The Messy Reality of Boardsmanship; Dealing with the Challenge of Decision Making

THE SCHOOL BOARD DECISION-MAKING TEMPLATE

... a five-step template to guide decision making at the Board level

Most issues will never reach the Board; that's why they hire a Superintendent. If an issue does make it to the Board, the analysis process will help clarify whether the decision belongs to the Superintendent or the Board and accordingly, how to ensure the process is thoughtful and complete.

Neat and clean: "If it's strategic, it's a Board decision; if it's operational, it's the Superintendent's."

The messy reality: While issues that arise in international schools usually are primarily in the purview of either the Board or the Superintendent, some issues touch on elements of the roles of both. As the analysis step evolves, it can be useful to explicitly raise the question "Whose decision is it?" and come to an understanding whose decision it will be and why, and guide the decision-making process. For such issues, the analysis process can provide for a healthy "advisory" level input from each side of the Board-Superintendent partnership.

In any event, even if a decision belongs to the Board, the Board should carefully limit it's role to deciding the what, why, and how much (the ends), leaving the how, who, where, and when (the means) to the Superintendent.

Steps in Decision-making

1. **Identify the core issue**
   a. Apparent Issue _______________________
   b. Actual Core Issue _______________________
   b. Corollary Issues _______________________, _______________________

2. **Analyze the nature of this particular case**
   Most challenging issues are not simple to analyze, however, it can be useful to identify the predominant character of an issue in terms of the following 14 elements:
   a. Level of focus
      ____ Mission
      ____ Values
      ____ Policy
      ____ Regulations
      ____ Operations
      ____ Style
      ____ Communications
      Relevant clause _______________________________________________
      (explicitly state the wording from the document (Mission, Values, etc.) or brief description of the current practice that is relevant to the issue at hand, thereby establishing a common foundation of the analysis for all Board members)
   
   b. Validity of the "facts" provided in support of the proposal/complaint
      ____ Validity is certain (evidence is absolutely clear and credible)
Validity is probable (report is from unverified source; multiple reports; seems plausible)
Validity is not inherently evident (conflicting reports/evidence; unsubstantiated sources; very surprising)
Validity is doubted (lack of evidence; unreliable source; suspicion of ulterior motives)

**c. Legality**
- Clearly not a legal issue
- Aspects may be illegal but school not involved/liable
- Aspects may be illegal and school might be vulnerable
- Clearly illegal; school is vulnerable
- Not sure if legal issue or not

**d. Confidentiality**
- No confidentiality issue
- Not confidential issue but deliberations should be
- Conventionally confidential (personnel, contract, etc.; breach would be unethical)
- Highly confidential (breach would be disastrous)

**e. Public relations impact**
- Surefire positive PR for the school
- Potential opportunity for positive PR for school
- Probably not a PR issue
- If issue goes public, not good, but minimal damage to school/personnel
- If issue goes public, damage to school would be significant
- Already out there; serious damage to school is growing

**f. Complexity**
- Simple (straightforward, clear problem/solution)
- Complex but not complicated (many levels but fairly contained in scope)
- Complicated issue (many factors intertwined)

**g. Breadth and Depth**
- Focused on a very few discrete elements
- Extends across wide array of policies, operations, or people/institutions involved
- Straightforward - "what you see is what you get"
- Deep issue; reaches core elements of the school

**h. Prominence of issue and players**
- Obscure issue; no one really disturbed
- Many people involved/interested

**i. Influence of pressure group**
No lobbying anticipated
No lobbying apparent yet, but likely
Potential for pressure group action exists
Small but highly influential/powerful interest
Large, vocal, influential lobby
Pressure already being applied

j. Potential impact on future of the school/school's reputation
   Clearly would substantially enhance the school's reputation and standing
   Potential for enhancing the school's reputation
   Short-term impact only
   No likelihood of impact on the school's reputation
   Definitely will impinge on the school's reputation, warranted or not
   Would severely harm the reputation of the school

k. Human cost/benefits
   Many in the school community would benefit
   Some individuals would benefit; no harm to others
   Social benefit; the decision will be a trust-builder
   Some individuals might benefit, but at a cost to others
   The human cost would be only at the level of inconvenience, workload, disappointment, etc.
   The human cost would be significant; life-changing
   Social cost; the decision will be a trust-breaker

l. Financial cost/benefits
   Significant benefit to the school's finances
   Some financial benefit potential
   Low/no-cost issue
   Costly but funds available
   Costly (immediate and/or recurrent) and no funds currently available

m. Timing
   Can be deferred (until when?)
   Need for immediate decision but rollout not urgent
   Urgent!

n. How disruptive?
   Minimally disruptive
   Issue itself not disruptive but resolution might be
   Disruption might occur if no action soon
   Disruption has already started

3. Decision-making process
a. Resources/Channels available to determine the facts:
   ____ Reports from the administration (including staff, as determined by the superintendent)
   ____ Outside consultant (lawyer, government official, consultant, etc.)
   ____ Conduct a "hearing"
   ____ Direct the Superintendent to investigate further
   ____ Establish a specific Board Task Force and give it an explicit assignment

b. Basis for Resolution
   ____ Mission, Core Values, & Philosophy
   ____ Policy
   ____ Administrative Regulations/Procedures
   ____ Precedence
   ____ Compassion
   ____ Political
   ____ Other (whatever basis is used, it should be explicitly identified)

c. Right vs Wrong or Right vs Right?
   ____ Right vs Wrong (usually easier)
   ____ Right vs Right - use the Institute for Global Ethics "Four Way Test"
      [Is the decision legal?] *NOTE: "LEGAL ≠ ETHICAL
      [Does it "smell" bad; what's the gut feel?]
      [What if it were reported on the front page of the newspaper?]
      [What would mom say?]

d. Consider multiple solutions/responses
   ____ Feasibility of each
   ____ Known consequences of each
   ____ Potential consequences of each

e. Intra-Board conflict
   ____ Identify and weigh the impact, positive or negative, of the process of reaching a decision on the working relationships among Board members and Superintendent and the ongoing effectiveness of the Board
   ____ Ensure that the Board resolves any intra-Board conflict, either as it erupts or after all has calmed down

4. What to do

a. Decide
   ____ Agree on method of decision (consensus, vote, chair decides, referendum, etc.)
   ____ Decide!
   ____ Agree on wording of a statement of resolution
   ____ Minute the resolution verbatim

b. Make a plan
   ____ The Board decides the ends (what, why, and how much) unless further Board
action is required
   ____ The Superintendent decides the means (how, when, who, and when)

c. Execute the Decision

d. Communicate... Communicate... Communicate!
   ____ What will be communicated to whom through what channels
   ____ Who is responsible
   ____ When

e. Take appropriate action to prevent/prepare for the next time
   ____ Policy changes needed
   ____ Administrative Regulations needed
   ____ Other protocols needed

5. What else? (to be done "after the waters calm")

   a. Evaluate effectiveness/impact of what the Board did or did not do
   b. Review how the Board conducted itself - lessons learned?
   c. Ascertain accountability and culpability; take remedial action
   d. Ensure that the trust and working relationship within the Board, with the administration and staff, and in the community was sustained. If not, address it. After all is said and done, the working relationship must be maintained
THE SCHOOL BOARD DECISION-MAKING WORKSHEET

1. **Identify**  
   Core Issue ____________________________________  
   Corollary Issues ____________________________, ____________________________

2. **Analyze the nature of this particular case**  
   a. Level of focus  
   b. Validity of the facts supporting the proposal/complaint  
   c. Legality  
   d. Confidentiality  
   e. Public relations impact  
   f. Complexity  
   g. Breadth and Depth  
   h. Prominence of issue and players involved  
   i. Influence of pressure group  
   j. Potential impact on future of the school/school's reputation  
   k. Human cost/benefits  
   l. Financial cost/benefits  
   m. Timing  
   n. How disruptive?

3. **Decision-making process**  
   a. Resources/Channels to determine the facts  
   b. Basis for response  
   c. Right vs Wrong or Right vs Right?  
   d. Consider multiple solutions/responses  
   e. Intra-Board conflict?

5. **What to do**  
   a. Decide  
   b. Make a plan  
   c. Execute it  
   d. Communicate  
   e. Take appropriate action to prevent/prepare for the next time

6. **What else? (to be done "after the waters calm")**  
   a. Evaluate effectiveness/impact of what the Board did or did not do  
   b. Review how the Board conducted itself - lessons learned?  
   c. Ascertaining accountability and culpability; take remedial action  
   d. Maintaining trust and working relationship with administration and within Board

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