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Unspoken Rules: Make your board's implicit rules explicit through a customs manual

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Unspoken Rules: Make your board's implicit rules explicit through a customs manual

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Unspoken Rules

*Make your board's implicit
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customs manual*

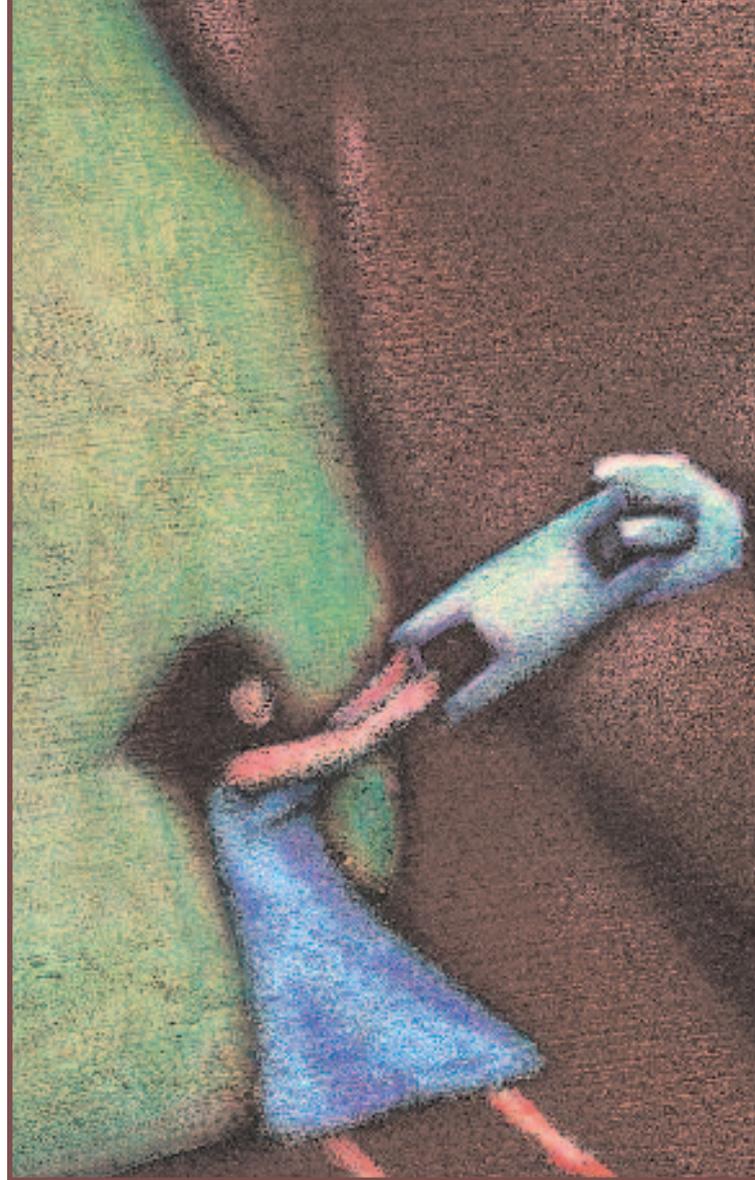
**Ronald Mendrick, Diane Reed,
and Michael Wischnowski**

Terry Fletcher was honored to be elected to her school board, but after a few meetings, she was feeling some anxiety over not “knowing the ropes.”

Before being elected, Fletcher attended many board meetings and carefully watched how the board conducted business. Further, she knew most of the board members and was pleased to be working with all of them. She saw herself as a sensible, educated, and active citizen interested in the welfare of students and taxpayers, and she wanted to fulfill her new role effectively, as soon as possible.

Nevertheless, after a few meetings as a board member, Fletcher realized that although a policy manual on district operations existed, there was no “how-to” manual for board members.

During meetings, she asked numerous questions about how the board conducted business. Her board colleagues were helpful, at first. Often, they cited traditions and practices without explanation. Sometimes they seemed to interpret her queries as if she were questioning the board's motives or judgment. When she got the courage to speak, the body language of the other board members indicated that she was breaking some rule that only they knew. As a result of these unspoken

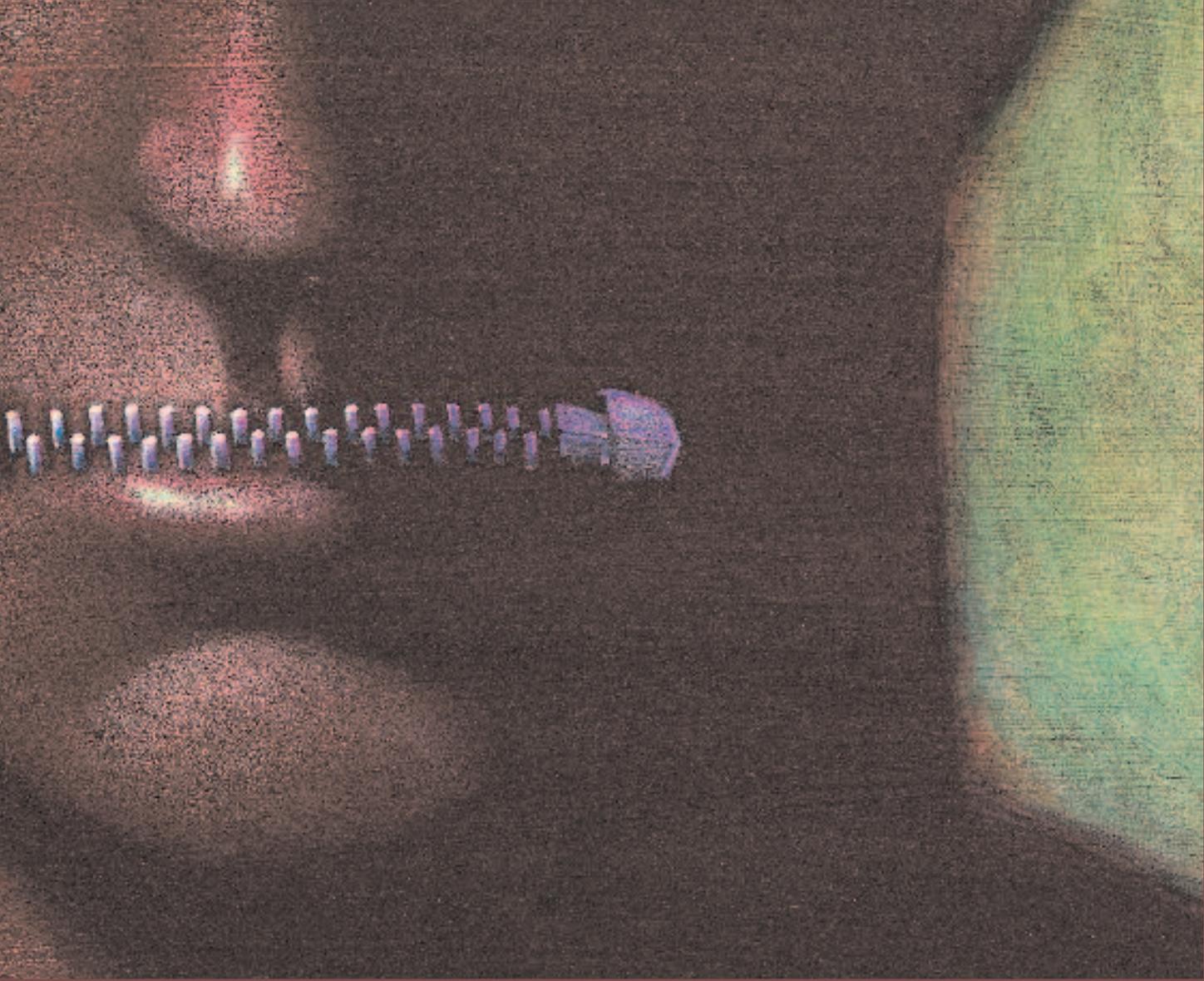


rules, Terry continued to feel like an outsider looking in.

Informal rules

Most groups—from book clubs to sports teams—abide by informal rules in addition to their formal policies and procedures. These implicit rules evolve into customs that group members are expected to observe as norms for behavior. Knowing the customs, procedures, traditions, and etiquette sometimes gives veterans in the group an advantage over newcomers. Many veterans promptly orient and mentor new group members. Some do not, either to keep their upper hand and control the group, or because they simply do not recognize that new members need to be brought into the loop.

As fictional board member Terry Fletcher illustrates, these sociological observations apply to a school board as much as to any other organized group. Although school boards are governed by federal, state, and local laws, they also evolve unwritten rules that become established customs over time. Sometimes it seems these implicit rules are passed down to each new board member only by a kind of osmosis. Too often, new members are expected to learn on their own through trial and error.



Some boards have decided to make their implicit rules explicit by articulating procedures, traditions, and board etiquette in written form as a manual. Bringing these rules to light leads to examination and clarification. Does a manual like this help the board work together as a team? Let's see what happened to Fletcher's school board after her first year as a member.

Implicit rule violations

During that year, Fletcher saw a conflict between implicit procedures and actions perceived as power plays. The conflict resulted in resentment, hidden agendas, and acts of revenge. This acrimonious situation continued for over a year, even though all the members knew what was going on.

It started during a meeting when a newly elected board member insisted that a matter be placed on the agenda: health insurance for domestic partners. The new member assumed that she could raise any topic at any time, but the board's implicit rules required agendas to be set in advance by the officers and that any proposed action be considered at two meetings before a vote. The new member had seen other matters raised in public session (without realizing they were put

on the agenda in advance) and insisted that it was "her right" to do so, too.

Several other members, including Fletcher, did not want to be forced to discuss such a sensitive topic without advance notice. However, Fletcher was unsure about the protocol in this situation, and there was nothing written anywhere to support or deny the new member's expectation.

A veteran board member disagreed with the new member, stating that agenda items should not be taken from the floor at a meeting, but should be raised through the established procedures. Another board member insisted that the matter be tabled until negotiations started with the employee unions because it might mean a change in employment benefits. These differences on the procedure for putting matters on the agenda became a conflict of power.

Eventually the matter was discussed at the meeting, resulting in a controversy in the community over sexual orientation issues. The board ultimately learned that it was prohibited by law from making such a unilateral change in benefits without first negotiating with its unions. In Fletcher's opinion, an explicit agenda-setting process could have clarified the whole situation and helped the board avoid the resulting discord.

Creating a customs manual

An upstate New York school board and superintendent worked together to create a customs manual. Resulting from conflict over inconsistent perceptions of the board's implicit rules, the document specifically articulates expectations for school board members and procedures for board meetings, agenda-setting, executive sessions, training, and leadership selection.

Expectations of School Board Members. After a preface that explains its intent, the manual highlights the characteristics that the board agreed make an effective board member. The list expresses the characteristics that the board values in its membership and anchors the document in the board's purpose, mission, and education law.

Standards of Governance. This section lists the steps for development of a board policy. The roles of the president and vice president are defined. There is a description of the steps in the development of board agendas and the conduct of meetings. Desirable channels of board communication to the public are described, with emphasis on confidentiality of student (and other private) matters. Board member orientation and training are also described.

The Board's Role in the Educational Program. The shared vision and mission of the district opens this section of the manual. The next section describes the process of developing a strategic plan for the district to achieve their vision and mission. Outlined explicitly are the learning outcomes for students and the measures that will ensure student success. The committee structure of the district is described here, as well as board member participation on those committees.

Administration and Personnel. The superintendent-board relationship is described in this section, as are procedures for hiring and evaluating the superintendent. Communication protocol among board members and the superintendent and staff is made clear here.

Fiscal Oversight. The procedures to meet the fiduciary responsibilities of the board are outlined in this section. The budgeting process for the district is described, especially board participation in budget building. The board's role and procedures for collective bargaining are delineated so that board members can appreciate and understand their participation in the negotiation process.

Community and Government Relations. Channels of communication with the public are discussed in this section. Communication etiquette at board meetings and the board's protocols for communication with the district are described. The process for board member involvement in influencing state and national legislation is also outlined in this section.

Other members agreed that they needed to create a manual of board customs.

Making a manual

Articulating, examining, revising, and reaching consensus on the established customs and procedures was healing and invigorating for board members. The manual cleared up some mysteries Fletcher had experienced, but it wasn't just the newcomers who benefited; all members were more informed about their roles and more effective in their decision making. Although conflict was not absent from subsequent board proceedings, Fletcher felt board members had the tools to deal with it and their responsibilities with greater confidence, understanding, and respect for one another.

One school board and superintendent in an upstate New York district have worked together to develop such a practices and procedures manual (see sidebar). Throughout the development of the procedures manual, the board worked with its school attorney to ensure that the document was consistent with federal, state, and local laws, regulations, and policies. When finished, the document was only 12 pages.

Maybe the greatest testament to the value of such a manual is its continued use. Board members report that the manual is an excellent resource for quickly reviewing customs and procedures. "It's a reference point for clarification when questions about customs arise," stated one board member. "It's like our contract with one another. We keep going back to it for our agreed-upon procedures, but we sometimes revise them by consensus, too." The manual is helpful in times of transition for new board members, superintendents, and board clerks.

A practices and procedures manual should be a flexible document. Boards should annually review the document to update it in light of changes in the law, school culture, and board operations.

The investment required to write a customs manual is well worth it, yielding great and ongoing dividends. The manual empowers board members to better execute their complex and honorable role in education decision making. ■

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