involving community for continuous improvement for student success, Mr. Wilcox said,

We have a very limited involvement---very limited. In my experience, we operate like a closed business—it's our business—didn't want to involve the community in these matters. You elected us and let us do it. Business people complain about the students' abilities and we have tried to discuss those issues, but we really didn't form a collaborative relationship with them. The business people really weren't involved unless they had a complaint. They really didn't know what they needed—our goal was to prepare student for college, not or work even though half of the kids didn't go to college. Tradition drives the district – not the communities needs and interest---the district is very tradition driven primarily because people are accustomed to the ways things are and change comes very hard.. Parents might have been students there and change comes so slowly in public schools---very tough to change which was one of the great points of the curriculum director we hired because she could help people see the need for change. For the most part though, I haven't seen a tie between the community and student achievement.

Trustee Wilcox has received no training from the superintendent or at meetings.

He said, "I did go to MCEL two times and attended workshops if they were in town. We had retreats, but they had to be onsite and in the public. Usually they are single topic retreats or goal setting times. We probably don't follow the goals, but we did the process." When asked to further explain his statement about not following the goals, but doing the process, he said that his board is interested in giving the correct appearance, but not always in following through. For example, he said that the board had a retreat about goals and even published a document about the goals of the board, but didn't follow through on the goals with board action. He said that it was very disappointing to decide

something as a group, but not be able to support goals with action. Sometimes money was an obstacle to be able to follow through, but sometime it was the board itself.

He thinks that training is an important and worthwhile goal for the board. “The NSB Journal is great. It was interesting to see that the problems we are having are the same everywhere. I had some mentoring, but could use a whole lot more. I think that training from past trustees could be helpful since they have been involved in the whole conversation and we come in in the middle.”

This trustee believes in training for trustees and has attended workshops himself and reads about educational issues in the *National School Board Journal*. His comments place him in the second stage on the Learning Stages Model. He recognizes his limitations and is interested in improving his skill set through training. He is moving steadily and surely through the learning continuum.

Trustee Mohn

Ms. Mohn is a novice board member with a Master’s degree in Human Services who serves as a trustee in a large district. She is 46 years old and currently is not employed, but is a homemaker. Although her time on the board has been fairly brief, she does not think that she was well-prepared to be a board member. Initially, she believed that her college education and extensive volunteer work in the schools would be helpful to her. While she still thinks that these characteristics are helpful, she now believes that there are other things she needs to know. She perceives persistent deficiencies in school funding and budget. In-service training provided by administrators in the district help her

with current issues. She was very uncertain about issues regarding school law as well. Attending workshops put on by MTSBA have been very helpful in this area. She believes that trustees must understand educational funding which is very complicated. Trustees must also know how the district functions, have an understanding of the educational process, and know the district's vision and history. She believes that she was deficient in most areas when she came on the board and has tried to fill those gaps with discussions with the board chair, attending workshops, doing her own research, and talking with administrators. She wishes that the superintendent was more available for information, but says that the board chair is her primary source of training and information.

Regarding training opportunities, she has attended an MCEL conference and found it to be helpful, but only one other trustee from her district was able to attend, even though the conference was local. "Time isn't the issue for me that it is for my fellow trustees. I wish that there was a way we could all go to some of these [conferences]." She thinks that training at meetings would be a great addition to MCEL. "If we could work on one item for half an hour at every board meeting, we could help those who can't get away to go to training conferences and try to get everyone on the same page."

Ms. Mohn was asked questions about Key Work for School Boards to determine her attitudes and predisposition to training and to facilitate her placement on the Learning Stages Model. Although she had not heard much about these knowledge and performance standards prior, she was very interested in learning more. The researcher's journal records her animated interest in this material. She asked the researcher where she could

find out more and asked where she could purchase the *Guidebook* that the researcher had at the interview.

Regarding vision as a worthwhile activity for a board and her contribution to establishing a clear vision of student achievement and attaching policy to vision, she said: “The board has had two retreats on vision and wrote a vision statement and set priorities. The first sentence [on the vision statement] was all about children being able to learn. I think that we should do it [work on a vision statement] regularly and let everyone know about it. And we should attach vision and policies where we can.”

She serves on the education committee of the board and is familiar with the curriculum alignment that has been done in the district to align standards in the elementary grades. She says that the superintendent and administrators have set up achievement levels at each of the elementary grades. The board hasn’t been involved in this process to her knowledge, but the board is aware of this work. In reference to assessment, she knows that there are a multitude of tests administered annually, but says: “The board hasn’t been involved in that. It is up to the superintendent and the principals and the teachers.”

In answer to the question about aligning resources to focus on student achievement priorities, Trustee Mohn said that the board tries to make sure that the budget meets what the teachers need. “Every year, we establish priorities for the budget and the district. Then we place the budget. They work together really.” Reflecting on whether or not the allocation of staff and other resources based on student achievement priorities, Mohn said: “I think that they are. If students at a particular school aren’t doing

well, the principal will probably get moved. The rest of the budget is built school by school based on what they need.”

According to Trustee Mohn, accountability begins with the clerk and ends with the board evaluating the superintendent. “The clerk and the auditors check everything out every year. Then the board holds the superintendent accountable for the budget. In the spring, we look at it and see if we are on target or not.” She believes that data about student achievement are used by the administration to make decisions and establish district priorities. Annually, a report is issued to the community about how students are doing in the district. Parents get regular information as well. The researcher’s notes reflected that this trustee seemed very comfortable about alignment and accountability for student achievement, but did not connect these standards directly with the work of the board. She viewed these areas as the responsibility of the superintendent and administrators.

Although she did not think that she contributed directly to the area of climate, she did believe that the board was involved in this area. “We take surveys at each school about the climate and if everyone feels safe and if the buildings are warm and dry.” Asked further about her definition of climate, she described it as the positive attitude in the school and the feelings of safety for students and staff.

She spoke in general terms about the policy book and believed that the board should review this document often as “...it is the guiding work of the district.” Collaboration was another area that she thought the board should focus on. “We need to have more businesses involved with committees and get them to adopt schools or

programs. We meet with the legislators as often as we can, but we need to go to Helena more when they are in session and stay in touch.” She mentioned that legislators “just don’t get it when it comes to school funding. There just isn’t enough money.”

Building community partnerships focused on student achievement and continuous improvement is important to Trustee Mohn. She said: “We are the elected representatives and we should be out talking to people like clubs and PTA’s and parent groups so that we can tell them what is happening in the schools.” She believes that creating a culture of quality first is the responsibility of the superintendent, but that the board could help with recognizing excellence in public meetings. “The board tries to recognize the valedictorians and the winning teams and outstanding students. If we give them public recognition, then everyone knows that we value student achievement.”

Data-driven decisions are evident to Ms. Mohn in her school board work. She said:

It is really the administrators who bring us items to decide, but they are all centered on student performance. We get a lot of statistics about student achievement. Last year, we bought a new reading program because the students weren’t doing very well on the reading tests. The next year, the scores improved.

Even though she was positive about Key Work based on her comments, facial expressions and overall interest in this part of the interview, she expressed doubts that Key Work was relevant to her board service. She said: “The NSBA has some really great material, but sometimes it doesn’t work here. I think that they are really made for much larger schools.”

Like Mr. Wilcox, Ms. Mohn is a willing learner. She recognizes her shortcomings in understanding the roles and responsibilities of being a trustee and is seeking answers to the questions that she faces. Because she recognizes gaps in her schema and is working to

fill them, she was placed in the Conscious Incompetence stage of the Learning Stages Model. She is barely into the phase of Conscious Competence but she is demonstrating movement in her learning curve. Still struggling with learning what she needs to know, she recognizes her shortcomings and is seeking assistance in training for this volunteer job.

Ms. Mohn believes training is essential and she has tried to take advantage of every training opportunity. She believes that if more training opportunities could be held in her home district, there would be more participation. She believes that there are many persons who could assist in training and development and sees annual training as an important part of board service. The time factor is a problem for most working professionals, herself included. Her interest in training for herself as well as others places her in the second stage of Conscious Incompetence. She is seeking additional opportunities for training for herself and problem solving training opportunities for others. She knows that her fellow trustees have less time than she has to work on training opportunities. She tries to give others a sense of what she learns at conferences or training workshops and shares any handouts or other materials that she receives about items coming before the board.

Although Ms. Mohn was not familiar with Key Work, when she read the summary of the standards and focal areas, she declared that this is where school boards should be spending their time and energy. She says, "I have made every effort to obtain as much training as possible to enable me to participate fully." She thinks that these standards should be a framework for trustee training. She is moving through the Learning

Stages Model and has moved into the stage of Conscious Incompetence because of her interest in learning new skills and essential knowledge while at the same time acknowledging how much she has yet to learn. Both her acknowledgement of needed training and her interest in acquiring it place her in the second stage of the Learning Stages Model.

Trustee Weinman

Mrs. Weinman is a veteran trustee with a high school degree who is serving in a rural district. She has a friend who was a trustee and this friend prepared her for being a board member. She also has her own home-based business and that background has helped her. “Business, especially money training and knowing how to talk to people about the schools, and having kids in the district was really helpful too because I knew some of the teachers and the problems before I started. That’s what’s really essential for trustees.” She doesn’t really think that training for school board members is necessary especially if trustees have a business or have kids in the schools. She doesn’t perceive that she has a training deficiency. She gets detailed information from the superintendent and the clerk that prepare her for meetings. “I didn’t really have a gap, I just followed along. You can ask questions at the meetings, but usually the superintendent keeps us informed. I didn’t know much about the curriculum, but the teachers are trained for that so I just followed their advice. I’m not a teacher so I keep quiet there. I think I get what I need at the meetings and when I talk with the superintendent. We visit schools too to see what is going on.”

She doesn't think that there is a professional development plan for trustees in her district. "I don't think we have a specific plan, just an open atmosphere to ask questions when they come up." In reference to a personal plan for training and development, she says: "I don't have one."

Mrs. Weinman is comfortably and firmly ensconced in stage one of the Learning Stages Model. She does not recognize any deficiencies in her ability to understand or perform her duties as a school board member. She believes that her personal and professional experience gives her the skills and knowledge that she deems necessary to be a trustee and she does not believe that she needs training. In her ignorant bliss she does not realize or accept that she does not know everything she needs to know.

Mrs. Weinman doesn't think that training is necessary for most trustees. "If you have worked in a business or have kids in the schools, you will easily catch up with the others. Visiting schools can help also." Her lack of interest in training and her inability to recognize skill deficiency place her in the first stage.

Mrs. Weinman had not heard about the Key Work, but endorsed it as being good since the NSBA developed it. Like Mr. Carlson, she doubted that it would help in her district since it would probably be more applicable to larger districts. In regards to using it as a training tool, she said, "I don't know if it would [be helpful] or not. We pretty much do what our community wants about the school budget and the superintendent really runs the show. He might find it helpful." Regarding vision statements, she said, "I think it would be best if this [creating a vision statement] happened at the local school and they used their PTA and teachers to create a vision statement that made sense to

them. It is too hard to make a district-wide vision statement.” She doesn’t see any nexus between district policies and the vision statement. Asked if she thinks that the board should attach the vision statement to all policies, she replied: “Well, the policies really are about financial rules and personnel rules. They don’t really match the vision statements.”

She believes that the work of establishing standards for student performance and assessing that performance is the job of teachers and parents, not the board. She knows that the district follows the state standards and students in the district take the state tests. High school students take the ACT when they are seniors if they plan on going to college.

In regards to her contribution to establishing an assessment process that measures student success at regular intervals, Trustee Weinman said: “Again, that’s really up to the educators and the parents of the students. The tests are compiled and we get an overall report. Each student gets a detailed report about their score and that gets sent to their parents.” She is unaware if the assessment program in the district measures knowledge and skills.

The only note taken during the interview with Trustee Weinman was an observation that she seemed detached from her work on the board. Further probing questions on any of the subjects did not yield any more information. This interview lasted 35 minutes.

Asked about aligning resources to focus on students’ meeting the standards, Weinman responded: “We try to buy the things that teachers need out of the budget every year, but there isn’t enough money to do what we need to do. The teachers aren’t paid

very much and they end up buying a lot of stuff for their classroom out of their own pocket.” She believes that staffing to meet standards is the responsibility of the superintendent and principal. The budget is a spending plan according to Trustee Weinman, but she notes that the board talks about priorities before finalizing the budget. “We have to meet the salaries, insurance and utilities and then there isn’t much left over.”

Her contribution to accountability is recorded as follows: “I try to listen to what people tell me and follow the policies about purchasing and stuff like that. We just approve things. The superintendent makes those decisions.” Data about student performance is given to the board by the administration to the board each spring. She indicates that the principal and superintendent look for trends in the report. When asked for an example of a decision made from this information, she said that teachers decide if kids are moving on and the principal decides if everything is working well in the building. Communication to the public about data-driven decisions regarding student achievement includes communication with parents and the public, often through the local newspaper.

Regarding personal contributions to a positive climate for student success, Trustee Weinman responded: “The board doesn’t really do that, but the principals have special awards for students that get high grades and at the high school graduations, the valedictorians are announced.

Ms. Weinman was asked if the core values and beliefs of the shared vision are modeled in the work of the School Board. She replied: “Well, we have one for ourselves that really is about ethics and policies and budget and we follow that.” She believes

policy framework of the district assists the superintendent to meet student achievement goals. She believes that the “...superintendent is the manager of the district and he makes sure that everyone is doing their job”

According to Trustee Weinman, collaboration consists of the following activity. “The board chair writes to legislators and invites them to meetings during the legislature. Several large businesses support schools by donating equipment or money for special projects. Some of the service groups in town recognize high school students who are leaders and who get scholarships.’

She also believes that continuous improvement is the responsibility of the superintendent and not the board. “That’s [continuous improvement] not the board’s job—it is the administration’s. I don’t think that we could do that, but I think that the teachers do.

This trustee’s abdication of board responsibility and lack of interest in board education place her in the stage of Unconscious Incompetence.

Trustee Larson

Ms. Larson is a novice trustee with a Master’s degree who is serving in a large district. She believes that her college education prepared her for volunteering in this capacity. Also, getting to know her children’s teachers has been very helpful in doing her school board work. She believes that a college education is necessary as well as an understanding about the budget and knowing what goes on in the classrooms. She supports training for new trustees. Knowing that she had a gap in knowledge about school law, she attended an MCEL workshop, which she found to be very helpful. The

board chair has been very helpful in answering questions and she wishes that the superintendent would be more helpful. Having attended the workshop for new trustees, she believes she is prepared to fulfill her duties as a trustee. She is a social worker in the community and as such gets an opportunity to visit with many community members and she finds this helpful in understanding how the community sees issues in the school system.

Although Ms. Larson recognized initial deficiencies in her training, she has become very comfortable with the minimal training she has received. She appears to be stalled in stage one of the Learning Stages Model with only a minimal interest in continued education about her role as a school board member. Ms. Larson stated that she needed training on all issues.

Ms. Larson believes in the value of training as well and further believes that this responsibility belongs to the Board Chair. Like Mrs. Weinman, she is trapped in the stage entitled Unconscious Incompetence where she will remain until she recognizes the need for training and seeks that training for herself.

She viewed herself as a contributor to the vision of student achievement and said: “I attempted to provide input as a Board member to focus our work on students, and achievement. This was difficult due to the political nature the school district, where students often were not the priority. It is a difficult, skewed system at times.”

Regarding establishing a vision statement and her contribution to that effort, Trustee Larson thought that this was worthwhile work, but that it should be directed by

the superintendent and not the board. She supported policy being connected to the vision statement.

Commenting on standards, she said. “This is the superintendent and administration’s job.” She believes that there are multiple assessments in the district especially since the onset of No Child Left Behind. The board is kept informed and takes action when requested by the superintendent, but otherwise, this area is reserved for the district, not the board.

Her involvement in contributions to align resources for student achievement was to support the administrative staff that was responsible for those areas. She views the budget as a spending plan and not a vehicle for accomplishing priorities. Staffing and resource allocation decisions are not based on student achievement in her estimation. She said: “It appears that resources for the district are used for teachers first, and student achievement later...This is why legislative funding from Helena must be earmarked to ensure the funds go to the specific project.”

Regarding strong accountability, she says that she fulfilled her role as a board member, but believed that accountability is a standard for paid employees, particularly the superintendent. Regarding student data being used for decision making, she said: “Student achievement, particularly failure in an area on a major assessment system, appears to get the attention and additional funding to correct the area. I do not see this as a system that promotes those who are doing well and encouraging them to continue to do so.”

Communicating to the public was the responsibility of the superintendent according to Trustee Larson. She said: “There was a report to the community that explained student achievement information. I do not believe that report linked achievement to the decision making process. The superintendent should have done a better job of this.”

She thinks that the core beliefs are modeled somewhat in the work of the board and believes that policy framework should provide clear direction and empower the superintendent and staff to meet student achievement goals. She said: “It is the function of policy framework..... It works when you have a Board who does its job and develops policy.”

According to Trustee Larson, the board continues to make efforts to build partnerships with the business community. “This is an ongoing process that begins with the development of positive relationships with business leaders and politicians. Student success needs to be the priority. It appears that this community is trying to join forces with the District promoting the up and coming mill levies.” She believes it is the superintendent not the board who should lead this effort.

The board has not done a good job, in Trustee Larson’s estimation, of creating a cycle of continuous improvement. She said: “We tend to sit on our laurels too much. This has been a long-standing problem in (city). The Board needs to work on this.”

In regards to data-driven decisions, Larson said: “The Board manages facts and data-driven decisions based on the information presented to them by the administration.”

Ms. Larson saw many of the subsets of Key Work as someone else's job. The teachers should be responsible for student achievement and assessment; the clerk should be accountable for budget and resource alignment; the superintendent is responsible for a climate of collaboration; and establishing a collaborative community culture was also the responsibility of the superintendent. She saw no connection between these standards and her board service or training. She is comfortably situated in the first stage—Unconscious Incompetence. She simply does not know what she does not know and this predisposition will keep her in the first stage of the Learning Stages Model where she will remain until she recognizes the need for training and seeks it for herself.

Trustee O'Henry

Ms. O'Henry is a veteran board member with a Master's degree in a large district. Her degree is in education, but she has not taught for a very long time. Regarding her preparation for board service, she says,

I don't think I was prepared at all looking back on it. I thought I was prepared because I had attended meetings and served on the PTA at my kids' grade school, but as it turns out, I wasn't prepared at all. I guess I thought that being a businessperson was helpful because I could read budgets and understand personnel issues. My bachelor's degree was in education, so I understood the language a little.

She also followed the board activities through the local newspaper and the information that came home with her children from their elementary school.

She believes that training about budget, personnel, school law, policy development and teamwork are all essential skills for a board member. She thinks she was deficient in the areas of budget, special education, policies and law, boardsmanship

and contract negotiations and tried to fill those gaps through talking to administrators and teachers as well as going to local, state and national meetings. She also spends time discussing these issues with former trustees and the superintendent. She notes that not many trustees talk to the superintendent. “I don’t know why. He’s very nice, but I think that some have a trust issue or want to be seen as independent of him.”

Ms. O’Henry is eager to find additional ways to improve her ability to be a trustee. During the interview, she even asked for recommendations from the researcher. She is not self-deprecating about her knowledge level, but very matter of fact about wanting to continue to learn. Commenting about her veteran status as a trustee, she said, “The more I do this, the more I know that I need to know more!” She is making conscious steps toward improving herself to be a better board member. She has purchased several books about educational issues at the local bookstore and at a national convention. A retired educator herself, she finds the topics interesting and ever-changing.

Ms. O’Henry enthusiastically supports training for school board members and thinks that it would be especially helpful if it occurred before being sworn in. She says,

I think that there should be a training program before you become a trustee. Some of the trustees that I work with don’t go to training and don’t listen to anything new. They just won’t change their point of view on any topic. They seem to know everything and just shoot from the hip without any regard for the consequences of their votes. I guess they don’t see the value of training and development. I guess it won’t work if you don’t want to learn.

She was knowledgeable about many of the Key Work subsets and interested in knowing more about the others. A veteran trustee, she has attended many workshops.

Ms. O'Henry agreed with Ms. Mohn about the importance of Key Work and student achievement.

It made me realize that we don't focus on student achievement when we are making decisions. We get the information, but really don't use it. We spend a lot of time on the budget, but it is usually about meeting the needs of employee contracts. We don't talk about how the budget could improve student achievement or how the employee contracts could help with student achievement.

Stating her contribution to establishing a clear vision of student achievement as a top priority in the district, Trustee O'Henry said: "I worked with the board to create a vision statement with action plans. The community stakeholders were involved in this process. We made the top priority student achievement." She believes that the vision statement is a worthwhile activity for the board and that the vision should guide the work of the board and the work of the district. There should be a connection between the policy work of the board and the vision statement of the board.

Trustee O'Henry has supported the administrative objectives and recommendations for setting or adopting standards for student achievement. She is aware that the administration has set expectations of what students are supposed to know at each grade level. There are multiple assessments used in the district to measure student achievement and student success according to O'Henry. She has supported administrative recommendations to ensure that there is budget support for regular assessment and professional development for staff and board members about assessment. Her understanding of assessment is as follows: "Testing is one way of assessing student performance. The essential skills measurements and mastery measurement measures

skills at each grade level. The other standardized and criterion tests measure student knowledge.”

Regarding alignment of resources to focus on student success in meeting standards, Trustee O’Henry said: “The board tries to make sure that the resources are put where the students need them. We have a policy for moving staff to keep the teacher resources fluid. Also, principals are reassigned if their student scores don’t improve.” Although she doesn’t always think that staff and resource allocation decisions are made with student achievement in mind, she hopes that those decisions will focus on student achievement more in the future. Asked if the budget is a vehicle for accomplishing priorities or simple a spending plan, Ms. O’Henry said: “No, it is really a vehicle to pay for contracts and essentials. There is little discussion or decision making that reflects what is needed in the budget to ensure high student achievement.”

In her district, the board ties accountability to the superintendent’s performance appraisal. “We make it apparent how important this is to us and the public by making it a point that we evaluate the superintendent on.”

Student achievement data is brought to the board and discussed and explained. Administrators and teachers explain what the data mean, but not usually what can be done to improve it. Communication to the public usually consists of a snapshot of what the data are and what it means to individual students—if they have or haven’t improved overall in the district. There is also information shared with the public about school by school performance, particularly if schools don’t meet their performance goals.

Trustee O'Henry celebrates student achievement with her fellow board members. Academic excellence is honored at board meetings. Exceptional students and their teachers are recognized at board meetings. The results of high school students and their ACT scores are reviewed every year. Opportunities for Advanced Placement classes are offered in the district and every year, outstanding students are acknowledged by the board at graduation.

The board doesn't always model the vision and core values of the district according to Ms. O'Henry. "I think that this board gives voice, but not always action to the vision statement. We can't always do what we want to do, but we try to put a good face on it."

Policy does provide direction to the administrative team in O'Henry's district. "Policy talks about the value of student achievement and the superintendent's evaluation in part dealt with student achievement." She goes on to detail that the superintendent keeps student achievement in the forefront of the board's work. Because student achievement is a part of the superintendent evaluation process, the board is kept up to date in this area so that they are aware of progress in student achievement as it relates to the superintendence's work.

Collaborative relationships with political and business leaders in the state and community are important to the district and to the board.

We tried to inform politicians and business people about the need for resources for education so that the students and teachers would have the resources that they needed to improve student achievement. Even though we tried to get more money, it seems that all of it went to salaries and not to supplies or programs to help students. Business partnerships helped fill

the budget gap by providing needed essentials and extras for students especially at low income schools.

She said that the priorities and student performance standards reflect the community's needs and interests. She said: "I think that the community wants the very best for students, but so often we had to put the needs of the teachers first." Asked for more detail about this comment, Trustee O'Henry said that contract negotiations have taken their toll on the budget and also have taken a great deal of time for the board. "It's not that it's not a part of what we should be doing, but it takes a lot of time and we can't focus on other things. I would like to see us figure out what else we can be doing that would help kids even if it is thinking outside of the box, but we don't have time to focus on those areas. We don't get much time for planning, just kind of staying barely on top of things."

Regarding continuous improvement, Trustee O'Henry said:

I don't think that I was ever able to contribute personally to continuous improvement. We really haven't focused on this area as a board. We expect things to get better, I guess, but we really don't look at the whole picture and see if we are doing better and better. We measure ourselves against the state and national data and we usually are above those two groups so we are really happy about that, but we don't really look at our scores to see if there is a positive change over the last year's numbers

Asked if the board has developed a culture that puts quality first among all other considerations, Ms. O'Henry said:

No, we have established a culture of employee satisfaction and oftentimes that culture conflicted with quality for students. We want everything to run smooth and not have any employee dissatisfaction so we really focus on that first. It is important. Don't get me wrong. I am an educator at heart although my experience was really different from the ones we have now, but because of low state funding, we really are up against the wall with paying employees. Insurance costs are going up, utilities are increasing, and we really want to have schools be pleasant places, so it is important to have high employee morale. Our district has had conflict in the past and

the board is determined not to go there again. So I guess we are focusing more on a culture of peace than a culture of quality.

Regarding data-driven decision making, O'Henry says that the board receives data from the administration, but usually that information is just explained, not acted on. She said: "We did have some data, but the data was usually explained away instead of becoming the basis for decision-making.

Although O'Henry just heard about Key Work through this interview, she believes that this document would be a good training tool for her board. She said: "I don't think that my board knows much about Key Works. We haven't ever discussed it in my eight years on the board and although I have been to a lot of conferences and training meetings in the state, I haven't ever heard of it before today."

She is moving through the matrix and is situated in the second stage and will probably soon move to the third. She is moving through the matrix because of her quest for training. Because she described herself as still struggling to learn, she was placed in the second stage, Conscious Competence, of the Learning Stages Model. This trustee is moving through the continuum of learning illustrated by the Learning Stages Model because of her acknowledgement of needed training and her efforts at seeking it for herself. She is making progress as she seeks training for herself in order to be a more effective trustee.

She thinks that annual statewide meetings are good training venues because visiting with other trustees is a training opportunity. She also likes reading the NSBA Journal that she receives from the district. Her district sets money aside for trustees to go to the state meetings and for a few trustees to attend the national meeting. There is an

informal orientation for trustees at the beginning of their term. Veteran trustees do the orientation. As to her personal plan of training and development, Trustee O’Henry is taking a college course about special education so that she can learn more about this area of the district.

Trustee Baker

Mr. Baker is a novice trustee serving in a small district. Baker is a 54-year-old rancher with a high school diploma. His family has been in this community for a very long time. He believes that his involvement as a parent helped him to be prepared to do board work. Because he is a rancher, he knows the value of budgeting, which has been helpful. Listening to others in the community really helps him on the board. He believes that the greatest skill for a trustee is the willingness to learn. He acknowledges knowledge deficiency in many areas and attended MSBA [MTSBA] workshops to help fill the gaps. He believes that training is necessary for trustees and he gets most of his information from the board chair. Overall, he thinks that the chair and the superintendent are responsible for training, but the superintendent tends to be too busy. His preference for training would be training by the chair at board meetings.

Trustee Baker has heard of Key Work and has read about the program on the NSBA website. Asked about his contribution toward establishing a clear vision of student achievement, Baker said, “I have been on a strategic planning committee that worked on a vision statement for the district. We had community members and teachers, principals, and even students on it.” He believes that working on a vision statement is a worthwhile

activity for the board and that the vision statement should attach to policies whenever possible.

According to Baker, the responsibility of establishing standards for student performance belongs to the superintendent and the administration. He does not believe that this standard is a responsibility of the board. He thinks that the superintendent has established grade level priorities and a curriculum for the whole system. Students are tested in these areas on state, district and classroom tests. He is unsure if assessment measure both knowledge and skills. He said: “We really aren’t involved as a board in assessment. We just support the teachers and principals and superintendent about student testing.”

Baker thinks that the board does align the resources to meet the needs of students. He said: “When we set the budget, we try to get teachers what they need and if we have to make cuts, make them as far from the classroom as possible.” He believes that staff and resource allocation support student achievement as well. The budget is a tool for meeting financial obligations. He said: “It’s really just a spending plan to meet our obligations. We don’t get to do much creative with it. There isn’t enough money. We have declining enrollment and since the money follows the kids, we are losing money.” As a trustee, he thinks that reviewing the bills and budget monthly is his contribution to accountability.

Uncertain if data are used to make decisions in the school district, Trustee Baker hopes that data is used by the superintendent and the principal. He said: “I don’t know if the decisions are really linked, but we do report the results to the community.” Asked to

explain further, Baker didn't have any examples about how the community received the information.

A positive climate for student success is the responsibility of the principal and the classroom teacher according to Trustee Baker. He said: "Positive attitudes are important in helping kids like school. I think that the principal and the classroom teachers are responsible for this. They set the tone."

Trustee Baker believes that the core values and beliefs of the shared vision are modeled in the work of the board. Further, he believes that the policy framework provides direction and empowers the superintendent and staff to meet student achievement goals. He said: "I think that the policy book is the way that everyone knows what to do. It is the document that gives the superintendent direction from the board. It also ties the policies to state law."

Involving business people on committees is one way to keep them involved in the district. "We have business people on our committees and try to keep them involved in the district. Businesses here are also very supportive of schools by sponsoring different activities and attending events at the school. In the high school, there is a mentor program that business people run. It's very helpful for kids to explore careers." Trustees also help keep community and business people involved because trustees are out in the community talking to people and keeping them informed.

Trustee Baker is uncertain if trustees are involved with continuous improvement in the district. He believes that this standard is the work of the superintendent. Overall, he

is uncertain of the relevance of Key Work to his district or to his own training and development.

Mr. Baker finds training and development from the Board Chair most beneficial. He intends to keep learning through his time on the board. He is uncertain if training is necessary for most trustees, but has found it helpful for himself. He is taking small steps out of the Unconscious Incompetence stage toward the Conscious Incompetence stage. He has met the first requirement of moving through the stages of learning by acknowledging the need for training for himself and seeking to fill his skill and knowledge gaps through training.

Mr. Baker is an inactive learner. He has attended two workshops when they were in his community, but does not demonstrate a curiosity to continue to seek out training opportunities. He professes a willingness to learn, but has not had a great deal of time as a trustee to apply that willingness to training opportunities. Because he is open to learning and has attended two workshops, he was placed between the Unconscious Incompetence and the Unconscious Competence stage on the Learning Stages Model.

Trustee Welles

Mr. Welles is a novice trustee with a Master's degree serving his first year on a large district board. He is a Montana native who has spent most of his adult life outside of the state. Returning to his home on retirement, he wanted to find a way to volunteer his time in the community and decided to run for the school board. He has served less than one year.

He believes that his professional background has assisted him in his service on the board. Management principles, working with diverse populations and seeking consensus amongst people are all skills that have helped him. On a more concrete note, he had disaster preparedness training and when he came to the district, he helped update and implement disaster planning. Early on, he recognized that he had a deficiency in understanding the budget planning process and reporting, so he made an appointment with the business clerk to review those documents to become better prepared to work with and understand them. He received an induction from the superintendent and has found him to be very helpful in answering questions. In addition, he has attended two training classes sponsored by MTSBA for new trustees and found those to be helpful as well. He has found that talking to educational professionals (teachers, principals, and the superintendent) as well as the clerk, and district secretary have all been helpful. “It’s good to talk to everyone so no one thinks that you are rubber-stamping the administration.”

Mr. Welles would like to see a library of resources for trustee training. Because trustees are at different places in the learning curve, everyone could benefit if there were a resource library or handbook to refer to. His style of learning involves questioning and he is willing to do that, but observes that others are not. He is not sure of the value of training and development, but adds the caveat that he is very new at being a trustee. He has attended some workshops and found them helpful.

Trustee Wells is surprised about the steep learning curve for new trustees and the lack of resources that there are to help in this process. He’s surprised at the length of time

it takes to get things done. In his previous work background, decisions were made and implemented more quickly and with a smaller decision-making group.

Welles believes that trustees have to be internally motivated to get training.

Further, he doesn't see training as part of the superintendent's job. He said:

I don't think a superintendent should have to spoon feed a trustee. And I think the prudent superintendent will say "I've dealt with school board members in the past who've come on board. These are questions that could be typical. Here is some information I think you need to look at. And here's my number, you make sure you call me if you've got any questions. So that the way I think a superintendent should approach it.

He went on to say that the superintendent is in an awkward position for training.

Because it is an unique governance structure where individuals as individual as they can be have limited authority yet collectively have so much power over the superintendent as their one employee and yet here's the CEO, the educational president, if you will, the one within whom we trust the knowledge to guide our decisions and I've seen over and over a trustee is elected and there is an informed board, sometimes a team, sometimes people just sitting at a table and a superintendent may be hired by one group, that changes over time and there's a change in the direction. I personally want to charge the superintendent to set the direction in consultation with the board so that the direction is still the same even if the players change.

Trustee Welles seeks training in multiple venues. He said:

I've talked to teachers, I've talked to principals. Also, teachers, principals, the superintendent, the business manager. The district secretary who's been there forever, I've talked to her many times. Those are the internal people I approached to get up to speed in terms of training. And there was the county training and then the school board association.

His district budgets for trustees to attend state or national training and he expects that he will continue to take advantage of those opportunities. He thinks that state training is better than national because the issues are so different in different sizes of districts. He said: "There are different issues on the east coast and on the west coast than what we're

dealing with here in Montana. The one comment that I would make is that there is a lot of material out there and you can really inundate yourself with that so I'm kind of particular because I don't want to just get bogged down in minutia."

Trustee Welles is unaware of a vision statement for the district or for the board. He describes his board and fellow board members as being pro-active and committed. The board puts a lot of credence in what the superintendent says. He respects that perspective, but believes that his learning style is to delve deeper. He said:

...do the footwork, go out and look at the process, talk to the person whatever it is myself. It's not because I don't trust the superintendent. It's just that if I'm going to vote on an issue or topic, I want to make sure that I can comfortably cast that vote. So to answer your question, I think that most of my fellow school board members go with what the superintendent says because he is a very good guy whereas I'm a little, I'll ask questions and I'm not afraid to do that.

His previous work experience is helpful in achievement data. He applies it to school board work as well.

When I came on board, you can have an internal gut feeling how you're doing, but show me the money, show me the metrics. I want to see the test results and one good thing our district is doing the testing. I think it is the ITED and that's almost real-time. The teachers can pull their class and they can see exactly where little Johnny is weak and little Suzy needs help here and that's a good tool. Yes, and so with my statistical background, I really like that.

Regarding data-driven decisions, Trustee Welles said:

Oh yes, absolutely, yep absolutely and I can give you an example. We have several elementary schools and we've had one elementary school that was lagging in reading so that was one of the questions that I sat down with the superintendent and said "why is this" and "we need to investigate this" because it was a statistically significant difference. So, yes we do make decisions based on those metrics, those assessments.

Welles went on to say that he thinks that asking questions is how you learn.

And trustees need to ask those pertinent questions because it isn't personal for you. It's everyone's right to know but the nature of being responsibility is difficult to examine those with an impartiality that's really important as you make decisions. And I think my fellow board members and my superintendent know that I'm not out to hurt anyone feelings however our goal our vision is to train each of those kids educate each of those kids and they deserve it and we need to ask the tough questions. If you have a weak superintendent and a rubber stamp board, that's a recipe for bad things.

His placement is between stage one and stage two. Like Mr. Baker, Mr. Welles recognizes the need for training and in some instances has sought it for himself. Because he has only a few months of service, he has not moved very far along the training continuum. More time and more experience will assist him in his training and development so he was placed between the Unconscious Incompetence and Conscious Incompetence stages in the Learning Stages Model.

Trustee Johnson

Mr. Johnson is a novice trustee with a high school education serving in a small district. He is 51 years old and is a rancher in the local community. He has been on the board for one year He believes that he was fairly well prepared for board service because he graduated from the school district, has kids in the district now and keeps in close touch with their teachers. He thinks that knowing people in the system is an important skill for school board members because trustees have to rely on educators to help them with issues. He said, "I am not a teacher. I am just interested in the schools." In regards to training or knowledge deficiencies, he has struggled sometimes with educational jargon, but has had the support of many people in the schools to help him. When asked about

skill or knowledge deficiencies, Mr. Johnson said, “Well, sometimes I need a dictionary to know what all of those educational terms are, (laughs) but not really.”

He’s uncertain of the need for training and development at this time in his board service and has not been to any organized training opportunities yet. Mr. Johnson is unsure of the necessity of training and development. He relies on his board chair to keep him informed on issues before the board. He doesn’t recognize the value of training and development for himself or others. He is placed in the Unconscious Incompetence stage of the Learning Stages Model.

Mr. Johnson did not relate the description of the Key Work of Schools or of its focus areas to his effectiveness as a trustee. He drew no correlations and said that the document had little or no value to him or to his board.

He stated that the board had not been involved in creating a vision statement, but he believed that there was one at the district. He doesn’t think that the board should spend a lot of time on the vision statement. “I think that the vision should be for kids to get the best education that they can. How many ways can you say it?”

He thinks that the vision should attach to the education policies, but that is all. He doesn’t think that the board is involved with setting standards. “I think that the teachers set the mark and the kids try to meet it. Our kids score pretty high on tests. I think that there are minimums for student to pass onto the next grade. Beyond that, the parents probably let the kids know what they expect.”

He is unaware of the assessment measures used in the district as he has not been involved in that process yet. He stated that the assessment program measures both

knowledge and skills and said, “I think different areas test different things so it depends on the class.”

Trustee Johnson was uncertain of allocation and alignment processes in the district as he was so new to the board. He said that he expected resources were used to help students, but that he really didn’t know. When asked about this topic, he said: “I think so. They better be, right? I am sure it is—like if a program isn’t working, they will try something else.”

Communication to the public is usually done through parents and through the local paper according to Trustee Johnson. Core values and beliefs are a part of the work of the board because “...I am not sure what you mean by core values and beliefs. I think our personal values are there because we are volunteering and we are part of the community.”

He believes that the policy framework established by the board assists in helping the superintendent to keep things running smoothly. The community supports the school district and, in particular, the business community is involved in supporting the schools by sponsoring events and teams. Continuous improvement is within the responsibility of the superintendent and teachers and not the board. He believes that the board operates from data-driven decisions because of the material that they receive before making important decisions.

Comfortable with his skill set, Mr. Johnson is ambivalent about the need for additional training. When asked if he had encountered any areas where he thought he was unprepared, he said, “Not yet, but if I do, the chair will help me out.” The chair in his

district is a veteran trustee. Mr. Johnson was uncertain about any training that the chair had received. Because of his comments and expressed predisposition toward training, Mr. Johnson was placed in Unconscious Incompetence stage of the matrix. He does not recognize the need for training, is unsure of its benefit. These comments place him in the first stage of the Learning Stages Model where he will remain until he recognizes the need for training and seeks it for himself.

Trustee Powell

Mr. Powell is a veteran board member with a bachelor's degree serving in a small district. He has his own business and this allows him the time he needs to do this type of community volunteer work. He believes that his preparation came in part from listening. He recognized that there were people on the board from whom he could learn and so he listened and observed. He also spends a lot of time in school buildings listening to staff and talking to everyone. In addition, he talks to trustees all over the state and finds that most of the issues are the same wherever one goes. Being willing to learn is the most important skill a trustee can have, according to Mr. Powell. He has worked with a number of board members who just didn't want to learn. They seem to have strong convictions and they don't change. They came in knowing it all and nothing has convinced them differently. "Maybe it is the public nature of meetings that they don't want to ask questions," he says," but they seem like they already know all of the answers." He has received more training from the board chair than the superintendent. Asked if superintendents were helpful with training, he said:

Each and every one of them had different management styles. Some hands-off some much more actively engaged in the board process. To me once again it's situational depending on the board. Some boards need more hands on, other boards are saying you know what we have a pretty comfortable, we're comfortable we're confident in what we're doing and so the superintendent is kind of like the guy at the till. Let me kind of keep you honest here, you guys are doing all the work. You're the ship if you will, let's just make sure not the Titanic and got holes in the ship. And then other times there were we had to have superintendents that were much more that had to be much more forceful and step and say No, no, no do you understand if you go in the direction what this means.

The more that Mr. Powell talked about his service on the board, the more it appeared that he is in a continual training program. He talks to many people about board service. Previous trustees, community members, business persons, trustees across the state, administrators, teachers, custodians, trustees in other states were all mentioned as people he dialogues with about school board work.

He serves on a committee for MTSBA and regularly discusses issues with the staff in that office. He is eager to learn and has attended every training opportunity that he has known about since he came on the board. He describes himself as needing to learn a lot more and is quick to minimize his expertise and experience while asserting that he is a "trustee trainee." He realizes that there is a lot to learn. He spends a lot of time in school buildings talking to anyone who has the time.

Like I said, I treated it like work so for me I spent a lot of time in the building visiting with staff. We had luxury on the board, we'd meet or they met once twice three times four times a month for three four hours then you'd get to go home. I liken it to any board I'm on. We come in, we have a mission, we have vision and then we leave and then the people who inherit it are staff. So staff is important to me. I spent a lot of time. I'd go out and visit. So I just sat and talk with everybody.

Regarding mission, Trustee Powell says that the board developed a mission statement, but didn't really involve anyone else in the preparation of that document. Looking back at it, he believes that more people should have been involved in the process. "It became the board's vision statement because the board wrote it. We put it up in every building and it was really good to look at, but I don't think that anyone really accepted it because they weren't involved."

Reflecting on the standards involved in the Key Work of School Boards, Trustee Powell said that the board is very involved in supporting standards. "There are standards for the state, standards for the nation, standards by subject area and they all have to be met. Our principals and other administrators are very well versed in these areas and keep us as informed as they can."

That was one of those issues where I was always trying to find out more information. I visit with (name) or I'd visit with the superintendent. I'd sit and bug with them and ask them and say I need your help on here. Because once again those standards, there were so many standards it became I won't say overwhelming but you had to understand what we were talking about.

"It is the same way with assessment. There are so many tests now that it seems we are constantly getting reports about how the students in the district are performing. Most of the students are doing very well, but we have areas of town and some subject areas where students are struggling. The closer it was to the classroom, I think the better we did. The further it got away from the classroom, then it became much more philosophical in nature."

Trustee Powell sees accountability as an oversight area for the board. The day to day responsibility of accountability falls to the superintendent and administrative staff.

The board just supports that process through the actions of the administrative team. He said: “I think there’s accountability depending on the issue. I always say accountability and responsibility sometimes are two different things. We’re ultimately responsible for this, but we feel like we’re accountable to this group.”

Alignment of resources including budget allocation and staff is something that the board is involved in second hand, according to Trustee Powell. “Basically, we follow the superintendent’s recommendations. The superintendent has to balance all of the needs of the district including student achievement. By the time we meet contract obligations, insurance, utilities and supplies, there is very little left to allocate.

Collaboration needs to be more than a word according to Trustee Powell. “You talk about collaboration/coalition building. Not everybody’s going to be a partner so once again sometimes you are on the same page, sometimes you’re not. But you have to have that collaborative effort. It’s important to see issues from every side. Everyone has different needs. Everyone sees things differently.”

Climate is important in a “people business,” according to Trustee Powell, but it is better left to those who run the district day to day instead of the board of trustees who are supposed to set policy and hire and fire the superintendent. “We can be visible in the buildings and help to set a positive tone, but in reality it is the superintendent and the principals who are better at setting the climate for high standards and student achievement.”

Collaboration and continuous improvement are important aspects of trustee work according to Trustee Powell. “We represent the community to the schools, but we also

represent the schools to the community. We have to find meaningful ways to carry the messages back and forth and foster a sense of ownership and understanding. As a business person myself, I know that I didn't understand everything about schools. It's a two-way street and we have to look both ways." Continuous improvement also means continuous improvement for trustees and students. "We have to be learners ourselves and model that behavior. Many of the trustees that I work with won't go to training even if it is in town. They are deeply rooted in the conviction that they know everything that there is to know. That's dangerous ground."

Some know the stuff that well that they don't need training or don't think they do. Well I don't need to do that or it's not the best use of my time. Well, you want to be a good trustee? You want to be a good employee? You learn your job; you got to do what you got to do. And continuing ed (sic) issues are something that I think are an integral part of your employment; your boardmanship and when you use the boardmanship I think people will use it but not understand what it means. It is that vision. Are you willing to do self assessments? Are you willing to go out there and talk about quality issues? Are you will to take some hits even when it hurts? Yeah, boardmanship. Are you willing to listen to others and not get mad?

This business [education] changes all the time according to Trustee Powell and the only way that trustees are going to learn all that they need to know is to get training.

Folks would say, yeah I already know all that. I thought well just because you take you work environment and you think you can transpose it into the school. Where was I, it was a great conversation about it one time and we were talking about it. It's running a business that's not a business like you know because the end product is your children so it you want to color your world, say I have two thousand employees a hundred million dollar budget, this is what we do this is what our deliverables are oh by the way, I forgot, as you're leaving the room, did I tell you we'd be teaching your children. Whoa, whoa, whoa, I'll come back into the room because of everything else, if you took that component out of the conversation, talked

about benefits, if you talked about work environment, the environment in the classroom, but if you didn't use those words, say classroom, just talk about it as a job say any business here in town. Oh yeah, I know what you're talking about. And then said, by the way, the other thing we have to tell you is that the end user is your child. So, I don't say all bets are off, but all of a sudden that emotionalism that comes back onto the table, people say well, wait, wait, wait, you know, those rooms that you were talking about I know they said they sound like alright, but those are my kids in there.

Mr. Powell has embraced training and development for himself and encourages others to get involved also. Often, he shares the information he gets at conferences or finds in his readings with other trustees. He judges that individuals have different levels of interest in training, but believes that there should be more local opportunities. He is progressing through the matrix and is in the Conscious Incompetence stage. Because Mr. Powell is on a steady path of training and development, but does not describe himself as proficient in his boardmanship, he was placed on the second stage of the Learning Stages Model as a Conscious Incompetent. He will continue to make progress if his attitude and persistence continue. Recognizing his person need for additional training and seeking it for himself place him in the second stage of the Learning Stages Model.

Mr. Powell thought that the program must be a good one because he supports the NSBA. The NSBA Journal has been very helpful to him and he thinks that the quality of that magazine is so good that Key Work must also be good. He thinks that this program should be available to school board trustees. He is an avid learner and is progressing through the Learning Stages Model. His placement would be in the Unconscious Competence stage soon moving onto the Conscious Competence stage.

Trustee Meyers

Mr. Meyers is a veteran trustee with a bachelor's degree. He is 60 years old and has served for seven years on the board. He serves in a small district and is a business professional. He believes that his background in business and finance was really helpful in preparing him for school board service. He believes that being an involved parent is also a helpful asset. "This really helps me keep a focus on what is happening in schools and because I am at my kids' activities, people can talk to me about what's going on in the district. " According to this trustee, training in fiscal areas, hiring the superintendent and oversight of public schools would be helpful for some trustees. He doesn't perceive that he has any training gaps, but if he did, he would talk to fellow trustees or his teacher friends. He thinks that teachers and principals are the best source of information for school board members. He says that the superintendent is not a good source of information as "...he has been here a long time and isn't popular with some." Asked to further explain, he said that he thought the superintendent was on his way out.

Because Mr. Meyers does not perceive any skill or knowledge deficiencies for himself, even if he suggests training topics for other trustees, he was placed in the Unconscious Incompetence stage of the Learning Stages Model. He is a long-time trustee who has not attended any training opportunities. If he needed training, he would prefer to have it at meetings that he is already attending versus going somewhere else.

His district does not have a training and development plan for trustees, but there is a line item in the budget for attending meetings. He said: "We have a line item in the budget if we want to go to a national meeting or something. We usually take turns with

that. I haven't gone, but some of the others have gone and had a real good time. They usually tell us about it when they get back. I think that the chair goes every time and takes a different person with him."

His personal plan for training and development is as follows: "I just keep up with the issues on the agenda. They send us the information that we need to know to make the decisions. Usually it is really smooth and the board chair gives us a heads-up if any items are going to be difficult, but usually everything just runs like clockwork." Asked if he had advice for others or if there was anything else he wanted to add, he said: "I just think we should find more opportunities to talk to teachers and be in the schools."

Asked about any needed training, Mr. Meyers said, "No, not really. I have everything I need." He does not perceive that there is a training gap for him personally. Mr. Meyers thinks that training should have a local flavor, but believes that most of the problems encountered are universal so there is no need to reinvent the wheel. Listening to local educators will often be the most helpful according to this trustee. He said: "I think that every trustee should go to MCEL once and meet other trustees and talk with them. The problems are pretty universal. We don't always have to reinvent the wheel. Talking to teachers is really important so we can find out what the needs are." Training and development is not a priority for most trustees according to Mr. Meyers. His unwillingness to embrace training for himself places him in the Unconscious Incompetence stage. Like his colleague Trustee Johnson, Trustee Meyers is comfortable in Unconscious Incompetence stage of the Learning Stages Model. He does not recognize any skill or knowledge gaps for himself that would urge him to seek training. He will

remain in the first stage of the Learning Stages Model until he recognizes his deficiency and seeks training.

Regarding his contribution to establishing a clear vision of student achievement as a top priority of the board, staff, and community, Trustee Meyers said: “It really hasn’t been my contribution, but the contribution of teachers and principals who have kept student achievement a priority. That’s really their domain. I support it of course as a trustee and a parent, but I can’t claim any responsibility for it.” He thinks that working on the vision can be important to the board. He said: “I think it can be. The board really should have a vision and the district should have a vision because we are working on different things. They have a job and we have a different job. Our vision is the thing that we evaluate the superintendent on.” In regards to whether the board should attach policy to vision, Trustee Meyers said, “No—policies are the rules we live by—they don’t have anything to do with vision.”

Setting standards for student performance is the job of the superintendent and staff according to Trustee Meyers. “That is the job of the superintendent and his staff. There are state standards and national standards, but again, they aren’t set by the board.” He believes that the district sets goals for each grade level in the elementary school and the teacher chart each student’s progress. In reference to assessment through multiple measures, Trustee Meyers said: “Well, there are high – stakes tests because of No Child Left Behind. In addition, each classroom teacher gives a lot of tests and assessments to measure student progress. These go out every six or eight weeks to parents.” Assessment is a “teacher and principal area, not the board’s.” He said: “Again, we are lay volunteers,

it is really our job to monitor the budget, protect the taxpayers interest and hire and fire the superintendent. It's his job to take care of the education issues."

In regards to alignment of resources to focus on students' success, Meyers said: "Every year, the district staff—mostly principals bring us a budget that is in balance with what we will be getting from the state. When it is out of alignment, then we ask the local community to pay for a levy which will provide the balance. When the levy passes, everything is great; if it doesn't pass, then we have to make cuts." According to Trustee Meyers, "Everything we spent money on is about students. It is also the accountability to the public that we are managing the district well. The trustees are liable to the public to be accountable with the funds. It is really a big part of our job to review contracts, bills and the budget." Communication to the public is done through a newsletter sent out to parents.

This document talks about how kids are doing in the district and gives a calendar of current events in the school.

Trustee Meyers does not believe that creating a positive climate for student success is his job. The superintendent and principal and teachers are responsible for this standard. He thinks that the core values and beliefs of the shared vision are modeled in the work of the board, but could not provide any current examples.

Regarding policy and student achievement, Trustee Meyers said: "Like I said, the policy book is the rules book or the play book. That's where I look for answers and I expect the super (sic) to enforce those rules."

In reference to community involvement and collaboration, Meyers said: "We need to let them [political and business leaders in the state and community] know what our needs are. They expect us to prepare students to be the work force in the community, but we don't have enough money to do what we need to do. For example, our community is really interested in science, but our science equipment is old. Businesses could help us

with that.” He believes that business community leaders are interested in the schools, “Yes, the businesses are interested and expect our students to do well. We are a small community and everyone knows everyone else.” Asked if the priorities and student performance standards reflect the community needs and interests Trustee Meyer replied: “I think so. That’s why we were elected. We are the ears and eyes of the community.”

Responding to the questions about the board’s commitment to continuous improvement for student success, Trustee Meyers said: “I guess we do because we hire and fire the guy who gets it done or he hires the person who does.” The educators in the district are responsible for developing a culture that puts quality first. Regarding data-driven decisions made by the board, Trustee Meyers said: “We operate from the recommendations of the superintendent and also from the principals and teachers. They are on the front lines and tell us what we need to know.”

Mr. Meyers concurred with Trustee Johnson about the need for training on Key Work standards and said, “Like most national things, I don’t know if it really applies to our community. We aren’t facing the problems that other folks are. We have pretty well-behaved kids who do pretty well in school. There’re problem areas everywhere, but our problems aren’t like big schools or large communities.”

Trustee Norris

Mrs. Norris is a veteran trustee with a Bachelor’s degree serving in a small school district. She is 62 and retired. Being a business person and an involved parent helped prepare her for school board service. Currently, she is a homemaker. Although she

perceived that she had knowledge gaps, she filled them with the assistance of administrators, teachers, fellow trustees including the chair, and the superintendent.

Serving her second term, Mrs. Norris did not express any interest in attending training workshops. Though she has asked questions of those around her in board service, she seems very comfortable with her current understanding of issues before the board. She underscored her comfort level by mentioning that she always votes with the majority. She was placed in the Unconscious Incompetent stage of the Learning Stages Model.

Mrs. Norris believes that training is crucial for some trustees for this difficult job. She believes that there should be orientation and ongoing training for some school board members. She says that her fellow trustees who need it the most are those who don't have the time to go. She has not attended training for herself and feels confident about her skill level as a trustee. She endorses training in name only and does not seek it for herself. This limits her development and places her in the Unconscious Incompetence stage. Asked about the importance of a vision statement and whether it was worthwhile activity for schools boards, Trustee Norris replied:

Well, we hired the best superintendent we could find and we get out of his way and let him do his job. We know that academics are a priority in this community and we let him know that. I think that the superintendent and his principals and teachers should do this [vision statement]. There is a vision statement posted in the front hallway of the school, but I don't know who wrote it.

In regards to connecting the vision statement and the policies, Trustee Norris replied: "No, I think that policies are separate. Vision is the big picture, the goals and policies are the rules and laws. "

Regarding standards, Mrs. Norris says that the board accomplishes this through the superintendent. She said: “Again, we make it clear to the superintendent that this is important to us and to our community. The state sets the standards for each class and we try to meet those standards. Again, I think that the state does that—maybe with our superintendent. The teachers set up the standards by grade level about passing and what you learn when.

Regarding testing and the board’s involvement, Trustee Norris said: “Every year, the students take a standardized test and get measured against the state and national averages. The parents get detailed information and the board gets a compilation of the results.” There was a disconnect about the board’s role in this process. She is aware of the testing and that there are standardized tests which measure both knowledge and skills, but she did not mention a connection with assessment and the board’s work or her involvement in that work.

Commenting about the alignment of resources to focus on student’s meeting standards, Mrs. Norris said, “We make sure that the schools have what students need—new books, computers, etc. When something isn’t working well, the superintendent might come to us with a special request—like reading tutors. One year, we had a dip in the reading scores and we put tutors in some grades. The budget is the way we get things done—we try to prioritize the money and do what we can. Every year, we have some tough budget decisions. Each month we review the budget and the bills that were paid.”

Accountability is the role and responsibility of the clerk, according to Trustee Norris. “We have a part-time clerk who monitors the business part of the district. He has

annual audits and we get a report. An outside accounting firm reviews our budget and spending.”

Data driven decisions do occur at the board level. Norris cites the following example: “Yes, again like the reading tutors were hired from that student data. If our students aren’t measuring up in some area, we try to find a way to help.” Communicating with the public about connecting data and decisions is unclear to Norris. “I don’t know if there is way to talk about how the data and the decisions are linked. Most folks just want to know that kids are doing well, that the schools are safe and that the kids who want to go to college can compete with the kids from larger schools.”

According to Norris, positive climates are created at the building level, not the board level. She does believe that the core values and beliefs are modeled in the work of the board. The policy book guides the work of the district by providing a list of state laws and district procedures.

Regarding community collaboration, Norris says, “There is a business booster club that supports activities in the school and it is not just about sports either. They help with the service club at the high school and the career day for juniors. They raise scholarship money for graduating seniors, too.”

Continuous improvement is enacted by supporting the superintendent. Norris said: “We hire the superintendent and support him so that we can keep him in our district. He’s been here awhile, but the few before him were only here a couple of years.”

Commenting on data-driven decisions, Norris said: “When we have big agenda items, the superintendent usually writes a report about why we should or shouldn’t do what he is asking us to do. He lists the pro’s and cons on most items.”

Mrs. Norris doubted that trustees would have time to work through Key Work. From the description, she thought it sounded generic and believes that if it is important to his district, she will hear about it from the Board Chair or the superintendent. She is placed in stage one and will remain there until she values training for herself. She does not take personal responsibility for the benefit that she would receive from training. She will remain in the first stage of the Learning Stages Model until she acknowledges her skill and knowledge deficiencies and tries to remedy those through training.

Superintendent Mason

Superintendent Mason works with Trustees Carlson, Wilcox, and O’Henry.

Describing the trustees, Mason said:

I would have to say overall that there are varying degrees of knowledge on the board and certainly their veteran-ness and their tenure on the board has influence on their knowledge and decisions that they make and votes they take as far as background and experience and so on. So, certainly our members of the board who are new to the board have a fairly steep learning curve. The knowledge obviously is vastly different from veteran or tenured trustees.

Regarding the veteran trustees, Superintendent Mason said that they had had some training on roles and responsibilities from the previous superintendent. “However, in dealing with the complexity with district issues, until you’ve actually experienced those situations or been faced with complex decision making, I don’t know how much of that

training comes to the forefront for those individuals to help them in those complex situations.”

Mason said that constituents really influence veteran trustees. “I think they are relying on the various factions whether its constituent groups within the district to teachers; the teacher’s union, the administrators, fellow trustees, the superintendent, central office staff, whomever. I think that all weighs very heavily on how they actually arrive at a decision or arrive at a vote.”

Mason sees trustees growing through a continuum of learning that is based in experience. “They can draw from that experience to help make them a better trustee and make an informed decision. But, very definitely you can tell the veteran-ness of how they arrive at their decisions, how they are able to sort through the menagerie of information and come to some sort of decision.” She went on to say that experience was training in and of itself.

According to Mason, “The brand new novice trustee comes in, I think, truly overwhelmed because they don’t understand the systems issues or the complexities of organizationally how things operate or function in a larger school district.” Conversely, she said: “The veteran trustee has had that learning experience and they understand the procedures and the organizational structures of how things work and how decisions are made and committee work and how that finally ends up at the full board level...all of that is under their belt so they can draw from that experience.”

Superintendent Mason did not witness trustees trying to obtain training prior to the election. The training more often than not was experiential after they were elected.

“So to do overall training during my tenure as a superintendent, I really don’t see a lot of defined training as far as duties and responsibilities for trustees in the District.”

Asked if there were areas that required training for trustees, Superintendent

Mason said:

Definitely. I believe that because of again the responsibilities and the things that are being asked of trustees in order to carry out their duties that they need to have not only an understanding of the big picture of how school districts run and function and operate but they also have to have in each little component that builds that big picture. Let me give you an example of that. I think it’s paramount that trustees truly understand how policy is written; how policy is then implemented in the District and what their role is and what are the responsibilities as a result in implementing that policy.

She further explains what she sees as a difference for novice and veteran trustees.

She said:

Now again if we go back and look at a novice trustee; to truly understand a policy and what their duties and what their roles and responsibilities are relating to that policy is one thing but then having experienced it through an experience an actual situation or case study, if you will, adds incredible knowledge to that trustee because they now have a firm understanding of what that language says to them as it relates to policy and truly what their role should be as it relates to that particular case study. So in my mind, that veteran trustee has an advantage because they’ve experienced more things and they have had that transference if you will from policy to actual experience and having gone through a full cycle.

Working on a vision statement was a good experience for trustees in the district.

There was a disconnect, however, making a link between the vision statement and what happens in the district in the individual schools buildings and individual classrooms. She doesn’t think that trustees were able to connect the work of the board and the work of the district through the vision statement.

Commenting on the work of standards and the work of the board, Mason said: “I truly believe that we have and again I would say more from our veteran trustees’ vantage point than our beginning novice trustees or first term trustees.” She qualified her remarks as follows: “Now, having said that and even with this minority group feeling and holding this belief as one of extreme importance. I believe some of that is self-taught knowledge and understanding versus what we might consider boards’ overall knowledge and understanding of standards.”

Other things happen within the District like creating a district level awareness about student achievement whether it is by overall grade levels at key strategic grade levels within the District or maybe content area subjects; reading, math, science, for instance. We looked at some curriculum areas and continue to bring that to the forefront to trustees but yet even by still doing that there are times when I feel we are bringing either curriculum changes or model changes; instructional changes to the forefront for board approval and they seem to kind of go through a rubber stamping if you will. I’m not sure that they are ever really scrutinized or looked at or embraced as being extremely valuable for whatever it is we are trying to do to improve student achievement. An example of that might be just a reading model. For instance, we were looking at various reading models at the time I was in the District that we really believed would help our lower SCS schools and what it was we were trying to do to improve reading test scores and trying to get some buy in and some sense of understanding as far as what that means as it relates to curriculum and some affirmation from trustees that we were trying to garner never I don’t really feel as a board as a whole that we ever got that. I think some smattering of that, again, by these invested somewhat more knowledgeable trustees than the board as a whole.

Commenting about trustees’ knowledge of assessment within the district, Superintendent Mason said that the trustees as a whole have very limited knowledge. Not only do they not understand assessment as a mechanical operation in the district, but they are also unaware of why assessment is used.

Accountability is another standard that she believes trustees know very little about. “Certainly the goal is always to keep the board in the communication loop about those things, but it isn’t, I believe, really connected to student achievement and issues of accountability related to student achievement. It is very limited.” Further, as accountability relates to student achievement, she said:

I think that when that data is presented there are a few ahas but I think it gets lost in the minutia detail. I don’t think it is ever used to really help drive other decisions; whether it is staffing decisions or curricular decisions or the like. I think they value the importance of that information being brought to them to try to gain some sense of understanding of how our students in this district are performing and what is happening as far as learning in the classroom but again I don’t observe a transference to OK now how do we connect this data to what it means as far as textbook acquisition for instance or curricular changes or assessment. There is still a disconnect there.

Asked about alignment for student performance and the work of the school board, Superintendent Mason said:

In my experience, again I would say it is very limited. Again we have glimmers of hope from members of the board and again some of understanding of the importance of making that connection however I think there are other variables that seemed to again usurp that level of importance. Things like tight budget times and trying to take funds that are being asked of. They are trying to distribute funds for many, many things all of which are considered to be a priority and trying to make difficult decisions dealing with budget and how to best allocate those funds. I think some of that has to do with constituent groups bantering for those funds over other constituents group and so it lost sight of what’s the level of importance, here. I think primarily it has to do more because of fiscal constraints. Even though I know there are trustees that hold this near and dear; that student achievement is important; they know that and I think there is a sense of overall interest in aligning how monies are spent and how the budget is allocated, but I never see it really go full-circle.

Mason does not believe that her trustees understand alignment or focus on it in regards to student achievement. The same is true for climate. Both of these items are

impacted by tight budget times, but also a competing voice for budget dollars. Rarely are student needs discussed as decisions are made about alignment or climate.

Commenting on collaboration, Mason said:

I just think that's an ongoing goal. It's something as a superintendent you always want to strive for however during my tenure on the board we have had factions of the board that have some interests outside the board as a whole, if you will, some I hate to use the word detractors but I guess that's the best way to explain it that really are not interested in forming some type of collegial relationship and often times work in isolation, promote thing in isolation, kind of go off on their own path if you will that is maybe counter to a board perspective or where the board is going as a whole. So it is this notion of collaboration I think that's always something you strive for and build in that collaboration so that they can function and operate and work as a board as a whole but I think that when you have individuals that view some kind of an autonomous role and value themselves as a single individual versus seeing themselves in how they should mesh in their role as a trustee and function as a full board. I think that's really difficult to accomplish that. In my experience, that seems to be very prevalent. It has been very consistent throughout my entire tenure where we have had certain members of the board that just really hold different beliefs and never really want to align themselves to a board's way of thinking it you will.

Regarding continuous improvement and the board's interest in this topic, Superintendent Mason said: "No. I think we have a faction of the board that is very interested in that aspect of district operation but would I say it is a driving force or interest? No, not overall."

Mason hasn't observed a plan for training and development for trustees. Trustees can attend state and national meetings and she encourages them to do so. "I think that training through the annual conference that is held is certainly good training for trustees to participate in. I would encourage every trustee, certainly a new trustee, to attend that state training."

Asked whether the superintendent was seen as a source of training in the district,

Superintendent Mason replied:

I try to be there both individually and collectively whether, maybe this isn't really what you consider training, but I think it's an ongoing thing; providing information; providing recommendations and just reiterating again what it is you're asking them to do. I think superintendents are continually doing that. Whether it connects policy; whether it's connecting process, procedures and who's doing what. I think that's always important for a superintendent to try and lay out the whole picture on what is being asked of them as a trustee on a particular vote or what have you. So I think that's always an ongoing thing.

Recommendation for training would include relationship building and boardsmanship.

I talked before about the detractors or the folks that maybe kind of go off on their own and do some things maybe counter to the full board, whatever and what is the role of training as it pertains to all that and helping to build and assist that collegiality and how do you continue to work with that on an ongoing basis and I think it's a very complicating thing because you are again talking about lay people coming in from all walks of life with all different perspectives and trying to get them to form some type of collegial working relationship which is a very difficult task

Superintendent Sanders

Superintendent Sanders has worked at several small districts before becoming superintendent at this small rural school district. He has been in this district for several years. He did not want to comment directly about trustees, but agreed to discuss training in general and trustees in general. Superintendent Sanders serves with Trustee Meyers, Norris and Johnson. The researcher's notes from the journal indicate that after the interview, he began to identify trustees in his district in some detail.

Superintendent Sanders is unfamiliar with the Key Work for School Boards and asked to talk in general terms about training rather than a specific set of standards. He suggested that “we just talk, instead of asking and answering questions.”

In regards to aligning resources for student achievement, Superintendent Sanders said:

I think that most educators prepare the budget with students in mind, but trustees can always adjust those priorities based on their preferences or what they think that the community will support. It’s always a balancing act. Trustees want to do the best they can, but they have to listen to a whole lot of folks out there especially about budget.

Superintendent Sanders went on to say, “As an educator you can bring them an educationally sound plan but they have to use the community perception as a sounding board about what’s reality. That was my experience as well. We were much more likely to do other things—sometimes that is what local control is about. Sometimes I felt that if I gave them an idea, they would oppose it, but if it came from somewhere else, they might consider it.”

He doesn’t think that trustees in his district will travel anywhere for training. “They are already busy with their families, jobs, or farms and ranches, and it is difficult to get away. Although people in Montana usually want to see folks face to face, I think we are going to have to use e-mail, telephone, and video programs to bring training to people in their local community.” He also believes that trustees will want to be trained in their home environment. He said: “I think that the trustees that I work for like to be trained in small settings, not with a lot of other people. I think that trustees believe that

there problems are unique to their own district and so prefer to have some training where they're at, so they can ask questions.”

Regarding whether trustees have good prior preparation for school board service, Superintendent Sanders said: “No, I think overall they haven't been. You're asking me if they came well prepared, I don't think anybody does. It's very difficult; they have a different perception about what their role is. It takes a good year for our trustees to get their feet on the ground.”

Asked about training for school board service, Superintendent Sanders said:

You know trustees almost needs to get their hands burnt a couple of times before they kind of realize just who all they are dealing with. What each of these constituents wants and you know they come pretty innocently into this new environment and it take a while and sometimes some real hard knocks before you kind of get what the jest of it is. You run a political show, and it is different and it is competitive. You can't lose your focus upon what you probably believed when you ran for office, but it's hard not to.

Further about training, Sanders said:

I think our board members actual do the orientation here. They are very good at it, I sit in and assist but they are so good at it.” But I think with not coming in with an agenda, that's not easy, but luckily here I think that's been more the rule then the exception. They kind of get nudged in, as I mention, by others and they come in with no particular ax to grind.

Asked what important skills are for school board members, Sanders said: “So I think the other thing is communication skills are real key—knowing who you can go to. The administration is only doing their job, of keeping them informed, but they've got to call in.”

Discussing particular training challenges, Sanders said:

As I mentioned I have a fairly new board member, her place of business is extremely busy and she has a hard time getting away. She has just had a new child, and I find myself going to her place of business. Trying to sit down with her at lunch time, and let her quiz me. I try to give her almost sound bites of what's happening, I also urge her to talk to her fellow board members. I think that's a great way to kind of checking the creditability of others and finding out perspective of other board members. She doesn't do that, my other board members kind of shake their heads and say "how come she doesn't call. I don't often get called, and we show up at a board meeting and of course we get some surprises. There is still some raising of hands-- why is she doing that to us? We have always been team players, and it's not even the team player its more, gosh we all know that answer to that. Why doesn't she call and talk to us or, at least share some information.

Conversely, Sanders has a veteran trustee who goes to every training opportunity he can. "Sometimes he comes to staff trainings because he wants to know more about a program."

His trustees run into time problem to get training as well:

There again we really try to open as many doors as possible for training activities with MSBA and other workshops that are out there. So that she can take that in, in her particular case it's running a business. She has a very busy new practice and is raising some very young children. I am very sympathetic, and I think people are somewhat sympathetic. But, there is a certain amount the sympathy when you take on this job, there's a feeling there where you have to devote some energy and time or it is just not going to work.

Regarding his role in training, Superintendent Sanders said: "I think the superintendent or the chief administrator, whoever, really does have to encourage that role in training. You got to make it easy for them to get MCEL or easy to get even to the national convention."

They don't have much time to go to training so we try to do some training here. I mean I think you know each board meeting we try to do some types of training, actually, here I've spent a lot of time on policy and so you know we've really involved our board and we are up to speed, I mean

we're right you know we're as current I think as any district in the state. So we do spend a lot of time and they are very devoted to policy and they do see themselves as policy makers.

Asked about delivery methods beyond training at board meetings,

Superintendent Sanders thinks time will always be an issue that must be overcome by dedication.

So even for like for online training at home at a convenient time and so forth I'm not sure that they would be able to do that. It's just dedication to what you're trained to do and even though I will give her the benefit of the doubt and I will keep working in that direction. There are definitely some people who are not cut out to be a trustee nor should be a trustee.

Superintendent Clark

Superintendent Clark is a male superintendent who has served several districts.

The bulk of his experience has been in small, rural districts. He has been in this current assignment for a couple of years. His experience working with schools and with boards in general has been fairly positive. "I had great board members in most places I've worked. In thirty years as a superintendent, administrator, I've only worked for one bad board and it was for only one year. I was remarkably lucky." Most of the board members he has worked with have been long-term trustees.

He thinks that training should be delivered to the local area either in person or by video conference. His trustees do not have the time to travel for training and there are other alternative deliveries that he thinks would work as well. Distance learning via the internet would also be a great help to get more people involved. Through his years, he has seen changes in school boards. "I think the difference I see in trustees is that they always

did it to serve the community. They believed in education; they believed in kids and they believed in service and the ones that we started to get after that, it wasn't about that; it was a political position. It is a power position." He went on to explain training and the changes that he sees in this area:

They were, they only cared about the kids and serving the community they lived in and that's the key. The training fallacy that I see is that if the motivation is wrong, you can't train that into them. I see some real fallacies; some of the board members that I had particular conflict here in . . . they did not respect me and they did not respect my position. You can't change that; the philosophy it's not trainable.

He went on to say that it is not only attitude toward training that is an obstacle to training. He said "If you have the answers, you don't need to be trained and that's the problem. They either had the answers already, and some of them firmly believed that. They're either too dumb to know that they don't know or too stubborn to accept the fact that there could be another answer."

Overall, Superintendent Clark believes that training can make or break a board because some trustees will not allow themselves to learn. "Because they don't understand their roles and responsibilities, they wanted to do the clerk's job, the superintendent's job and the football coach's job." He went on to say that training can only help if trustees utilize what they learn. "Training only changes the fact that they can do it, it doesn't change the intent and it doesn't make them a better board. They [trustees] need to come in with the belief that they're there to serve and then and only then can you train them. If they don't come in with that basic belief, you're whistling in the wind."

Regarding the Key Work for School Boards, Superintendent Clark said that he doesn't see trustees engaging the community for higher student achievement. His current

board doesn't even talk about student achievement. Their goal is to serve the union not to serve students. Superintendent Clark says that training an untrainable board is a superintendent's nightmare. "Sometimes training in board issues is because they are not trainable. They already have all the answers so why should they be trained."

He works with Trustee Welles who has only been on the board a short while. Overall, he does not believe that trustees want to be trained, especially by the Superintendent. "Some come in with the agenda to change the administration. They might run for the board because they have been told there needs to be a change. It takes a while to connect with some who come in believing you should go."

Summary

Twelve trustees and three superintendents in Montana were asked questions regarding their perceptions of training and development for school board members in this qualitative study. In regards to what specifically prepared trustees for board service, having children in the district or owning a business and/or having business background were more frequently given as the primary prior mode of preparation. Involvement in schools as a parent was listed nine times as preparation for service while owning a business and/or having business experience was cited seven times. Table 3 illustrates the trustee participant responses to preparation for school board service. The data reported are not non-duplicative as several trustee participants listed more than one response to this question.

Table 3: Prior Preparation for Board Service

<i>Prior Preparation for Board Service</i>	<i>Number of Times Mentioned</i>
Being a parent	Nine references
Owning a business/business background	Seven references
Talking with community	Six references
Knowledge of budgets/fiscal issues	Five references
Attending meetings	Two references
Educational degree/college experience	Two references
Volunteering in the schools	One reference
Ability to think independently	One reference

Locally developed and delivered training was the delivery method of choice of seven participants. Seven trustees believed that training and development for school board members was necessary while three did not believe that training was necessary and two were uncertain. Budget/fiscal training was the first choice of needed training and development according to six trustees. Nine of the twelve board members interviewed turned to their board chair or fellow trustees for training; two trustees looked to the district superintendent or administrative team. One trustee mentioned both the board chair and the superintendent as a training source.

Based on responses to detailed questions about Key Work for School Boards, trustees were placed on a Learning Stages Model to illustrate their disposition to board training and development. All of the subject trustees were placed in two of the stages on the matrix. Five of the twelve board members are situated in the Unconscious Incompetence sector; four trustees qualify for the category entitled Conscious Incompetence. The remainder of the twelve is between the two stages. There were no

trustees placed on the third or fourth stage of the learning model. Table 4 is a visual representation of the placement of all trustee participants on the Learning Stages Model based on their comments about training and development as well as their awareness of skills and knowledge standards for school boards as defined by the National School Boards Association. This placement represents their location on the Learning Model as of this study. As described earlier, participants can move back and forth on this continuum, but will not skip the stages. Regression as well as progression is a component of the Learning Stages Model. Awareness of the need for training as well as the acceptance of training causes forward movement along the Learning Stages Model.

Table 4: Learning Stages Model—Participants

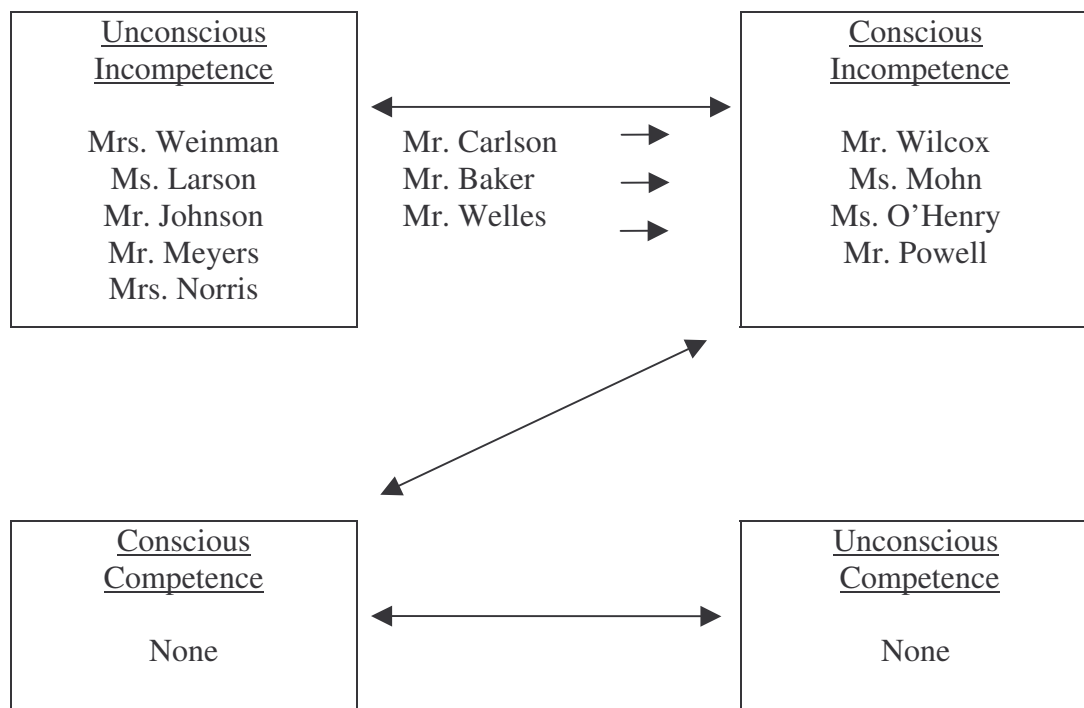


Table 5: Learning Stages Model

<i>Stage One: Unconscious Incompetence</i> Skill or Knowledge Level: Unaware of Deficiency of Skill or Knowledge Definition: Person is unaware of existence or relevance of skill or knowledge area; unaware of personal deficiency in skill or knowledge area; may deny relevancy or usefulness of skill and/or knowledge Confidence Level: Confidence exceeds ability. Overconfidence prohibits learning. Descriptive Comments: We don't know what we don't know. We are inept and don't know it,	<i>Stage Two: Conscious Incompetence</i> Skill or Knowledge Level: Aware of deficiency and seeking change through training Definition: Person is now aware of existence and relevance of skill or knowledge as well as personal deficiency in this area; aware that increased knowledge or skill will increase effectiveness; aware of training needed to increase effectiveness through training; and is committed to learn and practice to move to next stage. Confidence Level: Confidence drops as skill/knowledge deficiency is recognized. Failure may be a part of learning. Descriptive Comments: We know what we don't know. We start to learn when we become aware of our deficiencies.
<i>Stage Three: Conscious Competence</i> Skill or Knowledge Level: Proficiency with Concentration and Practice Definition: Person can perform the skill or apply the knowledge with concentration and practice. Although the person can demonstrate the skill to another, the person cannot teach another. The skill is not second-nature, but requires practice to move to the next stage. Confidence Level: Increases with ability. Learning requires practice. Descriptive Comments: We can do what we now know, but we need to practice and concentrate.	<i>Stage Four: Unconscious Competence</i> Skill or Knowledge Level: Mastery with Skill Demonstration or Knowledge application—Able to teach others Definition: Person can perform the skill without thinking about it. The skill becomes second nature. The person can perform the skill or apply the knowledge while doing other things. The learner can become the teacher at this stage. Confidence Level: Peaks with ability to demonstrate knowledge or skill. Skill becomes instinctive. Descriptive Comments: We can demonstrate without concentration.

The Learning Stages Model is a visual representation of a learning theory applicable to learning a new skill or acquiring new knowledge. Developed over thirty years ago by Dr. Thomas Gordon, this theory has been applied to many professions, avocations, hobbies, and life skills. Ideally, the learner would move through the learning model to achieve mastery. Learners move through the matrix one stage at a time. Progression is dependent on motivation and disposition to learning as well as opportunity to learn and practice. Learner cannot skip over any stage, but can regress to previous stages. In addition, learners can be stalled in any one stage or poised between stages. Continuous progress requires motivation, training, practice and application (“Conscious Competence,” 2003).

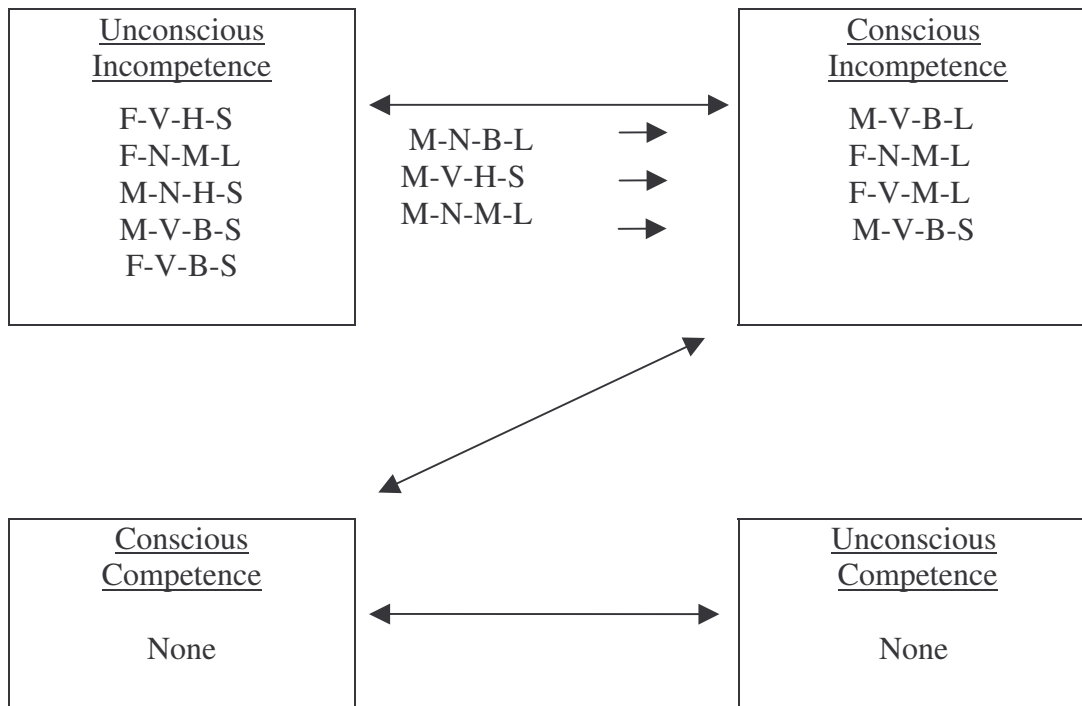
The Learning Stages Model can be viewed through many learning and development situations. For example, when a child is very young, that child may be unaware of the need for tying or for that matter wearing shoes. This instance could illustrate the first stage of learning—Unconscious Incompetence. There is no knowledge or awareness of needed skills and so no attempt to learn. As age and independence increases, the child may demonstrate interest in learning to tie shoes and experience frustration during attempts to do so. The child watches the parent demonstrate shoe tying and struggles with attempts to do for oneself. This is the Conscious Incompetence stage. The child becomes aware of skill deficiencies and tries to learn a new skill or task. Finally, success is achieved and although the process is arduous for the child, the child can tie shoes with concentration and practice. This is the Conscious Competence stage. The child can accomplish the task with concentration and practice. Continued practice

makes it easier and easier until the child can tie shoes without concentration, without looking and without even paying attention to the task; the child has progressed from no knowledge, to basic knowledge, to practiced proficiency to mastery. It is at this point that the child could begin to teach others. This is the stage of Unconscious Incompetence. The child can demonstrate the skill without having to think about it. The skill becomes a habit and the child can begin to teach others. Like this child, trustees can be categorized into learning stages based on Key Works by their attitudes and skill and knowledge levels.

Table 6 is a visual representation of the self-reported demographic characteristics of the trustee placements found in Table 4. The key to demographic categories is below:

F	Female	V	Veteran	H	H.S. Diploma	S	Small District
M	Male	N	Novice	B	Bachelor Degree	L	Large District
				M	Master Degree		

Table 6: Learning Stages Model—Demographics



From Table 6, the following observations can be made. There are five trustees in the Unconscious Incompetence stage and seven either moving towards or into the Conscious Incompetence stage. Describing the participants in the Unconscious Incompetence stage, there are more females than males, more veteran trustees than novice trustees, more trustees from small districts than from large districts and in comparison to the Conscious Incompetent stage, there is less educational attainment in the Unconscious Incompetence stage. Participants in the Conscious Incompetence stage include equal male and female trustees, more veterans than novices, more trustees from large districts than from small districts and greater educational attainment as compared to the Unconscious Incompetence stage. Combining the trustees who have moved beyond the initial Unconscious Incompetence stage, the follow observations are made. Of the seven out of twelve trustee participants who have made any movement along the training continuum, five are male, two are female; three are novices, four are veterans; one has a high school diploma, three have Bachelor degrees, and three have Master degrees; and five come from large districts while two come from small districts.

Trustees from small districts are more prevalent in the Unconscious Incompetent stage than in or moving toward the Conscious Competent stage. Conversely, five of the seven trustees who were engaged in training were from large districts. Also, the trustees who are seeking training have more education than those who are not seeking training. More men than women were moving along the training continuum in part because there are more men in the study. Two of the five females are progressing while five of the

seven males are progressing. Four of the seven veterans are moving through the training matrix and three of the five novice trustees are moving through the matrix.

Although the observations from this finding require further scrutiny, it could be helpful to examine the training opportunities offered in the districts of those trustees who are receiving training and progressing through the continuum of learning. Overall, there appeared to be no difference in experience or gender. Four of seven veteran trustees were making progress on the Learning Stages Model and three of five novice trustees were making progress on the Model. As to gender difference, the variance is only slight and appears to be unimportant as well. Five of seven males are progressing while two of five females are progressing. There is no other indication that either years of experience or gender helped or hindered movement on the Learning Stages Model. Education and size of district may have had bearing on the progress of participants, but these areas require further scrutiny as well. Those participants making progress through the Learning Stages Model had more education than those who were not making progress and of the seven making progress, five came from large districts. Conversely, of the five making no progress on the Learning Stages Model, four are from small districts and one is from a large district.

"But the history of science—by far the most successful claim to knowledge accessible to humans—teaches that the most we can hope for is successive improvement in our understanding, learning from our mistakes...but with the proviso that absolute certainty will always elude us."
Carl Sagan

CHAPTER 5

CONCLUSIONS, IMPLICATIONS AND RECOMMENDATIONS FOR FURTHER STUDY

Introduction

The literature review indicated that the school board as a collective entity appears to be a permanent fixture in the landscape of public education. However, roles and responsibilities of school boards have evolved and expanded and seem to be exponentially more complex and challenging than in previous times. The literature reviewed indicated that trustee effectiveness would improve with training and revealed that board members had expressed preferences for locally developed and delivered training. Also, the literature revealed that superintendents believed that trustees needed training in the roles and responsibilities of school boards. This study reinforced research about trustee effectiveness and training, locally developed and delivered training and superintendents' beliefs that trustees needed training in roles and responsibilities.

The problem examined in this study is the scarcity of research-based information about trustees' perceptions of training and development in Montana. In addition, no research was found examining Montana school board members' predisposition to training

and development or the impact of those attitudes on training. Lastly, there was no research literature that expressed preferences of Montana trustees in terms of training, i.e., where training comes from and who delivers it.

The purpose of this study was to gather data from Montana public school trustees and superintendents regarding their perceptions of training and readiness for school board members. Preferred methods of delivery for training and development, as well as who should be the primary instructor for training school board trustees was also examined. Working through the Learning Stages Model, a learning framework that describes dispositions towards training, this research provided data about the continuum of learning for school board trustee participants. In addition to assisting superintendents and school boards in making trustee training decisions, this research educated and helped to inform advocacy groups, professional associations, universities, and the public regarding training for school board members.

Conclusions and Implications

After analysis of data gathered during interviews with twelve trustees and three superintendents, answers to the research questions were compiled and conclusions and implications for practice were developed. These answers, conclusions, and related implications were created after examination of relevant research-based literature, careful preparation of a research plan with questions designed to explore the topic of trustee training, and a qualitative analysis of responses given.

Answering the first research question about trustee characteristics and preparation for board service, trustees and superintendents were asked questions about their perceptions regarding prior preparation. When asked what specifically prepared them to serve on the school board, nine trustees believed that being a parent, especially a parent involved in their children's lives, was the most important pre-service characteristic of a school board member. Because parents "know the problems already" and "can talk to teachers," the trustee participants perceived that being an involved parent is a logical complement to board work. If trustees are unable to traverse the unfamiliar landscape of educational jargon or complex educational assessments, parent-trustees are at an advantage because they know educators in the system who will help them according to trustees in the study. Trustees stated that being involved in schools as parents gives those educators the advantage of having personal access to educators and through them an insight to issues facing the district. Trustees also believed that being a parent gave the public better access to communicate with trustees at school activities and events where parents gather.

The implication arising from this finding is that if trustees believe that parental involvement gives them needed preparation for service, creating training opportunities that give trustees or candidates access to these venues may assist in training and development for trustees. One of the advantages expressed by participants was a connection to schools. This nexus between schools and trustees could be created for non-parent trustees as well. Schools could "adopt" trustees. Creating a special relationship with trustees may help in connecting trustees to schools in a meaningful way. In addition,

a principal mentorship could be created that would support trustees in their work.

Creating “town meeting” forums at schools could offer trustees access to the public to discuss their concerns and share their ideas.

Even though the literature pointed to business experience as being helpful to trustees, the participants in this study did not find business background to be more helpful than being an active and involved parent. In actuality, if trustee participants believed that being a parent was their sole qualification to assume the role of school board trustee, they are ignoring other aspects of training and stating that in reality, nothing prepared them for the roles and responsibilities of being a school board member. Through the lens of the standards of performance and skills needed to be a trustee, these participants were deficient in required skills and knowledge to be a trustee. Nothing in the realm of parenthood filled that gap or assisted them in moving along the Learning Stages Model from deficiency to proficiency. Citing that parental experience was in any way helpful in training further demonstrates their overall misconceptions about needed skills and knowledge to be a school board member.

To answer the second research question, trustees and superintendents both were asked what pre-service qualifications were needed for board service. Although trustees cited several items that they believed in some measure prepared them for school board service, at the time of their interview, trustees overall judged themselves ill-prepared to serve. Two of the twelve trustees believed themselves currently to be ready to accept and assume the responsibilities of board service. Others found that board service was not what they imagined. Two trustees suggested a pre-training or apprenticeship program

which would afford trustees training opportunities between the school board election and the date for assuming office. Montana law prescribes the date of the school board election and the date of taking office. In 2007, there will be seven working days between the election and the reorganization of the board.

The implication of the finding about pre-service qualifications and characteristics needed for effective board service is that there is a marked difference between perception and reality. Even if candidates believe that they are ready to assume the duties of school board service, after their term begins, they often find themselves deficient in the skills needed to serve as a trustee. Even with previous business experience which the literature described as helpful in charting the course for service on a public school board, these trustees did not find business experience as helpful as the attribute of being an involved parent. Greater awareness about the roles and responsibilities of board service should be shared in some manner with candidates so that they do not have the surprise of prior expectations not matching reality after election to the board. Because participants described themselves as “ill-prepared” or “naive about their expectations,” there needs to be an organized training program which ramps up the performance and knowledge immediately after the election as well. Two superintendents stated “Trustees aren’t up to speed for a year.” This amount of unproductive time is unacceptable. Creating a responsibility for outgoing trustees to assist incoming trustees or a mentorship between current trustees and incoming trustees could assist in the “long, steep climb to proficiency” described by study participants.

The other implication that arises from this finding is that there may be opportunities to change the election cycle through legislation so that candidates would be elected in May, but not take office until January. Carving out a training period by changing the election cycle and/or creating a training relationship with an existing or retiring trustee may assist in bridging the knowledge gap for new trustees. Maintaining the May election, but delaying the assumption of office until January would allow for essential training and pre-service training for newly-elected trustees. If allowed this time between election and taking office, state school board associations, superintendents and peer trustees could help prepare novice trustees through orientation and training.

Many training gaps were discussed during trustee and superintendent interviews with the researcher. Understanding school revenues and expenditures were areas that six of the participating school board members reported as personal skill or knowledge deficiencies. One trustee's remark about the complexity of school funding and budget was characteristic of the sentiment expressed by other trustees who expressed need for training in school funding and budget when he said, "School finance [revenue and expenditures] is so darned complicated!" The implication for this finding is that a significant number of trustees who have fiduciary responsibility for district school budgets judge themselves largely ignorant about the revenue process and expenditure procedures for school districts; therefore, additional training focused on fiscal areas is needed to train trustees and to increase their proficiency in this important aspect of school board work. Since workshops focusing on revenue and expenditures are already available to assist new trustees in becoming proficient at this important task, but trustees are not

taking advantage of this training opportunity because of a preference for locally delivered and developed workshops, new avenues of training need to be explored. In addition to expressing preference for local training because of time concerns, trustees also expressed preference for board chair delivered training. Since board chairs are not trained to be trainers in this complex material, this phenomenon must be further explored. Board chairs will have to become Unconsciously Competent in this material to become trainers. There was no evidence in the data gathered through interviews that this was the case. There was just a preference expressed for training by board chairs, but no explanation that they were the correct choice or even the prepared choice to deliver training material. If dispositions toward local training and training exclusively by the board chair cannot be changed, it is unlikely that this material will become available to trustees in a meaningful way. It is unlikely that volunteer board members, including chairs, will become proficient enough in this complex material to be able to instruct others.

Superintendents expressed a need for comprehensive training for trustees particularly in the area of roles and responsibilities for school board members. This concept was expressed in the literature review as well. Defining board roles versus superintendent roles were common training themes in the literature reviewed. Tensions over those roles has led to the trust issues facing many board members and superintendents today. As some board members expressed running for the board to change the leadership in the district, the tension between the two entities is inevitable. Understanding board roles may help to clarify this situation if consensus can be reached about this important topic. If the understanding or misunderstanding results from

differing views, that complicates this potential training topic as well. It is one thing to learn roles and responsibilities; it is another to accept them.

Conversely, trustees expressed the need for training in specific areas. Those areas included school revenue and expenditures, special education law, labor issues, and, curriculum. Implications about this finding demonstrate differences between needs for training as perceived by trustees themselves and the superintendents who have been educated to train trustees. Findings underscore the need for further dialogue between these two groups as well as other interested constituents interested in this topic. A method for blending these different approaches and topics or discovering an avenue to accomplish both goals needs further research.

The third research question dealt with trustees' predisposition toward training and development. Predispositions toward training and development varied by trustee and by previously self-reported demographic categories. Using Key Work of School Boards as the standard about what trustees should know and should be doing; the researcher assessed trustee participants' understanding of the work of trustees, and their training toward those standards and then placed the participants on a learning matrix. Responses about the need for trustee training overall were that seven participants thought training was important, three did not believe training was important for them, and two were uncertain about the value of training. While trustees in general were positive about the need for training, most trustees did not progress through the learning continuum from incompetence to competence.

The implication for this finding is that more training on the agreed upon standards for the knowledge and performance of school board members is necessary. School board members did not associate their work with the overarching goal to improve student achievement through community involvement. As this precept should be the goal of school boards, more training needs to be done and more awareness needs to be created. The disconnect between the work of school boards and increased student achievement should be analyzed further to determine the extent to which this finding is prevalent with other school board trustees. This finding about the disconnect between the work of boards and student achievement was not found in the research literature and is a new finding from this study.

Through the fourth research question, attitudes toward learning and the subsequent impact of those attitudes on learning were also examined through the filter of Key Work for School Boards as defined by the National School Boards Association. Utilizing responses given and attitudes demonstrated toward training and development, the researcher placed participating trustees on the Learning Stages Model. Utilizing comments made during interviews, the researcher determined the placement of each trustee. Trustees were placed in the Unconscious Incompetence and Conscious Incompetence stages or between these two stages. No trustees were placed in the Conscious Competence or Unconscious Competence stages.

The implications of this finding are two-fold. First, there is a clear implication that trustees are not progressing with any alacrity along the training continuum. Five of the twelve participants were so comfortable or overconfident with their present

knowledge and skill set that they did not progress out of the Unconscious Incompetent stage. These trustees were inadequately prepared for the role of board members as viewed through the lens of the Key Works knowledge and skill set standards. They did not seek training or perhaps even resisted it. They did not know what they did not know and appeared to be comfortable in that state. The remaining seven trustee respondents were making very slow progress toward fully understanding the job that they have already been elected to do as defined by the Key Works knowledge and skill standards established by the National School Boards Association. Second, attitudes toward training and predispositions toward learning should inform trainers in the field of the need to further motivate learners to learn, in part, by helping them recognize their deficiencies. Creating an awareness of the personal satisfaction and gain realized through training may help school board trustees embrace training and development. As one of the veteran trustee participants said, “The more I do this [school board service], the more I know that I need to know more!”

The fifth research question queried trustees and superintendents about who should deliver training. Trustees responded that they preferred and expected the board chair to be responsible for training. The research literature as well as established practice support training of school boards by the district superintendent. This theory of training delivered by the board chair is grounded in this research, but does not have a historic or research-based reference before this study. Strong preference expressed for training and development delivered by the board chair bears further scrutiny. Lack of interest expressed in training by superintendents also warrants additional study. Presumption of

this role by superintendents was assumed by the researcher but not borne out by the majority of participant responses. Implications for this finding include specialized training for board chairs to meet expectations of their peers in providing training for the remainder of the board. Training opportunities for superintendents to assist in process are implied as well. This finding has implications beyond training. If trustees expect board chairs to fulfill the need for training for the entire board, electing board chairs willing and able to fulfill this expectation and articulating this new mandate to the prospective chair are necessary. Electing trustees to be chair who have progressed through the Learning Stages Model to the stage of Unconscious Competence and are able to teach others is important. The finding of the lack of interest in training by superintendents implies a change in superintendent preparation. If superintendents are educated to be the trainer of board members, but are not being utilized in that manner, universities may need to reorganize superintendent preparation to reflect this finding and if deemed important, to change preparation procedures for superintendents.

The distinct preference for local training versus other options answered the sixth research question. This response was also prevalent in the research literature reviewed. Preferences for local training were mentioned in the literature because of the amount of time already devoted to this largely volunteer job. Seven of the twelve trustees valued training and development. Coincidentally, the same seven the trustees are moving forward in training and development. Seven respondents also expressed a strong interest in locally developed and delivered training opportunities. Citing the amount of time already spent in this volunteer endeavor, these seven trustees strongly prefer local

training opportunities for themselves and hoped that others would participate as well if given the opportunity. The implication for this finding includes training opportunities developed by local school districts and/or state school boards associations that must be delivered in local communities. The three superintendents interviewed also expressed the opinion that local training was the only delivery option that would work for the boards in their district.

Locally crafted and delivered training and development was the preferred method of all participants in this study. Trustees cited time constraints, relevancy of material and a relationship with the presenters as important reasons for choosing local training opportunities. Five trustees expressed interest in training to be held during meetings to diminish the extra time that would be required. Although online training was cited as a choice by one participant only, when asked about this delivery method directly, trustees expressed a specific interest in this medium for receipt of training and development.

There is an opportunity for the Montana School Board Association to offer training to trustees, but the data suggest that local delivery may be more widely accepted than training at a distance. Several of the trustees and all three superintendents cited time as a barrier to training. Adding travel to the time spent will be an additional barrier to training especially in a state the size of Montana. If training providers offer training in local districts, there may be an opportunity to train more trustees.

The three major conclusions discovered through this research that led to new theory grounded in the data include the phenomenon of the pre-service characteristic of being a parent as an asset to being a school board trustee; the lack of training and

movement along the Learning Stages Model and the preference of training presented by the board chair versus the superintendent. Although these theories would benefit from additional research, basis for arriving at this grounded theory is foundational in the data discovered through this qualitative study with twelve school board trustees and three superintendents in Montana.

Nine of twelve trustees interviewed stated that being an involved parent was an asset to their board service. This theory is grounded in the data presented through this study. Although participants mentioned access to other members of the public, access to educators who could guide them through the maze of educational jargon and current issues, there was no substantive explanation given for the characteristic of parenthood as a pre-service qualification or characteristic that prepared citizens for school board service. Further investigation of this phenomenon is necessary to further understand this belief held by participants in this study.

Although subject to the bias and subjectivity of the researcher, it appeared that most trustees did not progress along the continuum of training and development that is described in the Learning Stages Model. Placing participant trustees in a learning matrix from unconscious incompetence to unconscious competence found most of the trustees in the first two stages with the majority making little or no progress through the matrix. This finding coupled with a resistance to a nationally prepared program might indicate a lack of interest in training and development. This theory creates concerns about the value that trustees place on training and development, seeking it for themselves or finding the connection between training and trustee effectiveness. Seven of twelve trustees

interviewed believed that training and development was important, although the movement of trustees along the Learning Stages Model was minimal which belied their claim about the value of training.

The grounded theory that finds a beginning in this study is the dichotomy between the expectation of the superintendent being the primary instructor and the board chair seen as being the prime resource for training. This theory may find its basis in the trust relationship developed between trustees and the lack of relationship or lack of trust that may be a factor between school boards and superintendents. As the role of boards evolves in a new atmosphere of tension between local autonomy and federal and state regulation, more scrutiny needs to be borne on these important relationships. Perhaps the nature of elected officials receiving essential training from their employee needs examination. Examining the cause of this preference and further exploring the perceptions behind it will further illuminate this theory.

Recommendations for Further Study

This study focused on current trustees, but it could be helpful to survey school board candidates about training and development and to follow-up with the successful candidates after a year of school board service. A longitudinal study might provide useful data to assist candidates who become trustees and to assist superintendents and others who help in the transition from candidate to school board member.

Exploring the perceptions of past trustees could be an extension of this study as well. Knowing what individuals who have completed their service think about training

could assist in understanding, planning and implementing training for school board trustees. Exploring this topic with past trustees might discover a reflective perception of training of school board trustees from those who have previously served in that position.

Time commitment was mentioned as a barrier to training. The distance required in Montana to travel to a central location adds hours to the training experience, so it is unlikely from the responses received in this research that trustees are going to be willing to travel for training. Therefore, distance delivery training options could be another possibility for future research. Video-conferencing, online courses and/or correspondence courses could be explored as feasible alternatives to face-to-face training that is delivered locally.

Since the role of the board chair was noted in part as a preferred training resource, it would be helpful to explore that perception from the perspective of board chairs to determine if expectations match. Exploring the possibility of specific training for board chairs—the possibilities and the problems—could be another study topic.

Lastly, the perceptions of superintendents regarding their ideas for training and their perceived role in trustee training would be another possible research area. Discovering obstacles and opportunities for training from the superintendents' perspectives could assist in the understanding of the preference for training from the board chair and the facilitation of that training option.

Summary

Qualitative research techniques were used to explore the questions guiding this study about the perceptions of Montana school board members and superintendents

regarding training and development. Data from interviews, field notes, and journals were gathered from twelve trustees and three superintendents after an exhaustive review of research literature. Perceptions about training, including who should deliver that training, preferred delivery methods, essential qualifications and characteristics of school board members were explored during one-on-one interviews with the researcher and the study participants. This study contributed to the body of knowledge about the problem studied. Attitudes towards learning were investigated through the framework of Key Work of School Boards developed by the National School Boards Association. Determining trustees' knowledge about these standards of knowledge and performance assisted in determining trustees' predisposition to learning. Participants were then placed on a learning matrix entitled the Learning Stages Model which illustrated a continuum of learning.

Trustees identified being a parent as the prior experience which best prepared them for being a school board member. This same quality was described as an essential characteristic for all board members by nine of those interviewed in the study. Trustees described singular skills and knowledge areas as being important for training while superintendents stressed the importance of understanding roles and responsibilities for training and development for trustees. Roles and responsibility training was also a focus area in the research literature. Trustees and superintendents preferred locally developed and delivered training and development, which supported the literature research. The vantage point of training and development as described by the participants in the study supports local training done by trustee peers or leaders.

One new noteworthy theory coming from this research stems from the strong preference expressed for local training delivered by the board chair instead of the superintendent. While the research literature also supported local training, the literature as well as historical practice place the superintendent in the role of the trainer, not the board chair. Nine out of twelve trustee participants in this study looked to the board chair instead of the superintendent to receive training. This new theory may begin to explain the changing roles and definitions of school boards. Tensions between elected boards and superintendents are well documented in research literature, but not to the extent of displacing the superintendent in the role of the board trainer. Placing more credence in a volunteer peer over an education professional to deliver important training agendas reflect the lack of understanding or true appreciation for the complexities of the role of the school board. Whether the concepts of change theory and creating awareness for needed change come into play or whether issues of trust and relationship are at the heart of this new phenomenon, this theory must be examined further to offer more detailed explanation as well as solutions. It is unlikely that boards will seek or receive the training that they need if they rely on their volunteer peer members and leaders while ignoring the resources of the administration.

In addition, the theory of boards not matriculating through the Learning Stages Model was a central finding in this research. Overall, seven of the twelve trustees interviewed supported the value of training and development for school board members in Montana. While stating support for the importance of training, few were seeking instruction or moving along the Learning Matrix. Through the lens of the Work of School

Boards, trustees were queried about their involvement in or knowledge of these accepted standards of knowledge and skill of schools boards. Found as being overall deficient in the accepted standards of what a board should know and do, these trustees were not active in seeking training to fill their knowledge and skill gaps. They are not developing into proficient members of the board and are making only small and unhurried progress towards proficiency.

Grounded theory grew from the data gathered as presented in the findings and implications in the area of the preference of local training by the board chair rather than the superintendent and the relative lack of movement towards board proficiency through training at all. These new theories take root in this study and must be examined further to help understand these new observable facts and their implication for further research.

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APPENDICES

APPENDIX A

MONTANA CODE ANNOTATED §20-3-324

Powers and duties of Montana School Boards as detailed in §20-3-324.

Powers and duties.

As prescribed elsewhere in this title, the trustees of each district shall:

- (1) employ or dismiss a teacher, principal, or other assistant upon the recommendation of the district superintendent, the county high school principal, or other principal as the board considers necessary, accepting or rejecting any recommendation as the trustees in their sole discretion determine, in accordance with the provisions of Title 20, chapter 4;
- (2) employ and dismiss administrative personnel, clerks, secretaries, teacher aides, custodians, maintenance personnel, school bus drivers, food service personnel, nurses, and any other personnel considered necessary to carry out the various services of the district;
- (3) administer the attendance and tuition provisions and govern the pupils of the district in accordance with the provisions of the pupils chapter of this title;
- (4) call, conduct, and certify the elections of the district in accordance with the provisions of the school elections chapter of this title;
- (5) participate in the teachers' retirement system of the state of Montana in accordance with the provisions of the teachers' retirement system chapter of Title 19;
- (6) participate in district boundary change actions in accordance with the provisions of the districts chapter of this title;
- (7) organize, open, close, or acquire isolation status for the schools of the district in accordance with the provisions of the school organization part of this title;
- (8) adopt and administer the annual budget or a budget amendment of the district in accordance with the provisions of the school budget system part of this title;
- (9) conduct the fiscal business of the district in accordance with the provisions of the school financial administration part of this title;
- (10) subject to 15-10-420, establish the ANB, BASE budget levy, over-BASE budget levy, additional levy, operating reserve, and state impact aid amounts for the general fund of the district in accordance with the provisions of the general fund part of this title;
- (11) establish, maintain, budget, and finance the transportation program of the district in accordance with the provisions of the transportation parts of this title;
- (12) issue, refund, sell, budget, and redeem the bonds of the district in accordance with the provisions of the bonds parts of this title;
- (13) when applicable, establish, financially administer, and budget for the tuition fund, retirement fund, building reserve fund, adult education fund, non-operating fund, school food services fund, miscellaneous programs fund, building fund, lease or rental agreement fund, traffic education fund,

impact aid fund, interlocal cooperative agreement fund, and other funds as authorized by the state superintendent of public instruction in accordance with the provisions of the other school funds parts of this title;

(14) when applicable, administer any interlocal cooperative agreement, gifts, legacies, or devises in accordance with the provisions of the miscellaneous financial parts of this title;

(15) hold in trust, acquire, and dispose of the real and personal property of the district in accordance with the provisions of the school sites and facilities part of this title;

(16) operate the schools of the district in accordance with the provisions of the school calendar part of this title;

(17) establish and maintain the instructional services of the schools of the district in accordance with the provisions of the instructional services, textbooks, K-12 career and vocational/technical education, and special education parts of this title;

(18) establish and maintain the school food services of the district in accordance with the provisions of the school food services parts of this title;

(19) make reports from time to time as the county superintendent, superintendent of public instruction, and board of public education may require;

(20) retain, when considered advisable, a physician or registered nurse to inspect the sanitary conditions of the school or the general health conditions of each pupil and, upon request, make available to any parent or guardian any medical reports or health records maintained by the district pertaining to the child;

(21) for each member of the trustees, visit each school of the district not less than once each school fiscal year to examine its management, conditions, and needs, except trustees from a first-class school district may share the responsibility for visiting each school in the district;

(22) procure and display outside daily in suitable weather on school days at each school of the district an American flag that measures not less than 4 feet by 6 feet;

(23) provide that an American flag that measures approximately 12 inches by 18 inches be prominently displayed in each classroom in each school of the district, except in a classroom in which the flag may get soiled. This requirement is waived if the flags are not provided by a local civic group.

(24) adopt and administer a district policy on assessment for placement of any child who enrolls in a school of the district from a nonpublic school that is not accredited, as required in 20-5-110;

(25) upon request and in compliance with confidentiality requirements of state and federal law, disclose to interested parties school district student assessment data for any test required by the board of public education;

(26) consider and may enter into an interlocal agreement with a

postsecondary institution, as defined in 20-9-706, that authorizes 11th and 12th grade students to obtain credits through classes available only at a postsecondary institution;

(27) approve or disapprove the conduct of school on a Saturday in accordance with the provisions of 20-1-303;

(28) consider and, if advisable for a high school or K-12 district, establish a student financial institution, as defined in 32-1-115; and

(29) perform any other duty and enforce any other requirements for the government of the schools prescribed by this title, the policies of the board of public education, or the rules of the superintendent of public instruction.

APPENDIX B

SUBJECT CONSENT FORM FOR PARTICIPATION IN HUMAN RESEARCH AT
MONTANA STATE UNIVERSITY

Title: Subject Consent Form for Participation in Human Research at Montana State University

- B. Project Title: Training and development for Public School Trustees as Perceived by Superintendents and Trustees in Montana.
- C. You are being asked to participate in a study about training and development for public school trustees as perceived by superintendents and trustees in Montana.
- D. The reason for this research is to understand perceptions of trustees and superintendents in Montana about training and development. It is hoped that gathering data about this process will assist in providing better understanding of training and development for public school trustees and will assist all of those involved in this process.
- E. You were selected as a possible participant because you are a school board trustee or superintendent in Montana.
- F. If you agree to participate, you will participate in an interview about training and development. I expect that the time involved to complete this interview will not exceed an hour. A follow-up interview to further clarify your answers and my understanding of them may take an additional thirty minutes.
- G. There are no risks at all to you to participate in this study.
- H. Possible future benefits to you and to fellow educators and policy makers may be to better understand perceptions about training and development for public school trustees.
- I. There are no adverse consequences to you if you decide not to participate.
- J. There is no cost for this project.
- K. There is no cost to the participants except their time.
- L. If you have any questions that may help you in your decision, please contact Stevie Schmitz at 406-652-1069 or Stevie@bresnan.net
- M. Complete confidentiality will be observed for all of the participants of this study. All written information will be reported with no identification of the participants. All written information gathered will be kept in a locked file cabinet and all electronic information will be stored with password protection. No names or other identifiers will be used in the final report. No one but the researcher will have access to the confidential data gathered in this study. A summary of the compiled

information will be available at the Office of Educational Leadership when the study is completed.

- N. In the event your participation in this research directly results in injury to you, necessary medical treatment will be available. No compensation is available from Montana State University for injury, accidents, or expenses that may occur as a result of your participation in this project. Further information about this treatment may be obtained by calling Stephanie “Stevie” Schmitz at 406-652-1069.
- O. Any additional questions about the rights of participants can be answered by the Chair of the Institutional Review Board, Mark Quinn (406-994-5721). You can also contact Stevie Schmitz at 406-652-1069.

Return one copy to the Researcher at the Interview

Retain one copy for yourself

- P. AUTHORIZATION: I have read the above and understand the discomforts, inconvenience and risk of this study. I, _____, agree to participate in this research. I understand that I may later refuse to participate, and that I may withdraw from the study at any time. I have received a copy of this consent form for my own records.

Signed: _____

Investigator: _____

Date: _____

APPENDIX C

INTERVIEW PROTOCOL FOR SCHOOL BOARD TRUSTEES

Interview Protocol for School Board Trustees

Purpose of the interview:

To collect data from school board trustees in Montana about their perceptions of training and development and predispositions to training as well as from whom and how training should be delivered.

Preliminaries:

Researcher introduces self, explains the study, and ground rules for the interview.

Thank you for participating in my research study. I am asking your permission to tape this interview for the purpose of transcribing it for further analysis with your understanding that all information will be confidential. The recording will serve as an extension of my memory. If at any time you would like to stop the recording, please let me know. The audiotape will be destroyed after the study is finished and all information will be kept securely in my possession throughout the duration of the study. No one except me will know your identity. Today's date is _____. The time of this interview is _____ and for the purposes of confidentiality, this participant is identified as _____. Please interrupt me with any questions you may have as we go along. Do you have any questions before we begin?

Process:

The following process will be used during the interview.

- The interview will begin with a semi-structured interview. The participant will be given a brief description about Key Work and will be asked to questions about Key Work. Using open-ended questions, the researcher will probe into the participant's knowledge about the eight focus areas and then will place the participant on a learning theory matrix.
- After the semi-structured interview, the researcher will ask open-ended questions.

- The participant will be given as much time as needed to answer each question.
- When necessary, the researcher will ask clarifying questions to fully explore and understand the participant's answers.
- Throughout the interview, the researcher will summarize the answers to verify understanding.
- Field notes will be taken throughout the interview, distinguishing between the participant's response and the researcher's observations.

Demographic Information:

1. Please provide a biographical description of yourself, including education, employment history, and length of service on which school board (size of district and location).

Preparation for School Board Service:

2. How prepared do you believe you were when you began as a trustee?
 - a. What specifically prepared you for service?
 - b. What do you believe are essential knowledge and qualifications for trustees?
 - c. Do you think that trustee training and development is necessary?
 - d. Were there any areas in which you needed training? If so, what were they?
 - e. How did you fill that training gap?

Key Work of School Boards:

3. What is your familiarity with the Key Work of School Boards by the National School Boards Association?

- a. Do you believe that this document is relevant to your school board service? Why or why not?
 - b. Do you believe that there should be training on these Key Works for trustees?
4. Who assists you in training and development?
- a. Whose primary responsibility is training and development for trustees? Who is your source of information for issues?
 - b. What is your district's plan for trustee training and development?
 - c. What is your personal plan for training and development?
5. How is training and development delivered to trustees in your district? Which methods are utilized? Which methods do you prefer?
6. Is there anything else related to these topics that I have not asked you?

Closing statement on tape:

Thank you for participating. May I please have contact information in case there are further questions? In this and future conversations, you can be assured of complete confidentiality.

APPENDIX D

INTERVIEW PROTOCOL FOR SCHOOL SUPERINTENDENTS

Interview Protocol for School Superintendents

Purpose of the interview:

To collect data from school board trustees and superintendents in Montana about their perceptions of training and development and predispositions to training as well as from whom and how training should be delivered.

Preliminaries:

Researcher introduces self, explains the study, and ground rules for the interview.

Thank you for participating in my research study. I am asking your permission to tape this interview for the purpose of transcribing it for further analysis with your understanding that all information will be confidential. If at any time you would like to stop the recording, please let me know. The audiotape will be destroyed after the study is finished and all information will be kept securely in my possession throughout the duration of the study. No one except me will know your identity. Today's date is _____. The time of this interview is _____ and for the purposes of confidentiality, this participant is identified as _____. Please interrupt me with any questions you may have as we go along. Do you have any questions before we begin?

Process:

The following process will be used during the interview:

- The interview will begin with as a semi-structured interview. The participant will be given a brief description about *Key Work* and will be asked to assess trustee knowledge using this instrument. Using open-ended questions, the researcher will dialogue further about trustee's knowledge about the eight focus areas.
- The researcher will ask open-ended questions.
- The participant will be given as much time as needed to answer each question.

- When necessary, the researcher will ask clarifying questions to fully explore and understand the participant's answers.
- Throughout the interview, the researcher will summarize the answers to verify understanding.
- Field notes will be taken throughout the interview, distinguishing between the participant's response and the researcher's observations.

Demographic Information:

1. Please provide a biographical description of yourself, including education, employment history, and length of time served.

Preparation for School Board Service:

2. How prepared do you believe trustees are when they begin as a trustee?

Do trustees perceive a need for continued training in your opinion?

What specific areas of preparation did you observe?

- f. Were there any areas in which he/she needed training? If so, what were they?

Key Work of School Boards:

3. What is your familiarity with the Key Work of School Boards by the National School Boards Association? Do you believe that your board is familiar with this material?

- a. Do you believe that this document is relevant to trustee's service?

- b. Do you think that training should be provided on Key Works?

4. Who assists your board in training and development? What materials are used?

a. Whose primary responsibility is training and development for trustees? Who is your source of information for issues?

b. What is your district's plan for trustee training and development?

O. How is training and development delivered to trustees in your district? Which methods are utilized? Which methods do you prefer?

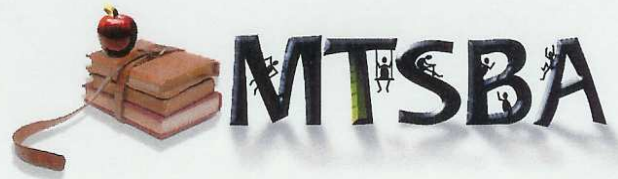
6. Is there anything else related to these topics that I have not asked you?

Closing statement on tape:

Thank you for participating. May I please have contact information in case there are further questions? In this and future conversations, you can be assured of complete confidentiality.

APPENDIX E

LETTER OF SUPPORT FROM MONTANA SCHOOL BOARDS ASSOCIATION



January 3, 2007

Dear School Board Trustee and Superintendent,

I am requesting your participation in a doctoral study being conducted by Stevie Schmitz, a former school board member from Billings. Under the direction of Dr. Joanne Erickson from Montana State University – Bozeman, Stevie is doing research on the perceptions of trustees and superintendents about professional development for school board members. Using the “Key Works of School Boards” developed by the National School Board Association as the foundation for school board training, this doctoral research will inform trustees and superintendents about the perceptions of professional development and training for school board members.

This interview will take about one hour of your time and responses will be kept anonymous. This information will be part of the doctoral research and dissertation of Ms. Schmitz and will benefit all of us as we are better informed about perceptions about school board member training.

Ms. Schmitz will be contacting you to set up an appointment for the interview. I appreciate your assistance and your cooperation in this important work.

Sincerely,

Lance Melton
Executive Director
Montana School Boards Association

APPENDIX F

LETTER OF INFORMATION AND INVITATION TO PARTICIPATE FROM
RESEARCHER

December 2006

Dear School Board Member,

I am looking for trustees who might be willing to participate in a research project. I am seeking input from both veteran and novice trustees about continuing education for school board members.

I am writing to ask for your assistance in a research study designed to assess the perceptions of Montana school board trustees regarding training and development. This research project is part of the requirements of my doctoral dissertation at Montana State University – Bozeman. When completed, I believe that this research will help to inform trustees, state associations, universities, and other interested persons or groups about continuing education for school board member in Montana.

My interest in this project stems, in part, from my years of service as a school board member in Montana. The variety and complexity of issues brought before the board prompted me to explore training and development opportunities for trustees in Montana and elsewhere. Specifically, I'm interested in trustees' perceptions about continuing education.

As part of my doctoral process in Education Leadership, this topic has captured my attention time and time again. Your responses in this interview will be kept strictly confidential. No identifying information will be used in the study. No one but myself will know your identity. I expect that the interview process will take approximately one hour of your time.

I am attaching letters of support from the Director of the Montana School Boards Association and the Director of the School Administrators of Montana. If you have questions about this project, you may contact my advisor, Dr. Joanne Erickson at Montana State University – Bozeman.

Please contact me at 406-652-1069 or 406-690-4722 or by email at Stevie@bresnan.net. I will try to contact you as well. I hope that you will be able to participate in this research project.

Sincerely,

Stephanie “Stevie” Schmitz

Attachments

APPENDIX G

LETTER OF SUPPORT FROM SCHOOL ADMINISTRATORS OF MONTANA



December 29, 2006

Montana School Superintendents,

I have become aware of a doctoral study regarding professional development for School Board members that is being conducted by Stevie Schmitz, former Chair of the Billings Board of Trustees during a portion of the time that I served as an administrator in School District #2. The study will utilize information from NSBA's Key Work project and analyze what Montana trustees need to know, how to train them based on their needs, and how to deliver this information.

In the near future, Stevie will be sending letters asking for your confidential support in interviews that she will be conducting this spring under the supervision of MSU's Dr. Joanne Erickson. She will be asking some of you about your impressions about trustee training and professional development! If you are contacted for participation, I would urge your support of this project that could go a long way toward meeting some of the significant needs that trustees and their hired administrators face in striving to work collaboratively in learning community leadership!

Sincerely,

Darrell Rud
Executive Director

APPENDIX H

LETTER OF PERMISSION TO USE KEY WORK FOR SCHOOL BOARDS
FROM THE NATIONAL SCHOOL BOARDS ASSOCIATION

January 24, 2007

Stephanie Schmitz
4107 Wells Place
Billings, MT 59106

Re: Permission to Use Key Work Surveys

Dear Ms. Schmitz:

The National School Boards Association (NSBA) grants you permission to use the Key Work surveys and other Key Work documents as part of your doctoral dissertation research at Montana State University. Any other use of this or other NSBA intellectual property requires separate permission.

When your dissertation is completed, NSBA may be interested in sharing your results with others in the public education community. In return for our cooperation with your research project, you agree to give NSBA the right of first refusal to publish or otherwise use your research results in whatever manner we deem appropriate to educate school leaders about the effectiveness of the Key Work model.

If you accept the conditions of this permission, please indicate by signing both copies of this letter and returning one to NSBA to my attention.

Thank you for your interest in the Key Work and we look forward to working with you.

Sincerely,

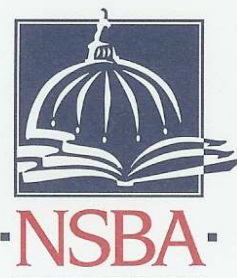


Richard J. Anderson
Associate Executive Director

Accepted by:


Stephanie Schmitz

1-24-07
Date



*Excellence and Equity
in Public Education
through School Board
Leadership*

National School Boards Association

1680 Duke Street ■ Alexandria, Virginia 22314-3493 ■ (703) 838-NSBA ■ FAX: (703) 683-7590 ■ <http://www.nsba.org>