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## An Analysis of Orientation for New Board of Education Members in Selected School Districts of DuPage County, Illinois

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AN ANALYSIS OF ORIENTATION FOR  
NEW BOARD OF EDUCATION MEMBERS IN SELECTED  
SCHOOL DISTRICTS OF DU PAGE COUNTY, ILLINOIS

BY

DREW J. STARSIK

A DISSERTATION SUBMITTED TO THE FACULTY OF THE  
SCHOOL OF EDUCATION OF LOYOLA UNIVERSITY OF CHICAGO  
IN PARTIAL FULFILLMENT OF THE REQUIREMENT FOR THE  
DEGREE OF DOCTOR OF EDUCATION

JANUARY, 1982

AN ABSTRACT OF THE DISSERTATION OF  
Drew J. Starsiak for the Doctor of Education  
degree at LOYOLA UNIVERSITY OF CHICAGO  
JANUARY, 1982

TITLE: AN ANALYSIS OF ORIENTATION FOR NEW BOARD MEMBERS IN  
SELECTED SCHOOL DISTRICTS OF DUPAGE COUNTY, ILLINOIS

Major Professor: Dr. Melvin P. Heller

Purposes

The purposes of the study were: (1) to determine for what responsibilities should new board member be trained; (2) to determine what opportunities and resources were available for orientation of new board members during the first crucial months of membership; (3) to determine who was responsible for the present orientation of new board members; and (4) to determine how existing orientation programs could be improved to relate to the responsibilities new board members undertake.

Procedures

Following a review of related literature to determine the most accepted responsibilities of board of education members a survey instrument was developed, validated by a jury of experts, and sample tested by new members of a board of education. The survey was mailed to all forty-five public school districts in DuPage County, Illinois. Nine school districts were selected by a random stratified selection method in which to conduct personal interviews with the superintendent and new board members with an aid of an interview guide. The data obtained from these sources were compiled and analyzed.

Findings and Conclusions

Based upon an analysis of the data generated by the survey and personal interviews, the following findings and conclusions are reported: (1) the boardmanship responsibilities identified from the literature are considered important by superintendents and new board members and are utilized by a majority of school districts surveyed as orientation topics; (2) formal orientation programs for new school board members are not directly related to the type, size, or wealth of a school district; (3) fewer than half the school districts in DuPage County, Illinois, provide orientation for new school board members through local programs and/or the state school board association; (4) the resources utilized for orientation varied among the school districts; (5) the length of service of a new board member was not important in determining the most helpful resources utilized for orientation; (6) the superintendent was identified by all new board members as the planner, implementor, and responsible for new board member orientation; (7) orientation programs were based minimally upon administrative functions; (8) methods used to orient new board members were common to a majority of school districts surveyed; and (9) orientation programs identified in the literature were similar to existing orientation programs utilized in the districts studied.

## ACKNOWLEDGMENTS

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Also, a special note of appreciation is extended to Gerald Glaub, director of communications for the Illinois School Board Association, who provided the author ideas and information concerning the topic of this study, and to the twenty-seven school board members this author has had the pleasure to serve during the last five years for their understanding and encouragement in completing this dissertation.

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Finally, the author will always be grateful to the late Harold K. Thompkins, the author's former mentor, friend and colleague, whose encouragement and advice led the author to the superintendency and to the topic of this study.

## VITA

Drew J. Starsiak was born in Chicago, Illinois on February 9, 1946. He received his elementary education in the Chicago Public Schools and parochial schools. He graduated from Fenwick High School in Oak Park, Illinois in 1964. He received a Bachelor of Science degree in Biology from Loyola University, Chicago, Illinois in June, 1968; and a Master of Education degree in Educational Administration and Supervision was confirmed from the same institution in June, 1972.

He began his teaching career in August of 1968, at the Public Elementary School District 80 in Norridge, Illinois, where he taught science for five years. In July, 1973, he served as an administrative intern as assistant to the superintendent, at Elementary School District 13, Bloomingdale, Illinois. From July, 1974 until June of 1976 he served as principal of the Karel Havlicek Elementary School at North Berwyn Public School District 98, Berwyn, Illinois. Since July of 1976 he has served as superintendent of schools at Palisades Community Consolidated School District 180, Burr Ridge, Illinois.

The author is married to the former Julie Ann Kaptena and has two children; Heather Ann and Megan Ann.

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CHAPTER I  
INTRODUCTION

Public school boards of education throughout the United States have the responsibility of operating public school systems which have grown in size and complexity during the last two decades. Considering that nationally and collectively school boards and their members spend millions of hours on board business, spend at least fifty billion dollars of the taxpayer money, and are accountable for the education and welfare of millions of school children, the orientation and training programs for new school board members should be well developed. But as recently as 1978 the National School Board Association conducted an extensive survey on boards of education, including the orientation process. In what the research report terms, socialization, the final stage of a process in which new board members become experienced, the report states:

During this period, which lasts about a year, school board members progress from "apprentices" to experienced decision makers. During this time they undergo some form of training or orientation process, either formal or informal. Again, this process varies greatly in some areas, it is unstructured and almost non-existent, while it is an intensive, highly systematic process in other districts.<sup>1</sup>

The literature reveals that as late as 1969 the orientation process of new board members consisted of mainly local level programs.

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<sup>1</sup>Paul Blanchard, New School Board Members. A Portrait Research Report 1979-1 (Washington, D.C.: National School Board Association, [1979]), p. 1.

Hand them the board policy manual, a copy of the school regulations, maybe minutes from past board meetings, and be certain to include wishes for good luck in their new positions. Sounds familiar? Too familiar, according to a survey of school board orientation practices show that a majority of new school board members have not been trained well, if at all, to assume their duties.<sup>2</sup>

The same holds true for today's newly elected board members as reported by the National School Board Association's Research Report 1979-1:

An extensive examination of school board training and orientation practices uncovers a significant finding: school board members rely most on individuals within their own districts - specifically upon experienced board members and superintendents - for their training and orientation. Moreover most board members report it takes them at least a year before they feel capable and comfortable as a board member.<sup>3</sup>

Noting that the National School Board Association has placed some study emphasis on orientation of new board members recently, a review of literature shows the development of a rationale for orientation of new school board members basically stressing the necessity for orientation because: one, the future of lay control of public education rests with knowledgeable board members; two, manipulation of new board members by the professional school staff to fit the existing educational establishment produces board members ill fit to serve a community; three, orientation is necessary to shorten the time period from being a new board member to an effectively functioning board member; and four, educational issues have

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<sup>2</sup>John Francois, "Better-Lots Better-Training is Needed for New Board Members and How" American School Board Journal 158 (July 1970): p. 9.

<sup>3</sup>Blanchard, New School Board Members, A Portrait Research Report 1979-1, p. 3.

become more complex, thus the role of a board member more complex. With educational issues becoming ever more complex the functions of boards of education have changed, and thus the role of the board members.

Problems related to the role of the board, the objectives of public education, communication, and finance have traditionally been most numerous. In recent years integration, rising pupil populations, inflation, professional negotiations and unrest of students, faculty and the community have been additional concerns of great magnitude.<sup>4</sup>

Thus, this study was undertaken in order to determine the present boardmanship needs for orientation and how these needs were met in an educational complex which has rapidly changed. The study was planned to provide answers to the following questions:

1. For what responsibilities should new board members be trained?
2. What opportunities and resources were available for new board members during the first crucial months or years for orientation?
3. Who is responsible for the present orientation of new board members?
4. How can existing orientation programs be improved to relate to the responsibilities new board members undertake?

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<sup>4</sup>Deighton, Lee C. (ed.), Encyclopedia of Education, Vol. 8, "School Boards," (New York, N. Y.: Macmillan Co., 1971), p. 77.

STATEMENT OF THE PROBLEM

What are the present boardmanship needs for orientation of new board members in selected school districts in DuPage County, and how are these needs met?

PURPOSE OF THE STUDY

The study had three major purposes:

1. To identify from the literature the most accepted responsibilities of boards of education and to determine what consistent methods were used to orient new board members for these responsibilities.
2. To identify and analyze actual practices used in DuPage County to orient new board members toward the most accepted responsibilities of boards of education.
  - 2a. To identify the major responsibilities of boardmanship facing new board members in terms of orientation.
  - 2b. To identify and analyze the actual methods used for orienting new board members.
  - 2c. To identify and analyze the orientation sessions given at the local, state, and national levels and determine the extent to which new board members utilize these orientation sessions.
  - 2d. To determine and analyze who took the major respon-

sibility for orienting new board members for the identified aspects of boardsmanship.

3. To analyze the relationship between the actual practices in selected DuPage County, Illinois school districts and the literature for orienting new board of education members. In addition, national, state and local boards of education and superintendents could benefit from an analysis of the relationship between existing orientation practices and what the literature suggested about orientation.

#### DEFINITION OF TERMS

##### Board of Education

Those local boards in Illinois elected in accordance with the laws of the state to provide and direct public elementary and/or secondary education within a given school district.

##### Boardsmanship

The art and/or skills necessary to work and operate as a member of a board of education.

##### New Board Member

For the purposes of this study, a board member duly elected or appointed (in the case of a vacated seat) who has served less than two full years on a board of education.



### Orientation

The processes, communication, information and activities which are intended to assist the new board member to perform the duties as a board member more effectively. The term orientation is synonymous with "inservice training" and "inservice."

### Elementary District

A school district under a single board of education which provides public education for resident children from kindergarten through eighth grade.

### Secondary District

A school district under a single board of education which provides public education for resident children from grades nine through twelve. This type of school district is also commonly referred to as a "high school district."

### Unit District

A school district under a single board of education which provides public education for resident children from kindergarten through grade twelve.

## LIMITATIONS OF STUDY

The study had the following limitations:

1. The population of 45 school districts in DuPage County represents only 5% of the school districts in Illinois. Nevertheless, DuPage County school districts and school

boards represent one of the most populous counties in Illinois and in the United States. The structure of the school districts includes unit, elementary, and high school districts.

2. For the purpose of data collection relative to the orientation of school board members, the study did focus on board of education members with less than two years of experience.
3. The weakness of obtaining data through the use of the personal interview technique.
4. A similar study has been proposed and this study differs as follows:
  - a. The population studied will be DuPage County.
  - b. The structure of the school districts was composed of elementary, high school, and unit districts.
  - c. The study focused on orientation of new board members and the training received by members during this orientation period.

#### METHODS AND PROCEDURES

The outline that follows describes the procedures which were utilized to complete this study.

1. The literature was reviewed to ascertain the most accepted responsibilities of boards of education, particularly as

revealed in state school board association literature. The most noted responsibilities were listed in a survey. Board members chosen for the study were surveyed to rank the listed responsibilities of board members and rank the importance of the responsibilities.

2. A survey was developed and submitted to a jury of experts in the field of school administration for their recommendations. The persons serving on the jury were asked to evaluate the survey instrument as to content validity, and to revise the survey in any manner.
3. The survey instrument was revised according to the suggestions received from the jury and then submitted to a trial run on a sample of new school board members. Further revisions were made on the survey from the trial run with the author's board of education in DuPage County.
4. The survey was sent to the remaining forty-four school districts in DuPage County to ascertain from new school board members and superintendents a ranking of responsibilities and importance of board members' responsibilities, and what methods were used to orient new board members toward the identified responsibilities. Demographic data on the school district's size, wealth, boardsmanship experience, board affiliation with other organizations, and personal data on new board members were gathered.

5. From the initial survey those school districts that had orientation programs for new board members, three elementary, three high school, and three unit school districts were randomly selected as the study sample.
6. Personal structured interviews were held in the identified selected school districts with new board members and the district superintendent to gather and substantiate data for adequate comparison and meaningful contrasts for purposes 2a, 2b, 2c, 2d, and 3.
7. The actual practices of orienting new boards and the rank identified responsibilities of boardsmanship from new board members were compared to the literature.
8. Board member orientation needs as identified from the structured interviews were compared and analyzed to the board members' expectancies and actual orientation practices to determine if the type of orientation program experienced met the stated needs of the new board members.
9. The data collected from the surveys and personal interviews were tabulated and analyzed narratively as follows:
  - 9a. The ranked responsibilities of board members most consistently recommended in the literature was used as the structure for comparing and contrasting the actual methods used by boards of education in orienting new board members toward these responsibilities.

A descriptive analysis of similarities and differences between what existed and theoretical descriptions further revealed reasons for the existence of consistencies and discrepancies.

- 9b. Data were obtained from personal interviews of new board members and district superintendents to determine the extent of consistencies and discrepancies among the random sampled districts on the actual methods used for orientation, at what level, local, state, or national, orientation took place, and who had the major responsibilities for orienting new board members.
- 9c. From the personal interviews the stated orientation needs toward the identified functions of "boardsmanship" from new board members were analyzed by comparison against actual orientation sessions attended, board member characteristics of age, length of service, educational level, occupation, reason for board membership, and demographic data of school district.
10. The findings from the data were then analyzed in relation to selected administrative functions of an organization. Nine administrative functions of the sixteen developed by Stephen J. Knezevich were utilized as administrative

functions of an organization. The functions that were used were anticipating (planning), programming, organizing, staffing, resourcing, executing, coordinating, communicating, and controlling. These functions were compared to data gathered from new board members and superintendents in an effort to determine if the methods of orientation used were based upon those commonly accepted administrative functions.

11. The findings from the data, when compared to the nine commonly accepted administrative functions, were analyzed in terms of trends, common elements, patterns, relationship of activities, uniquenesses, and differences to identify implications for local school boards, the Illinois School Board Association and the National School Board Association in terms of orienting new school board members toward the identified responsibilities.

SUMMARY

The overall purpose of this dissertation was to determine the present boardsmanship needs for orientation of new board members from the literature, from actual practices, and to analyze the relationship between actual orientation practices and the literature within the framework of accepted administrative functions.

As public school systems have grown in size and complexity during the last two decades, commensurately so has the job of being a public school board member. This study can be beneficial to national, state, and local boards of education in understanding the relationship between what the literature and new board define as orientation needs and commonly accepted administrative functions of an organization. In addition, the study provides a synthesis of current methods of orientation being used to train new board members and what the literature suggests about orientation. This synthesis when analyzed in the framework of commonly accepted administrative functions, and other data gleaned from the study, could be of tremendous assistance to national and state board organizations, local boards and superintendents as they develop or refine orientation programs for new board members.

The first chapter has discussed the importance of the study, stated the problem and purpose of the study, defined terms and limitations of the study, and outlined the methods and procedures in conducting the study.

Chapter II, "Review of Related Literature," presents a review of related research and literature in the field of school boards, their functions

and responsibilities, and secondly, orientation needs as defined by national and state school board associations.

Chapter III contains a complete description of the methods and procedures which were followed to complete the study.

Chapter IV contains the presentation of data.

Chapter V contains the analysis of data.

Chapter VI contains the conclusions, summary, and recommendations of the study.



## CHAPTER II

### REVIEW OF RELATED LITERATURE

The overall purposes of this dissertation were to identify from the literature the most accepted responsibilities of boards of education and determine what consistent methods were used to orient new board members for these responsibilities; to identify and analyze actual practices to orient new board members toward the most accepted responsibilities of boards of education; and to analyze the relationship between actual orientation practices and what the literature suggested about orientation practices.

Orientation of new school board members has been examined by various writers and school board associations pertaining to boardmanship responsibilities, perceived needs, and methods of orientation. The literature concerning orientation methods for new school board members was limited. There was, however, much evidence in the literature of the growing need for better prepared and more knowledgeable board members to meet the challenges of boardmanship responsibilities.

Various writers have examined the orientation of new school board members and have proposed views pertaining to board member responsibilities, the orientation process and the methods used to orient board members. Writers proposing views on board member responsibility date back to 1926 while more recently writers have examined the orientation process and methods used to orient school board members. Thus the writers have

provided a framework for analyzing the literature pertaining to this topic into three sections which were developed to answer the questions posed by this study.

In an effort to achieve the purposes of this dissertation, this chapter, Review of Related Literature, is organized into three different sections. The first section, Responsibilities of Boards of Education, reviews the literature to determine the most accepted responsibilities of boards of education. The second section, Studies Concerning Orientation for Board Members, reviews the literature pertaining to the orientation. The third section, Methods to Orient New Board Members, reviews the literature to determine what methods were suggested as practices used to orient new board members.

#### RESPONSIBILITIES OF BOARDS OF EDUCATION

If new board of education members are expected to function effectively on a board of education, their responsibilities should be well known. New board members, in addition, need a broad and detailed knowledge base from which to operate. Since board members nationally and collectively spend at least fifty billion dollars of taxpayers money and are accountable for the education and welfare of millions of school children, the new board members' knowledge of their responsibilities would be a reasonable assumption to make, if board members are to function effectively. However, as recently as 1978, a survey by the National School Boards Association suggested that new board members realized after taking office that the responsibilities ex-

pected were not the responsibilities they actually experienced.<sup>1</sup>

This 1978 survey revealed that board members actually dealt with responsibilities in the areas of school finance, curriculum and textbook selection, collective bargaining, hiring administrators, personnel practices, facility planning, transportation, declining enrollment, and discipline.<sup>2</sup>

A previous survey conducted for the National School Boards Association by Dr. Milton Snyder in 1973, focused on methods of orientation but part of the study listed training priorities in terms of board member responsibilities.

Besides the responsibilities listed in the above mentioned 1978 report, the Snyder study listed the following additional responsibilities new board members dealt with: working relationship with the superintendent, establishment of educational goals and broad program goals, evaluation of educational programs, educational planning, community relationships, accountability, policy development, professional staff development, legal responsibilities, minority needs and participation, public communication, research and development for education, student-school relationship, legislative relationships, role and function of advising committees, community policies, and facility maintenance.<sup>3</sup>

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<sup>1</sup>Paul Blanchard, New School Board Members - A Portrait Research Report 1979-1 (Washington, D.C.: National School Board Association, [1979]), p. 4.

<sup>2</sup>Ibid., p. 5.

<sup>3</sup>Milton L. Snyder, Training New School Board Members: A Survey-Research Report 1973-2 (Washington, D.C.: National School Board Association, [1973]), p. 5.

Numerous state school board association booklets, programs, reports and studies revealed a commonality of school board responsibilities. The literature of the following state school board associations - Michigan (1972), Texas (1975), New Jersey (1974), Washington (1975), California (1975), Oregon, Iowa (1974), and Illinois (1979) revealed the following responsibilities board members should have knowledge of: working relationship with superintendent, evaluation of personnel, community relations, school finance, policy development and evaluation, knowledge of instructional program, selection of superintendent, school board operation and organization, legal responsibilities and authority, personnel practices, collective bargaining, facility planning, staff relations, and interpersonal relationships.<sup>4</sup>

Besides the responsibilities school board associations relegated to the role of board members in the operation of a school district,

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<sup>4</sup>Michigan Association of School Boards, Boardmanship in Brief: A Handbook for Michigan School Board Members (East Lansing, Mich.: Michigan Association of School Boards, 1972); Texas Association of School Boards, Handbook for Texas School Board Members (Bethesda, Md.: ERIC Document Reproduction Service, ED 101446, 1974); B. R. Anderson, Basic Boardmanship-What Every School Board Member Should Know About Basic Boardmanship, 3rd ed., (Trenton: New Jersey School Board Association, 1974); Washington State School Directors Association, Boardmanship for School Directors (Bethesda, Md.: ERIC Document Reproduction Service, ED 136377, 1975); Vivian Doering California School Boards Association, Boardmanship: A Guide for the School Board Member (Sacramento: California School Boards Association, 1975); Ralph C. Neill, What Every Oregon School Board Member Should Know About-Boardmanship (Salem, Oregon: Oregon School Boards Association, n.d.); Iowa Association of School Boards, The Iowa School Board Member - A Guide to Better Boardmanship (Des Moines, Ia.: The Iowa Association of School Boards, 1974); Illinois Association of School Boards, Guidelines For Effective School Board Membership - A Hand Book (Springfield, Il.: Illinois Association of School Boards, 1979).

various authors have studied the innumerable responsibilities. Olsen in the 1920's, studied board minutes and was able to isolate in excess of 2,000 separate functions and duties exercised by boards of education. These functions can be reduced to the general functions of managing, regulating and supervising the public schools which ultimately become the responsibilities of a board of education.<sup>5</sup> Douglas and Grieder have reduced the responsibilities of boards of education to three basic areas: planning, legislation and appraisal.<sup>6</sup> Knezevich maintained that general responsibilities of school boards were similar to the board of directors of private corporations. These similar responsibilities were establishing objectives, determining organizational structure, selecting major objectives, establishing major policies, and establishing the performance of the managerial staff.<sup>7</sup>

As far back as 1961, Knezevich and DeKock listed the responsibilities of school boards as:

1. To comply with the laws of the state and the regulations of the state educational authority.
2. To determine the goals or objectives of public education in the school district.
3. To choose the superintendent of schools and work harmoniously with him.
4. To contribute to the development and improvement of educational opportunities of all children and youth in the district.

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<sup>5</sup> Han Olsen, The Work of Boards of Education (New York: Teachers College, Columbia University, [1926]).

<sup>6</sup> H. R. Douglas and Calvin Grieder, American Public Education (New York: Ronald Press, 1948), p. 166.

<sup>7</sup> S. J. Knezevich, Administration of Public Education, 3rd ed. (New York: Harper and Row Publisher, 1975), p. 319.

5. To develop the policies which will attract and retain personnel needed to realize the educational objectives of the district.
6. To provide for an educationally efficient physical plant.
7. To help obtain the financial resources necessary to achieve the educational goals.
8. To keep the people intelligently informed about the schools.
9. To be sensitive to the educational hopes and aspirations of the people of the district.
10. To appraise the activities of the school district in light of the goals or objectives previously established.
11. To discharge its responsibility as a state agency by participating in statewide efforts to promote and improve public education.<sup>8</sup>

Grieder, Pierce and Jordan listed three primary functional responsibilities of boards of education and discussed seven other functions that boards are responsible for within the framework of state statutory provisions. The three primary functional responsibilities were planning for progress, policy making and legislation, and evaluation of programs and superintendent. Other board member functions mentioned were quasi-judicial, public relations, school finance, hiring personnel, determining conditions of employee service, curriculum, and physical plants.<sup>9</sup> More recently, Genck and Klingenberg outlined the main management responsibilities of a school board as establishing a liaison with the community, overseer of educational facilities and planning, setting purposes and objectives, establishing policies, reviewing performance, seeking out and

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<sup>8</sup>H. C. DeKock and S. J. Knezevich, A Guide to Better Boardmanship (DesMoines, Iowa Association of School Boards, 1961), p. 17.

<sup>9</sup>Calvin Grieder, K. Forbis Jordan and Truman M. Pierce, Public School Administration, 3rd ed. (New York: Ronald Press, 1969), pp. 126-130.

considering recommendations from management, and evaluating the district and superintendent.<sup>10</sup>

Various articles from the literature also presented and listed responsibilities of boards of education. St. John posed a list of what board members need to know in terms of a training program. The needs were related to the responsibilities of a board member. The topics to cover in orientation listed were board operations, legal and fiscal responsibilities, relations with news media, relations with community, educational terms, philosophy of the school district, curriculum and programs, proposed changes, criteria employed for evaluating programs and person group process and interaction, staff member relationships, and community relationships.<sup>11</sup>

John Francios cited eight major responsibilities of boards of education in terms of training new board members. The areas of responsibilities mentioned were policy making, knowledge of board policies, rules and regulations, conditions and needs of the district, legal responsibilities of school boards, personnel employment, rules of conducting a meeting, study of board minutes, and the school district's philosophy.<sup>12</sup>

Philip Jones described a curriculum for training new school board

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<sup>10</sup> Fredric H. Genck and Allen J. Klingenberg, The School Board's Responsibility-Effective Schools Through Effective Management, (Springfield, Illinois, Illinois Association of School Boards, 1978), p. 20.

<sup>11</sup> Walter D. St. John, "Why Boardmen Need Better Training and What They Need to Know," American School Board Journal 158 (February, 1971): 27-28.

<sup>12</sup> John Francios, "The New Boardmanship-Better-Lots Better Training Is Needed for New Boardmanship And How," American School Board Journal 158 (July, 1970): 9-10.

members and proposed five major areas of study for new board members and suggested forty-eight specific topics new members should have knowledge about in order to fulfill the responsibility of being a new school board member. The five major areas of study were school-community relationships and general responsibilities, school business and management, school curriculum and instruction, administration and teaching staff (personnel procedure and collective bargaining) and school district facilities.<sup>13</sup>

Ivan Bearden in an analysis of responsibilities faced by school boards in today's operation of schools provided a sample list of board business responsibilities for which board members must formulate policies and procedures at the local level. The sample list cited the following areas of responsibilities for boards of education, accountability, plant construction and renovation, public relations, purchasing, recruitment, financial matters, transportation services, curriculum, buildings and ground maintenance, food services, negotiations, and personnel management.<sup>14</sup>

The literature concerning board member responsibility was documented from 1926 until the present by various writers, state school board associations and by studies conducted by the National School Board Association. The responsibilities cited by the various authors and school board associations were both generalized and specific. The most commonly cited responsibilities found from the literature were: the development of policy, the establishing of broad program goals, the knowledge of school fi-

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<sup>13</sup> Philip G. Jones, "How To Train A New School Board Member And Ways to Help Seasoned Veterans Brush Up Too," American School Board Journal 160 (April, 1973): 27-28.

<sup>14</sup> Ivan R. Bearden, "School Board Members-College Freshman" The School Administrator, 37 No. 2 (February, 1980): 22.



nance, the knowledge of curriculum and instructional programs, personnel practices and evaluation of personnel, school board organization and operations, a working relationship with the superintendent of schools, the selection of a superintendent, board of education and program accountability, public relations with the community and staff, legal authority of a board of education, collective bargaining, interpersonal relationship with other board members, and facility planning.

Thus, the literature defined board member responsibilities. The most commonly cited responsibilities were selected as the responsibilities to be utilized in this study to determine if current orientation practices and methods were used to train board members toward these cited responsibilities.

#### ORIENTATION FOR NEW BOARD MEMBERS

Numerous articles, papers, reports, and studies were found concerning the orientation for new board members. The literature clearly presented orientation and inservice training was needed by new board members to have effective operating schools with board members understanding their function, duties, and responsibilities.

In the most recent study by the National School Boards Association on new school board members the time factor of when a novice board member felt capable, comfortable and a fully informed school board member was studied. Fifty-three percent of those surveyed stated it took more than a year to become a fully informed board member capable of making a decision. This National School Board Association report also showed one in four board members were newly elected, meaning that upwards of ten percent

of all board members were still in need of orientation.<sup>15</sup>

Several studies have been conducted regarding the various aspects of orientation of new school board members over the past twenty-five years. Harley Lautenschlager conducted a dissertation study in 1956 entitled, "A Study of School Board Inservice Training Techniques." Lautenschlager used structured interviews with forty-five school board members selected by the executive secretaries and regional school board associations in the states of Illinois, Michigan, and Indiana. The purpose of the study was to determine what board members believed to be the "techniques" which they had used for the board members to gain an understanding of the characteristics of a modern school operation and program.

Lautenschlager found that the superintendent was the "key person" in providing information to board members while national and state board associations were considered an important help to school board members. The respondents reported published reading materials were not an important source of information unless the material was referred by the superintendent as relevant to immediate concerns of the school system. In small school districts Lautenschlager reported personal contacts were considered an important way to keep in touch with the citizens. In large school districts board members relied more on formal reports for community input. In evaluating the work of the schools, board members indicated they relied heavily on reports from the superintendent and other staff members.<sup>16</sup>

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<sup>15</sup>Paul Blanchard, New School Board Members-A Portrait Research Report 1979-1, (Washington, D.C.: National School Board Association, [1979], p. 15).

<sup>16</sup>Harley M. Lautenschlager, "A Study of School Board In-Service Training Techniques", (doctoral dissertation, Indiana University, 1956).

Ronald Weitman submitted a doctoral dissertation to the University of Georgia in 1960 entitled, "An Analytical Study of the Increased Educational Needs of the Chairmen of Boards of Education in Georgia." His study analyzed the inservice needs of board chairmen through the use of a questionnaire completed by board chairmen and their superintendents. The questionnaire utilized was categorized into "broad areas of school board functions" with each area rated on a four point scale of need ranging from "no felt need" to "great felt need."

Weitman's study found that board chairmen in Georgia expressed "some felt need" for more knowledge in the nine areas considered. Board chairmen expressed "great felt need" in two areas, namely, Area IV, "The School Board and the Educational Program, and Area IX, "The Board and Board Issues." Further, Weitman found that the chairmen and their superintendents agreed as to the areas of need, but disagreed as to the extent of need. The superintendents expressed their needs to be less than that of the chairmen. The study found no significant relationship of the needs expressed and the variables of length of service, educational level of board chairmen, method of obtaining board membership or age except for those board chairmen over seventy years of age. The chairmen over seventy expressed significantly "less felt need" for help. Weitman also noted from comments made on the study questionnaire that the main source of information training for a board member was the superintendent, with only four school systems mentioned as having a systematic procedure for orienting new board members to their proper functions.<sup>17</sup>

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<sup>17</sup>Ronald E. Weitman, "An Analytical Study of In-Service Educational Needs of Chairmen of Boards of Education in Georgia," (doctoral dissertation, University of Georgia, 1960).

A study entitled, "Effective School Board Behavior As It Relates To School Board Inservice Activities in the State of Colorado" was written by Benjamin Kammer in 1968 at the University of Northern Colorado. Kammer compared the effectiveness of board members reported by their superintendents on a questionnaire. The results of the study clearly indicated a positive relation between participation in inservice training activities by board members and the effectiveness perceived by their superintendents for the board members. Board member effectiveness reported by superintendents was higher with the greater involvement of board members in the following listed activities: participation in regional, state and national meetings for school board members or administrators; assistance in the preparation of orientation activities for new board members; reading professional publications and materials; attendance at on-campus college conferences; involvement in the development and/or revision of board policy for the school district policy manual; and participation in inservice training activities.

Service and age factors were also considered in this study. Superintendents rated board members with four or more years of service. The study found approximately 25 percent of the board members as "neutral, ineffective and obtrusive." Board members between the age of forty to fifty were reported more effective than those older or younger. Effectiveness also correlated positively with the educational level of board members and district size.<sup>18</sup> ✓

Frederick Sales completed a doctoral dissertation in 1970 for Temple University entitled, "A Survey of the Orientation of New School

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<sup>18</sup>Benjamin Kammer, "Effective School Board Behavior as it Relates to School Board In-Service Activities in the State of Colorado" (doctoral dissertation, University of Northern Colorado, 1968).

Board Members Practiced by Selected Local School Districts." Sales utilized questionnaires to determine what practices were used to orient new board members, to assess the effectiveness of these practices, and to determine what length of time was required of a new board member to become oriented. The study involved forty-nine suburban school districts near Philadelphia and included responses from 187 board members and twenty-six superintendents. Sales concluded from a detailed analysis of his findings that superintendents and board members alike agreed upon the importance of orientation for new board members, but their performance in the area of orientation was not commensurate with their beliefs. Sales found new board members received less than half the specific information which they wanted. Most of the information received was in the area of business and financial operations with the least information received in the area of the educational program. Board members revealed from the study no one person should be responsible for orientation but the superintendents believed that it was primarily their responsibility to orient new board members. Sales also reported that few school systems had a locally prepared orientation handbook for new school board members.<sup>19</sup>

John Drayer conducted a doctoral dissertation in 1970 entitled, "A Descriptive Study of the In-Service Education Programs of the Wyoming School Boards Association." Drayer studied the in-service education programs sponsored by the Wyoming School Boards Association in order to improve the educational policy and practices as they related to the respon-

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<sup>19</sup>Fredrick C. Sales, "A Survey of the Orientation of New Board Member Practices by Selected Local School Districts," (doctoral dissertation, Temple University, 1970).

sibilities of Wyoming public school boards of education. Drayer used a historical study of the Wyoming School Boards Association and a questionnaire sent to a random sample of Wyoming school trustees who were members of the Wyoming School Boards Association and to a random sample of trustees who were not members of the same association. The findings of the study showed that the school trustees surveyed were satisfied to a high degree with the total inservice program sponsored by the Wyoming School Boards Association which included the various state board publications, state convention and area workshop meetings. The library services offered by this association were not utilized well by the Wyoming School trustees.<sup>20</sup> Drayer from his findings, recommended a proposed inservice education program for Wyoming school trustees that included the following: "(a) publishing of Wyoming School Boards Bulletin; (2) Publishing of the Information Service Newsletter; (3) Conducting Special Workshops; (4) Conducting Area Workshop; (5) Conducting Annual Conventions; (6) Operating a library in order to provide additional services to the trustees."<sup>21</sup>

Miles Coverdale submitted a doctoral dissertation entitled, "The Identification of the School Board Training Needs of Eskimo and Indian Lay Advisory School Board Members of Rural Alaska" in 1972. Coverdale studied the training needs of native lay advisory school board members in Alaska and used two separate interviews with thirty-eight advisory board members in seven areas of board responsibility. The specific areas used to identify training needs were: school law, board membership, board

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<sup>20</sup> John M. Drayer, "A Descriptive Study of the In-Service Education Programs of the Wyoming School Boards Association," (doctoral dissertation, University of Wyoming, 1970).

<sup>21</sup> Ibid., p. 163.

organization and operation, school personnel, community, other agencies, educational program, finance and physical facilities. Coverdale concluded from his study that one, school board members were not educated by the school administration as to what a board member's duties or responsibilities were; two, advisory school boards desired to become boards of authority and to receive training in school boardmanship; three, board members felt they had not been informed of the functions of related organizations and agencies; and, four, most advisory school board members learned about schools and school boards through interaction with other board members by experience. Also, school administrators did not properly orient board members with information contained in the State of Alaska's "Manual for Advisory School Board Members."<sup>22</sup>

Milton Snyder conducted a doctoral study, "The New School Board Member," which he submitted to the United States International University in 1972. The study concerned the perception of experienced school board members, superintendents, and new board members regarding several aspects of new board member orientation. The sample of the study was drawn from four southern California counties. Structured interviews were administered to thirty board presidents, thirty superintendents and thirty new board members. Snyder found new board members believed themselves to be more knowledgeable than their superintendents and board presidents did. Also, new board members felt more comfortable as board members more quickly than the time perceived for them by board presidents and superintendents.

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<sup>22</sup>Miles L. Coverdale, "The Identification of School Board Training Needs of Eskimo and Indian Lay Advisory School Board Members of Rural Alaska," (doctoral dissertation, Utah State University, 1972).

All three respondent groups felt orientation programs for new board members should be required either prior to being seated or within three months after being seated. New board members were perceived to be the strongest in their roles as community representatives but to be the weaker in the area of legal responsibilities. The study further showed that superintendents viewed themselves as important in the orientation process but board members disagreed with this importance. All respondent groups thought that orientation training should be given by "technical experts" and be confined to a limited geographical area such as county or region. All three groups felt that ongoing training for all board members was needed. All the respondent groups held the following to be important areas for new board member training: good relations with superintendent and educational goal formulation, community relations, understanding the schools' budget. The following areas were considered to be of little importance by the respondent groups: building maintenance, career education, community politics, relations with other districts, and collective bargaining.<sup>23</sup>

Lanning G. Nicoloff submitted a doctoral dissertation in 1977 to Northern Illinois University entitled, "Perceived In-Service Education Needs of Members of Board of Education in Illinois." Nicoloff studied the perceived needs of inservice education for four respondent groups, all board members, board presidents, experienced board members and new board members from a sample of eighty schools from the entire State of

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<sup>23</sup>Milton L. Snyder, "The New School Board Member," (doctoral dissertation, United States International University, 1973).



Illinois separated into six regions by elementary, secondary, and unit districts. Through the use of separate questionnaires for each respondent group, Nicoloff's study concluded that all the respondent groups felt a need for further inservice education. The study also concluded perceived inservice needs of all board members in order of importance were increasing power and influence of local boards of education, improving the financial operation and conditions of schools, providing quality education, and building better boards of education. Also, board members felt the least need for inservice education in the areas of specific special programs and services of a school system and improving the mechanics of board meetings. New board members in the study were found to have a strong need to gain an understanding of school district budgets, and knowledge in the areas of communication and relations with the community. Size categories within the three types of districts varied considerably with regard to board member need.<sup>24</sup>

Valerie LeBaron Sullivan submitted a dissertation to Northern Arizona University in 1978 entitled, the "Perceived Needs for Orientation of School Board Members in the State of Arizona." The study analyzed six demographic variables compared to the perceived needs for orientation of school board members utilizing a t-test statistical procedure to allow the results to be generalized. Fifty variable areas were grouped into six areas of board orientation need. The areas were as follows: personnel and staffing, curriculum, community/public relations, management skill and

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<sup>24</sup>Lanning G. Nicoloff, "Perceived In-Service Education Needs of Members of Boards of Education in Illinois," (doctoral dissertation, Northern Illinois University, 1977).

board operations, school law, and school finance. Sullivan concluded, "practicing board members feel a need for additional training in a variety of areas, new board members do not differ from women in the perceived needs in the six areas of orientation, anglo board members have lower perceived needs than board members from other races in the area of school law but not in the other five areas of orientation, size of the school district and length of service on a school board was not a significant factor in the perceived needs in any of the six categories studied."<sup>25</sup>

Sullivan recommended an orientation workshop for new board members, legislative workshops and workshops in the areas of program evaluation, public support of schools and policy development be studied by the Arizona School Boards Association. Further recommendations were to develop model orientation programs at a state level in addition to local orientation programs.<sup>26</sup>

The literature clearly presented orientation and inservice training was needed by new board members for the various responsibilities new members experience to have effective operating boards of education and thus, per se, effective operating schools. The need of orientation for new board members cited in the literature was based on board member turnover and the numerous responsibilities board members must deal with effectively. Further, the literature described the superintendent of schools and state school board associations as most important in providing in-ser-

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<sup>25</sup>Valerie L. Sullivan, "Perceived Needs for Orientation of School Board Members in the State of Arizona," (doctoral dissertation, Northern Arizona University, 1977).

<sup>26</sup>Ibid., p. 98-99.

vice training activities for new board members while the board president and other board members were cited as secondary sources in providing information and training for new board members.

Also, the various studies from the literature cited indicated that few local school districts had systematic, prepared programs based on the needs of board members while the state associations cited needed to develop model orientation programs.

#### METHODS TO ORIENT NEW BOARD MEMBERS

The literature discussed actual methods and practices utilized to orient new board members and was found basically in articles from American School Board Journals and other educational related publications. In general, these articles propose the following planning practices be used to have effective orientation programs:

1. Determining what subject areas are to be covered
2. Choosing a physical facility and location for orientation programs
3. Scheduling orientation sessions
4. Choosing personnel involved and materials for new board members' orientation.

The National School Boards Association's Educational Policy Service recommended boards of education should have a policy on new board member orientation, as evidenced from sample policies the Educational Policy Service provided boards of education in 1975. The sample policies stressed both board candidate orientation and specific phases of an orientation program. A sample policy provided by the East Detroit Michigan Public School District in East Detroit, Michigan, used by the Education Policy Service detailed four specific phases to be included in an orien-

tation program.

- "1. In the interim between appointment and actual assumption of office the new member will be invited to attend all meetings and functions of the board, including study sessions, and will receive all reports and communications normally sent to board members.
2. In the interim between appointments and actual assumption of office the new member will be furnished with selected materials dealing with information about the district, state education laws and regulations, and local policies and regulations. Such material shall include board policy manual, policy development materials, district annual report, Michigan general school laws, board meeting minutes for the previous year, financial reports.
3. An orientation meeting will be convened for the primary purpose of orienting the new member to his or her responsibilities, to the board's method of operating, and to school district policies and problems.
4. A schedule of appointments with selected administrative personnel shall be arranged by the superintendent to afford an opportunity for the new member to discuss specific functions and concerns at different levels of operation."<sup>27</sup>

The Washington State School Directors Association manual defined a suggested orientation program for orienting new school board members composed of first formulating a policy "to acquaint new members with the duties of office."<sup>28</sup> This state association suggests the following steps and information be given new board members:

1. a welcome be sent asking new members to attend meetings until they are officially members;
2. the board president should outline the methods used by the board and problems of the board;
3. new members should visit the schools with the superintendent who

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<sup>27</sup> East Detroit Public School Board of Education, "New Board Member Orientation Policy," (East Detroit, Mich.: East Detroit Public Schools Board of Education Policy (1975), BHA.

<sup>28</sup> Washington State School Association, Boardmanship (For School Districts), (Olympia, Wash.: Washington State School Association, 1975), p. 19.

should explain the peculiar features, program purposes and problems of the schools;

4. new members should have individual conferences with the superintendent and other administrators to learn about work, objectives and purposes of the schools;
5. superintendent should furnish new members with written information containing written policies, rules and regulations, last local school report, copy of meeting minutes for past year, map of school district, tables showing tax rate for recent years, bond indebtedness, budget, philosophy of school system, curriculum and extra curricular activities;
6. copies of student handbooks and teacher handbook; and
7. a packet of information from the Washington State School Director Association.<sup>29</sup>

The literature discussed new board member orientation programs at the state school board association level. The state programs described have a commonality of content areas offered to new board members. The content areas described were state statutes (laws), community relations, curriculum, development of school policies, program and personnel evaluation, school finance, school facilities, school board meetings, and relationship between the school board member and state association.

Philip Jones in 1973 described formal orientation programs and suggested the New Jersey School Boards Association new member training conference as a good model. The formal orientation program suggested was as follows:

1. hold the training conference at a local university or the newest innovative public school in the area;
2. the state and national school board association should conduct programs of formalized training in addition to local new board member training efforts;

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<sup>29</sup>Ibid., p. 19

3. both educational professional speakers and veteran board members should be used to present carefully selected topics;
4. orientation should begin before taking a seat on the board or as soon as possible after election day;
5. a long weekend meeting starting on Friday evening and ending on a Sunday with lunch;
6. the major goal of training is to develop needed questioning skills a new board member will need to handle the policy problems they will face later.<sup>30</sup>

Jones described the "ideal" orientation program utilizing the program developed by the New Jersey School Boards Association. The aspects and components described were printed material for use at the conference and for reading after the conference, distributed to the participants upon arrival; a pre-session attitude survey and post attitude survey to analyze the success or failure in making attitudinal change and to determine what misconceptions new board members have about boardmanship; dinner with libation; mock board meetings with participants representing a cross section of the group that have pre-trained group leaders; the orientation topics found on the areas of the board member as a state official, the board, budget and school finance, curriculum, staff, communication role of the board member, the board's responsibility to set goals and evaluate the school program.

Techniques used to present the topic include audio visual materials, simulation devices, gaming devices, case studies. Case studies were used extensively and included the National School Boards Association

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<sup>30</sup> Philip G. Jones, "How to Train a New School Board Member and Ways to Help Seasoned Veterans Brush Up Too," American School Board Journal 160 (April, 1973): pp. 25-27.

film, "On Board." This film as described, presents real life problems that a board member would likely encounter at a simulated board meeting.

Jones further suggested the new members before attending the New Jersey School Board workshop for new board members, attend a real board meeting, ask the board president and superintendent for a list of the most crucial issues, read the board policy manual, school regulations and other printed material on the operation of the schools.<sup>31</sup>

The Illinois Association of School Boards has utilized a program similar to the New Jersey School Boards Association which this author has been acquainted with. In Illinois the state school board association sponsored a new board member orientation clinic one to one-and-one-half months after annual board member elections. The clinics have been held in the northern and southern parts of the state, usually at a Holiday Inn for one-and-one-half days beginning on Friday evening. The clinic program described in an Illinois Association School Board brochure consisted of discussions, short presentations and work sessions arranged around a Friday dinner, and Saturday breakfast and lunch. The content areas covered at the orientation clinic consisted of the board member's role, board and superintendent relationship, problem solving simulation, utilizing "On Board" from National Association of School Boards, legislation, school finance, law, policy development and collective bargaining.<sup>32</sup> A packet of reading materials correlated to the above mentioned content areas was

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<sup>31</sup> Ibid., pp. 25-27.

<sup>32</sup> Illinois Association of School Boards, "Board Member Orientation Clinic," Springfield, Il. 1980, (printed program).

given to the participants to amplify their knowledge in these areas. The packet materials contained other regular and special publications of the Illinois School Board Association.

Both the New Jersey and the Illinois state school board orientation programs utilized what Walter St. John suggested in the literature:

"Total packages that offer held where its invariably needed should be prepared by the state school board association." Examples of these special package materials were information on collective bargaining conducting a school board meeting, grievance procedures and relations with news media."<sup>33</sup>

Another state orientation and inservice training program described in the literature was the New York State School Boards Association program. The New York program is a statewide program with twelve separate training institutes based on geographical area, co-sponsored by the New York State School Board Association and supported by approximately two-thirds of the state's school boards. Each institute has an advisory board composed of five to nine members who plan four to six major programs a year. Some of the institute groups provided special workshops for new board members. The institutes for training were held at schools throughout the geographical area providing an advantage of not having to rent facilities. In 1969 one of the state's institutes, the Genessee Valley section sponsored a new board member one-day workshop. In 1970 the same institute changed the format of the workshop to a two-day session in different locals with an expanded program format. The new member workshop "mini-courses" were two hours in length with a varied presentation format that utilized speakers

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<sup>33</sup>Walter St. John, "Why Boardmen Need Better Training and What They Need to Know," American School Board Journal 158 (February, 1971): pp. 27-28.



working with seminar groups, discussions, and audio-visual materials. The topics listed by Piper for these training sessions were law, education finance, negotiations, effective board members and board meetings, evaluation of personnel.<sup>34</sup>

Piper noted that experience indicated, "one of the most effective formats is semi-structured small group discussions with five to seven members from different boards meeting together. If group assignments are carefully rotated over a period of time, participants can be exposed to knowledge and techniques from a wide range of districts."<sup>35</sup>

Noted from the previously described state association orientation programs was a commonality of program content, intensive one or two day work sessions, speakers from state school board associations or content area experts, use of multi-media for presentations with few lectures, and problem solving simulation of real life problems new board members will face.

The literature discussed few local district orientation programs in any detail as to planning, logistics, speakers, or time. Philip Jones outlined a suggested curriculum of forty-eight topics for grooming new board members at the local school district level with a study list of five major content areas. The content areas listed were school-community relationship, school business and management, school curriculum and instruction, administration and teaching staff, and school district facilities.<sup>36</sup>

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<sup>34</sup>Donald S. Piper, "Help for Beleaguered Board Members," School Management (May, 1972): pp. 20-21.

<sup>35</sup>Ibid., p. 21.

<sup>36</sup>Jones, "How to Train A New School Board Member," pp. 27-28.

A formal training program at the local level was described from Keansburg, New Jersey school district in the American School Board Journal in 1974. The school district of three schools and 2,400 students had a one day intense training program for new school board members and experienced board members. The location of the session was in the school library with the presentors being veteran board members, key administrators from the district, and high level administrators from the state department of education or state school board association. The physical arrangement described was a theatre in-the-round for the board members, and four corners with podiums for speakers. The day was divided into ten sessions with the introductory session delineating how the school operated, presented by the principals.

The second session considered curriculum presented by faculty members, followed by an explanation of the position of the superintendent and board president. The afternoon session preceded by lunch, consisted of discussions on board related topics of: "role of the board secretary, agenda topics, board policies, board responsibilities, board's public relations program, role of school attorney, litigation, audits, budgets, the board member as a state official, the role of state and national board associations, and more."<sup>37</sup> Discussions were preferred rather than reading materials so "the voice can judge the value of what is said by the sincerity of the individual presentations."<sup>38</sup> New board members after the one

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<sup>37</sup> American School Board Journal, "After You Shake Their Hands, Try This New Way To Train New Board Members Quickly And Profitably," American School Board Journal 161, (May, 1974): p. 30.

<sup>38</sup> Ibid., p. 35.

day session, were given a notebook of information collected and written by the superintendent. Part of the notebook contained case studies of problems that likely would be encountered by the new board members. Besides this one day session the board had workshops every Thursday throughout the year besides the regular meeting.<sup>39</sup>

A survey by the Pennsylvania School Public Relations Association on local training for school board members was conducted and discussed by Nick Goble, the public relations director of this association. The survey revealed ideas from existing local school district orientation programs that have been successful in the State of Pennsylvania. The ideas listed were:

- "1. Encourage all candidates to attend board meetings before the election.
2. Provide informal rap sessions between new and veteran board members.
3. Invite new board members to a series of hour-long, daytime briefings with key administrators on school business affairs, personnel, instruction, buildings and grounds, and auxiliary services.
4. Before their first board meeting, review with incoming board members parliamentary procedure and other areas relating to the actual conduct of the school board meeting.
5. Allow new board members to attend board committee meetings (if such committees are used for background)
6. Record district philosophy, description of programs, and public relations tips on cassette tape.
7. Provide a special workshop on school-community relations.
8. Prepare a series of slide-tape, audio visual presentations on specific school topics.
9. See that all board members receive regular district publications, faculty handbooks, administrative directives, and the like. Plan a session for the board to discuss each publication.

10. If the school district maintains a newspaper clipping file, make copies for board members who will find them valuable background when working with news media.
11. Invite board members to attend occasional teacher, administrative, and other staff inservice training programs.
12. Conduct occasional, informal sessions between board members and administrators during both "good" and "bad" times.
13. Run two major one-and-a-half-day training seminars each year. The fall seminar deals with the district's educational program while the spring meeting focuses on budget development.
14. Candidates for the school board in one district are invited to visit the schools as part of a "Community Education Day."
15. Another district has established a committee to plan school board training programs, review the district's total inservice budget, and select state and national conferences and workshops for board members to attend.
16. Keep in mind the personal schedules of board members when planning inservice training.
17. Help prepare board members to speak to high school government classes and community groups about school board governance, board policies, and local control of public education.
18. Occasionally develop board workshops with games or brainstorming sessions in goal setting, long range plans, disposition of buildings, etc."<sup>40</sup>

The literature discussed and documented the methods and practices to orient new school board members on a state or regional level by the state school board associations. The factors considered and discussed in the state association orientation programs were content, facilities, scheduling, personnel involved, and materials utilized. The literature contained a paucity of information pertaining to local school district orientation programs except for successful orientation program ideas gleaned from the

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<sup>40</sup>Nick Goble, "Some Good Ideas for Local School Board Training," Illinois School Board Journal Vol. 48, (July-Aug., 1980): p. 16-17.

Pennsylvania survey previously cited and a few local orientation programs described in journal articles.

In conclusion, the literature discussed articles, books, reports, programs and studies dealing with the responsibilities of boardmanship and orientation for new board members toward these responsibilities. The literature revealed the responsibilities board members dealt with had common elements in the content areas cited. The need for orientation of new board members was determined to be greater today because of the changing educational milieu in the public sector. The literature clearly supports the need for carefully planned orientation for new members and for continued inservice education of all board members with actual practices and methods described at a state association level. Local school district orientation practices and methods for new school board members were not well defined in the literature as to resources, facilities, personnel and scheduling, but content areas for orientation programs were mentioned.

This review was important to determine the items for inclusion on the survey instruments and to structure the analysis of orientation practices addressed in the study. The review of literature also clearly addressed the fact that the key to improved operation of a school board was the improvement in the capabilities of the new board members to deal effectively with their responsibilities, which this study addressed as to board member responsibilities, current trends, and practices and procedures for the orientation of new board members.

## CHAPTER III

### METHODS AND PROCEDURES

The overall purposes of this dissertation were to identify from the literature the most accepted responsibilities of boards of education and determine what consistent methods were used to orient new board members for their responsibilities; to identify and analyze actual practices to orient new board members toward the most accepted responsibilities of boards of education within the framework of nine commonly accepted administrative functions; and to analyze the relationship between actual orientation practices and what the literature suggested about orientation practices.

Specifically, this study posed four major questions. Those were:

1. For what responsibilities should new board members be trained?
2. What opportunities and resources were available for new board members during the first crucial months or years for orientation?
3. Who was responsible for the present orientation of new board members?
4. How can existing orientation programs be improved to relate to the responsibilities new board members undertake?

The methods and procedures utilized in the development of this dissertation were chosen because they appeared to be the most appropriate techniques available for the successful completion in answering the question posed by this study. The selected methods and procedures would fall into the category of research that can be described as descriptive re-

search.<sup>1</sup> This dissertation has focused on describing existing conditions, current practices, trends, and relationships as they related to responsibilities of boards of education and orientation of new school board members.

### Review of Literature

To accommodate the scope of the purposes of this dissertation an extensive review of the literature was conducted. This review was conducted in three different stages: (1) a review of the literature pertaining to the responsibilities of boards of education; (2) a review of the literature pertaining to studies conducted on the orientation of board members; and (3) a review of the literature pertaining to the actual practices used to orient new board members.

A review of the literature pertaining to the responsibilities of boards of education began with recent studies of the National School Board Association, eight state school board association handbooks, and various authors in the field of educational administration. This review was necessary to determine the most accepted responsibilities of boards of education as seen by the authorities. As a number of writers had addressed this topic over a period of years, it was possible to gather the necessary insights and determine the most accepted responsibilities for boards of education.

Also, another purpose of this study was to determine what consistent methods were used to orient new board members toward these respon-

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<sup>1</sup> Stephen Isaac and William B. Michael, Handbook of Research and Evaluation (San Diego: Robert R. Knapp, 1971), p. 24.

sibilities. To determine the consistent methodology it was necessary to select the most commonly accepted responsibilities presented by the literature to be used for the purposes of comparison to what new board members identified as the most accepted responsibilities of boards of education. It was decided that fifteen responsibilities were the most commonly cited by the authorities and utilized for comparative purposes. A review of literature pertaining to the orientation of new school board members was also conducted. This review was undertaken to determine the past practices and current trends on the orientation of new board members. A review of Dissertation Abstracts revealed nine research studies pertaining to the orientation or inservice training needs of new board members toward responsibilities a new board member would encounter. Most of these studies were based on perceptions of new school board members toward orientation needs and the practices used to orient new board members. The studies cited in the previous chapter described identification of needs and perceived needs of new board members for training or orientation and practices used to orient new board members. The studies dealt with both new board members and chairmen of boards of education both at a local and a state level.

A review of literature pertaining to the actual methods and practices to orient new school board members was limited to journal articles and state association literature concerning orientation. The literature described and documented orientation practices for new school board members on a state level but contained a paucity of information describing and documenting local school district orientation program methods and practices, although the literature mentioned a current list of successful ideas that could be utilized as orientation practices at the local level.



Various sources were utilized for gathering the materials to review the literature. Those sources were primarily: Loyola University Library, the public relations director of the Illinois School Boards Association, Illinois State Board of Education Research Service, and personal materials of the author.

### Selection of the Population

The population selected for purposes of gathering data pertaining to board member responsibilities and orientation practices and methods included forty-four superintendents, and board members from forty-four boards of education who had served less than two years on a board from public school districts in DuPage County, Illinois. The only board of education not utilized as part of the study population was that of Palisades Community Consolidated School District 180 in which the author is presently serving as superintendent.

DuPage County, Illinois, geographically, is situated in the northeastern portion of the State of Illinois. The county is bounded by Cook and Kane Counties on the north, Kane and Will Counties on the west, Will and Cook Counties on the south, and Cook County on the east. The county has many diverse characteristics. It includes urban communities, suburban communities, and rural communities. The wealth in the county is equally diverse and ranges from poverty to very wealthy.

The public school districts in DuPage County total forty-five. Included in this number are: six unit districts, seven high school districts, and thirty-two elementary school districts. The DuPage County public school districts have as many diverse characteristics as the com-

munities they serve. The school enrollments reported by the DuPage County Educational Service Region for 1980-81 ranged in size from the smallest elementary district with 27 students, to the largest unit district enrolling 12,438 students. The wealth of the school districts was equally diverse. Based on 1978 equalized valuation and student average daily attendance, the wealth of the school districts range from \$600,670.91 of assessed value per average daily attendance as reported by the DuPage County Education Service Region, to \$22,463.28. Overall, the forty-five boards of education in DuPage County serve a total student population (1980-81) of 118,441 students in 232 buildings, and employ 7,437 staff members according to data gathered by the DuPage County Educational Service Region. Appendix A delineates the public school districts in DuPage County, Illinois.

With the orientation of new board members being a matter important to both the superintendent of schools and new board members as cited in the literature, it was determined that the superintendent of schools and board members with less than two years of experience should participate in this study. The two year limitation for new board members was chosen to give the study a sufficient number of respondents, since starting in 1981, Illinois public school board members will be elected every two years to serve a four year term unless the terms are extended to six years by a general referendum election by the voters in a school district. In addition, the literature cited a variance of time for new board members to become oriented toward the responsibilities encountered from three months to two years.

While it was known that the characteristics of the communities

and school districts of DuPage County, Illinois were diverse, this study did not attempt to generalize its interpretation beyond the scope of the population surveyed. Interpretations and conclusions were limited to analysis of the information obtained from the new board members and superintendents in DuPage County, Illinois who participated in the study.

### The Survey Instrument

A four part survey was developed as the initial data gathering source. Prior to the actual dissemination of the survey, an effort was made to validate the instrument by a jury of experts and by field testing it with new board members from the school district the author serves in as superintendent.

The first field test after the survey had been developed was with a jury of experts in the field of school administration. The experts were contacted to solicit their assistance in evaluating the survey. All members of the jury held doctorate degrees and are either presently serving as a superintendent of schools or hold the position of professor of educational administration and supervision. Appendix B lists the jury of experts.

A purpose in field testing the instrument was to ascertain, if the content and construction of the survey were understandable and appropriate to avoid ambiguities on the part of the respondents. Thus, the first field testing of the survey provided an opportunity to reveal defects in the survey prior to the second field test and to the development of the final form.

The jury of experts selected were asked to provide comments on

the survey itself. Appendix C was written to the experts who served as jury members and described the essential task they were asked to complete.

Responses from the jury members suggested that overall, with some minor editing, the content and construction of the survey were sufficiently clear and designed to solicit the information being sought. The jury members noted some concern in three areas. On Part I of the survey two jury members suggested that the identification of the respondents be coded or the name identification be optional to increase the number of responses. This change was made on the final survey with the name identification being optional.

Parts II and III of the survey, pertaining to the responsibilities of boardmanship and the importance of some responsibilities, elicited two basic comments from four members of the jury. The first comment was to clearly identify the columns and numeration of responsibilities listed for ranking and methods used. The second comment was to clarify the boardmanship responsibility for number 5 pertaining to the evaluation of personnel.

Further, two jury experts suggested changing the responsibility listed from evaluation of personnel to evaluation of the superintendent, and then revise the responsibility listed for number 8 from personnel practices to knowledge of personnel practices including staff selection and evaluation. Lastly, two members of the jury suggested number 13 relating to the responsibility of facility planning, be changed to read facility planning related to enrollment and programs. These suggestions were incorporated into both Parts II and III of the final survey to clarify the boardmanship responsibilities listed as obtained from the literature.

Finally, four members of the jury suggested a minor format change and clarification of directions on Part IV of the survey concerned with orientation resources. The suggestions from the experts were incorporated into Part IV of the survey to clarify the directions and remove the ambiguities of which columns should be marked.

The survey was revised and incorporated the suggested comments and concerns from the jury of experts. The revised survey was field tested by six board of education members of Palisades Community Consolidated School District 180 in DuPage County, Illinois. The second field test was used to ascertain the appropriateness of content and format with new board of education members from the same county as the planned respondent group. The new board members on the second field test were asked to complete the survey and make suggestions and comments as to the readability, directions, format, and ease of answering the survey. The second field test of the survey provided an opportunity for new board members to reveal defects in the survey and possibly eliminate further ambiguities. Appendix D is the letter written to six members of the Palisades Community Consolidated School District 180's board of education requesting this second field test.

Responses from the second field test by the above mentioned board of education suggested that overall the content and format of the survey was clear and understandable, although only one of the six respondents correctly responded to Part E of Section 1, that being the wealth factor of equalized assessed valuation.

Final Form of the Survey

Based upon the input that was provided as a result of field testing the survey with a jury of experts and six members of a board of education, the survey was edited, some modifications made, and typed in its final form.

One survey was developed to be completed by the superintendent and new board members from the sample population, (Appendix E). The survey was distributed by mail directly to the superintendents and to new board members through their superintendent. An explanatory letter was sent to the superintendent with instructions to distribute the survey to new board members, (Appendix F). In addition, an explanatory letter was included for the new board members, (Appendix G).

The first section of the survey pertained to identification data, school district demographics and personal demographics of the respondents. This section asked the respondents to identify the type of school district; i.e. elementary, high school, or unit; the enrollment of the district; the wealth of the district in terms of 1979 equalized assessed valuation; position; length of service; sex; occupation; organizations the board of education is affiliated with; and whether the district had an orientation program for new school board members. This information was sought in an effort to determine if any of these factors might reveal any trends, commonalities, or differences related to the orientation of new board members and to determine what districts would be randomly sampled to participate in the interview portion of this study.

Next, two sections of the survey requested information pertaining to the responsibilities of boardmanship as to ranking the board-

manship responsibilities, identifying orientation methods actually used for the responsibilities listed, and determining the importance of orientation for the boardmanship responsibilities.

The second section of the survey dealt with boardmanship responsibilities and requested the respondents to rank order the fifteen listed boardmanship responsibilities from one, most important, to fifteen, least important. This information was sought to identify the rank order importance or priority of the listed responsibilities from new board members and superintendents as previously cited in the literature. Further, the respondents were requested to identify the actual methods used for orientation toward these responsibilities. This information was sought to identify current practices and trends in existence and to compare these identified practices and trends to what the literature cited as methods used to orient board members.

The third section of the survey requested the respondents to rate the importance of orientation for the listed boardmanship responsibilities on a four point, Lickert Method scale. The boardmanship responsibilities listed in section III were the same as listed in section II of the survey, and were cited in the literature most frequently as boardmanship responsibilities. The respondents were requested to rate each responsibility on a four point scale, from extreme importance to no importance. This information was sought to compare the importance rating by respondents to (1) the ranking of the same boardmanship responsibilities; (2) actual orientation sessions attended; and (3) orientation methods utilized to determine if the respondents' ratings of importance were the same or different from actual orientation practices experienced or provided, and to identify

trends or commonalities in terms of the importance of orientation toward the listed boardmanship responsibilities.

The fourth and final section of the survey requested the respondents to identify the resources most helpful during orientation toward the responsibilities of boardmanship, then identify the sources actually used for orientation. This information was sought to determine from the respondents what were the most helpful resources in orientation; i.e., the local, state, or national level, and what resources were actually used during orientation to determine if trends or commonalities exist.

Once completed, the survey was mailed to the forty-four superintendents in DuPage County, Illinois, and they were requested to complete the survey and distribute the survey to new board members for completion. All surveys were requested to be returned via a self-addressed, stamped envelope, within approximately two weeks. Accompanying the survey materials was a letter of introduction and explanation for the superintendent (Appendix F) and the same for board members (Appendix G) from the author.

### The Interview

After the surveys were returned it was determined from the respondents, who indicated the existence of an orientation program for new board members, three superintendents and new board members from the same district from each type of district, elementary, high school, and unit, would be chosen for further investigation via an interview. The nine districts chosen were selected by using a stratified random selection to assure that representation would be available from the three types of districts. The number of board members interviewed varied from the districts chosen be-



cause of the time limitation placed on the definition of a new board member. In all, nine new board members and nine superintendents were interviewed from the nine school districts randomly chosen on the stratified sample.

The interview technique was selected as a method to further validate the survey, as a means to obtain greater insight, and to explore significant areas not identified in the original survey. An interview guide was prepared with nine basic questions to further identify the needs and purposes for orientation, orientation resources, opportunities, responsibility for planning and organizing orientation sessions, orientation topic determination, local board policies on orientation, the amount of money and time spent on orientation, and suggested improvements in existing orientation programs (Appendix H).

### Analysis of Data

Information received from the survey and from the interviews was tabulated and analyzed, with specific concerns given to implications for superintendents, local boards of education, state school board associations, and the National School Boards Association. A narrative analysis described trends, commonalities, patterns, differences, uniquenesses, and possible explanations for the data.

#### A Comparison to What the Literature and Respondents Revealed Pertaining to Boardmanship Responsibilities

A narrative analysis was completed which focused on a comparison of what the literature had revealed pertaining to boardmanship responsibilities and orientation of board members to the data received from the

survey and personal interviews pertaining to the importance of boardmanship responsibilities and methods of orientation toward these responsibilities, the extent of orientation and the resources utilized for orientation as identified in DuPage County, Illinois, school districts. This analysis described various trends, common elements, uniquenesses, differences, and contrasts. This information was treated with limited statistical procedures; primarily utilized were measures of central tendency including the mean, median, and mode. In addition where appropriate, tables were utilized to present an overview of the data.

An Analysis of Board Member Orientation Expectancies  
and Actual Orientation Practices

A narrative analysis was completed which focused on the comparison of new board member orientation expectancies as measured by importance of orientation toward listed boardmanship responsibilities and actual orientation practices and methods. This comparison describes trends, common elements, uniquenesses, pitfalls, and differences between what actually exists and the needs of new board members as identified in DuPage County, Illinois, school districts. This information was tabulated and again treated with limited statistical procedures. Primarily utilized were measure of central tendency including the mean, median, and mode. In addition, tables were utilized to present an overview of the data.

Analysis of Orientation Practices and Methods for New School  
Board Members in Relation to Administrative Functions

An analysis of the DuPage County school districts' orientation Practices and methods for new school board members was completed to

determine if a relationship existed between those practices and methods and nine commonly accepted administrative functions. The nine administrative functions chosen from sixteen developed by Stephen J. Knezevich were utilized as the functions for comparative purposes. The functions that were used were anticipating (planning), programming, organizing, staffing, resourcing, executing, coordinating, communicating, and controlling.

An analysis of the data received from the surveys and interviews was completed with the various aspects of existing orientation programs identified and categorized in terms of the nine administrative functions devised by Knezevich. Based on the nine categorized functions, the information was tallied using raw numbers in an effort to determine the degree to which the nine functions could be identified. This analysis was recorded in terms of how many orientation programs for new board members from the sample were based upon each of the nine Knezevich functions utilized for this study. A narrative analysis described this comparison and tables were utilized to summarize this information for implications based on trends, common elements, patterns, uniquenesses, and differences. Finally, a summary was presented concerning the various methods, practices and procedures that were revealed from the data received from the respondents to identify areas that could be beneficial to superintendents, school boards, state school board associations, and the National School Board Association.

## CHAPTER IV

### PRESENTATION OF DATA

The overall purposes of this dissertation were to identify from the literature the most accepted responsibilities of boards of education and determine what consistent methods were used to orient new board members for these responsibilities; to identify and analyze actual practices to orient new board members toward the most accepted responsibilities of boards of education within the framework of nine commonly accepted administrative functions; and to analyze the relationship between actual orientation practices and what the literature suggested about orientation practices.

Specifically, four questions were posed in this study. They are

1. For what responsibilities should new board members be trained?
2. What opportunities and resources were available for new board members during the first crucial months or years for orientation?
3. Who was responsible for the present orientation of new board members?
4. How can existing orientation programs be improved to relate to the responsibilities new board members undertake?

Chapter IV presents the data recorded on all of the surveys and from the interviews. In an effort to present the data in a manageable format, this chapter is subdivided as follows:

1. General Characteristics of Respondents and the School Districts

This sub-section presents a compilation of the data obtained from all the respondents by school district.

2. An Overview of Responses Received from Superintendents and New Board of Education Members on Boardmanship Responsibilities

This sub-section presents a compilation of data obtained from all respondents concerning boardmanship responsibilities and importance of orientation toward these responsibilities.

3. An Overview of Responses Received from Superintendents and New Board Members on Methods and Resources Utilized for Orientation

This sub-section presents a compilation of data obtained from all respondents concerning the methods, practices and resources utilized for the orientation of new school board members.

4. An Overview of Orientation Programs Utilized by DuPage County, Illinois, School Districts to Orient New School Board Members

This sub-section presents a compilation of data obtained from the randomly selected respondents interviewed pertaining to existing orientation programs utilized to orient new school board members.

A survey was conducted among forty-four public school districts in DuPage County, Illinois, with the respondents being superintendents and new school board members. The survey instrument had been field-tested by a jury of experts in the field of school administration and by the new board members from the board of education of Palisades Community Consolidated School District 180, DuPage County, Illinois. The survey was then sent to the forty-four public school districts in DuPage County, Illinois,

for superintendents and new board members to respond to. In addition, personal interviews were conducted with nine superintendents and nine new board members. The data presented in this chapter was generated from the surveys returned and from the personal interviews.

Of the forty-four public school districts who were asked to participate in this study by completing the prepared survey, thirty-one superintendents representing thirty-one districts, and twenty-eight new board of education members completed and returned the survey. In addition, nine superintendents and nine new board of education members based on the stratified random sample were interviewed.

Of the forty-two superintendents representing the forty-four school districts (one superintendent serves two boards of education in Downers Grove, School Districts 58 and 99, and in Bensenville, School Districts 2 and 100), 31 superintendents responded within three weeks from the time the survey instrument was mailed out. The thirty-one respondents represent a 73.8% sample return for superintendents. Further, District 16 and 48 returned the survey instruments with letters stating they could not participate in the study because no new board of education members had been elected or appointed in the last seven or five years, respectively. Thus, 31 out of 40 districts eligible to participate in the study returned the survey instrument. The remaining nine superintendents simply did not return the survey by the established due date and no explanations were provided as to their rationale for not participating in the study.

General Characteristics of Respondents and School Districts

The main purpose of the survey was to elicit information pertaining to orientation of new board members toward identified responsibilities, actual orientation programs, methods, and resources. However, additional information was sought in an effort to identify trends, common elements, uniquenesses, pitfalls, and differences pertaining to the orientation of new board of education members. In this section the characteristics described reflected information pertaining to demographics of the school districts and new board of education members.

The thirty-one superintendents responding represented four unit school districts, five high school districts, and twenty-two elementary school districts. The new board members responding represented three unit districts, two high school districts, and twenty-two elementary districts from the school districts corresponding to the superintendents responding. Table 1 represents the size of districts responding by type of school district. The size of these school districts, as reflected by their enrollments, varied considerably. The range of enrollments was from a low of 172 students (elementary district) to a high of 12,438 students (unit district).

TABLE 1

Size of District Responding - Student Enrollment

Type of District	Number of Districts	Range of Enrollments	Mean Enrollment	Mean Enrollment
Unit	4	1,918 - 12,438	4,644	2,109
High School	5	1,521 - 7,917	4,306	2,607
Elementary	22	172 - 3,978	1,590	1,160
Combined	31	172 - 12,438	2,338	1,925

TABLE 2District Enrollments of 31 Respondent Districts

<u>Less than 501 students</u>	<u>- 12%</u>
<u>501 - 1000</u>	<u>- 23%</u>
<u>1001 - 3000</u>	<u>- 42%</u>
<u>3000 - 5000</u>	<u>- 13%</u>
<u>More than 5000</u>	<u>- 10%</u>
	<u>100%</u>

The mean enrollment for the thirty-one districts was 2,338 students, while the median enrollment was 1,925 students. Almost one half the districts participating had enrollments within the range of 1001-3000 students. Table 1 presents the size of the participating districts.

The wealth of school districts was also reviewed. The respondents were asked to provide the 1979 assessed valuation. The 1980 pupil enrollment figures were obtained from the DuPage County Educational Service Region to determine wealth as a factor of enrollment. As with the enrollments of the districts, the wealth of districts varied considerably. The range of wealth was from a low of \$33,975 assessed valuation per pupil enrollment, to a high of \$318,933 per pupil enrollment. The mean wealth utilizing this factor was \$78,166, while the median was \$69,547. Table 2 further delineates the wealth of the school districts.



TABLE 3Wealth of School Districts Based on 1979 Assessed Value  
Per Pupil Enrollment for Responding Districts

Type of District	Number of Districts	Range of Wealth	Mean Wealth	Median Wealth
Unit	4	\$33,975 - \$ 54,531	\$ 43,122	\$ 36,705
Secondary	5	\$95,851 - \$318,933	\$152,155	\$108,524
Elementary	22	\$35,341 - \$202,396	\$ 67,723	\$ 55,934
Combined	31	\$33,975 - \$318,933	\$ 78,166	\$ 69,547

The data pertaining to orientation programs for new school board members revealed twenty-seven of the thirty-one responding district provided some form of orientation programs for new school board members. This represents 87% of the school districts. But only twenty of the thirty-one responding districts had a formal program for the orientation of new school board members. Table 4 and Table 5 delineate the existence of orientation and formal orientation programs for new school board members.

TABLE 4Responding Districts Providing Programs  
For New School Board Members

Type of District	Number of Districts	Number Providing Orientation	% Providing Orientation
Unit	4	4	100%
Secondary	5	5	100%
Elementary	22	18	82%
Total	31	27	87%

TABLE 5

Responding Districts Conducting Formal Orientation  
Programs for New School Board Members

Type of District	Number of Districts	Number Conducting Formal Orientation	% Conducting Orientation
Unit	4	3	75%
Secondary	5	4	80%
Elementary	22	13	59%
Total	31	20	65%

Information pertaining to the length of service, sex and occupation of new school board members was requested. Of the thirty-one superintendents responding, the mean length of service as a superintendent was nine years, and the median was eleven years. Thirty superintendents were male and one was female. Of the twenty-eight board members responding, the mean length of service was fifteen months and the median was twelve months. Eighteen board members responding were male and ten were female. Further, seventeen, or 59% of the new board members, had one year of service or less on a board of education. Table 6 and Table 7 delineate the length of service and sex of the respondents.

New board members were requested to provide an occupational status. The respondents' occupations were categorized into six classifications, which were: management; business/sales; health services; engineering; homemaker; and self-employed. Table 8 presents the classification of occupations of the respondents.

TABLE 6Personal Characteristics of Respondents

Respondents	Number Responding	Length of Service		Sex	
		Mean	Median	M	F
Superintendents	31	9 years	11 Years	30	1
New Board Members	28	15 months	12 months	18	10

TABLE 7Percent of New Board Member Respondents by Length of Service

Length of Service In Months	Number of Respondents	%
1 - 6	2	7
7 - 12	15	52
13 - 18	2	7
19 - 24	9	34

TABLE 8Percent of New Board Member Respondents by Occupation

Occupation Classification	%
Management	28
Business/Sales	25
Health Services	19
Self-Employed	6
Homemaker	11
Engineering	11
Total	100

The affiliation of the districts' school board with other school board organizations was also requested on the survey. Three affiliations

were noted most frequently by the responding thirty-one districts. The affiliations of the local school boards were with the Illinois Association of School Boards (97%); National School Boards Association (65%); and with Ed-Red, (48%), a consortium of Northern Illinois School Districts which provides research data and direct input for lobbying efforts in the Illinois General Assembly. Table 9 presents the data regarding affiliations of local school boards with other school board organizations.

TABLE 9

School Board Affiliation with Other School Board Organizations

Type of District	Illinois Assoc. School Boards		Affiliation with National School Boards Association		Ed-Red Legislative	
Unit	4	100%	3	75%	0	0%
Secondary	5	100%	5	100%	4	80%
Elementary	21	96%	12	55%	11	50%
Combined	30	97%	20	65%	15	48%

An Overview of Responses Received from Superintendents and New Board of Education Members on Boardmanship Responsibilities

While the above data describe the overall general characteristics of the respondents and the school districts they represent, the remaining data obtained from the survey instruments and interviews were more specific to the orientation of new school board members toward boardmanship responsibilities.

Because the literature suggested a number of responsibilities for board members, the respondents were requested to rank the following fifteen most commonly cited boardmanship responsibilities:

1. Development of policy
2. Working relationship with superintendent
3. Public relations with community and staff
4. Knowledge of school finances including budgeting, levying, and bond issues
5. Evaluation of superintendent
6. Knowledge of curriculum and instructional programs
7. Legal authority, responsibilities, and liabilities
8. Knowledge of personnel practices including staff selection and evaluation
9. Collective bargaining
10. School board organization and meeting operations
11. Interpersonal relationships with other board members
12. Selection of superintendent
13. Facility planning related to enrollment and programs
14. Establishing broad program goals
15. Board and program accountability

The responses that were provided were computed in terms of the mean and the mode response per item. The mode per item was recorded because the most frequently occurring response provided additional insight pertaining to the importance of boardmanship responsibilities. The data were tabulated for two groups of respondents; superintendents and new board members.

Superintendent respondents ranked the boardmanship responsibilities as follows, with one being the most important and fifteen the least important:

1. Development of policy
2. Working relationship with superintendent
3. Selection of superintendent
4. Establishing broad program goals
5. Evaluation of superintendent
6. Public relations with community and staff
7. Board and program goals
8. Legal authority, responsibilities, and liabilities
9. Knowledge of school finance including budgeting, levying,  
and bond issues
10. School board organization and meeting operations
11. Interpersonal relationship with other board members
12. Collective bargaining
13. Knowledge of curriculum and instructional programs
14. Knowledge of personnel practices including staff selection  
and evaluation
15. Facility planning related to enrollment and programs

The new board member respondents ranked the board member's responsibilities as follows, with one being "most important" and fifteen being "least important."

1. Development of policy
2. Knowledge of school finance including budgeting, levying,  
and bond issues
3. Working relationship with superintendent
4. Evaluation of superintendent
5. Establishing broad program goals

6. Board and program accountability
7. Selection of superintendent
8. Public relations with community and staff
9. Knowledge of curriculum and instructional programs
10. Legal authority, responsibilities, and liabilities
11. School board organization and meeting operations
12. Facility planning related to enrollment and programs
13. Interpersonal relationship with other board members
14. Knowledge of personnel practices including staff selection and evaluation
15. Collective bargaining

It should be noted that four boardmanship responsibilities ranked by the new board members were bi-modal suggesting possible different implications or importance attached to these responsibilities by new board members. The data depicting the respondents' ranking of boardmanship responsibilities are presented in Table 10 for superintendents and Table 11 for new board members.

TABLE 10

Distribution, Mean and Mode of SuperintendentsRanking of Boardmanship Responsibilities

Boardmanship Responsibilities	<u>Distribution</u>															Total Responses	Mean	Mode
	*1	2	3	4	5	6	7	8	9	10	11	12	13	14	*15			
Development of policy	11	7	5	2	2	1	1	0	0	0	0	0	1	0	1	31	3.1	1
Working relationship with superintendent	5	6	10	7	0	1	0	0	0	1	0	0	0	0	0	31	3.3	3
Public relations with community and staff	1	0	0	3	5	3	4	4	6	1	1	3	0	0	0	31	7.3	9
Knowledge of school finance including budgeting, levying, and bond issues	0	2	2	2	1	2	0	5	3	3	4	3	3	1	0	31	8.6	8
Evaluation of superintendent	0	3	2	6	3	1	3	4	2	0	0	1	4	1	1	31	7.1	4
Knowledge of curriculum and instructional programs	0	1	0	0	2	2	1	1	0	3	5	5	6	5	0	31	10.7	13
Legal authority, responsibilities and liabilities	2	1	2	2	2	2	0	2	3	7	4	2	0	2	0	31	8.0	10
Knowledge of personnel practices including staff selection and evaluation	0	0	1	0	1	1	0	2	1	3	7	3	4	4	4	31	11.2	11
Collective bargaining	0	0	1	2	3	1	3	0	4	1	2	1	3	2	8	31	10.3	15
School board organization and meeting operations	2	2	3	1	1	1	1	1	5	3	1	0	3	4	3	31	8.7	9
Interpersonal relationship with other board members	0	2	1	1	3	3	2	3	1	3	1	7	0	2	2	31	8.8	13
Selection of superintendent	10	7	3	0	1	0	1	1	1	0	0	0	0	2	5	31	5.3	1
Facility planning related to enrollment and programs	1	0	0	0	0	1	2	2	2	1	3	2	7	5	5	31	11.5	13
Establishing broad program goals	0	2	2	2	5	6	5	2	2	2	1	1	0	1	0	31	6.6	5
Board and program accountability	0	0	0	2	3	5	7	3	0	6	2	2	0	0	1	31	7.9	7

\*1 = Highest Ranking

\*15 = Lowest Ranking



TABLE 11

Distribution, Mean and Mode of New Board MembersRanking of Boardmanship ResponsibilitiesDistribution

<u>Boardmanship Responsibilities</u>	*1	2	3	4	5	6	7	8	9	10	11	12	13	14*	*15	Responses	Mean	Mode
Development of policy	7	4	0	4	2	5	1	1	1	0	0	1	0	0	0	26	4.1	1
Working relationship with superintendent	3	5	4	2	1	1	2	2	2	3	0	1	0	0	0	26	5.2	2
Public relations with community and staff	0	0	4	3	1	3	2	1	3	3	1	1	0	3	1	26	7.9	3
Knowledge of school finance including budgeting, levying, and bond issues	3	7	3	1	3	1	2	1	2	0	1	2	0	0	0	26	4.9	2
Evaluation of superintendent	1	3	4	3	3	1	2	2	1	3	0	0	1	2	0	26	6.2	3
Knowledge of curriculum and instructional programs	0	1	1	2	1	2	4	3	1	1	2	3	4	1	0	26	8.4	+
Legal authority, responsibilities and liabilities	3	0	0	1	1	3	2	3	1	1	2	2	4	1	2	26	8.8	13
Knowledge of personnel practices including staff selection and evaluation	0	0	1	1	1	0	0	1	4	3	7	5	0	1	2	26	10.3	11
Collective bargaining	1	0	0	3	1	0	1	1	3	1	0	2	5	2	6	26	10.6	+
School board organization and meeting operations	1	0	2	1	3	2	1	1	0	1	2	4	3	3	2	26	9.4	12
Interpersonal relationship with other board members	0	1	2	1	2	2	1	2	1	0	4	1	1	4	5	26	10.2	15
Selection of superintendent	5	3	1	2	2	0	0	0	1	3	1	1	0	2	5	26	7.6	+
Facility planning related to enrollment and programs	0	0	2	2	1	1	2	1	1	2	1	1	6	4	2	26	9.7	13
Establishing broad program goals	2	1	2	2	2	3	3	4	0	4	1	1	0	1	0	26	6.6	+
Board and program accountability	0	1	0	0	2	2	3	2	4	1	6	1	2	2	0	26	6.7	11

\*1 = Highest Ranking

\*15 = Lowest Ranking

+ = Bi-modal

An Overview of the Importance of Orientation  
Toward Boardmanship Responsibilities

The respondents were requested to rank the importance of orientation toward the same boardmanship responsibilities on a typical Likert scale. For each responsibility the respondents ranked the importance on a scale of "extremely important," "important," "little importance," and "no importance." Again, the data are presented from two groups of respondents, superintendents and new board members.

The development of policy, working relationship with the superintendent, evaluation of the superintendent, selection of the superintendent, and establishing broad program goals were rated "extremely important" items for orientation of new board members by the superintendent respondents. The remaining ten boardmanship responsibilities were all ranked "important."

New board members ranked the development of policy, working relationship with the superintendent, knowledge of school finance, and the selection of the superintendent as "extremely important" responsibilities for the orientation of new board members. The remaining eleven responsibilities were all ranked as "important."

Both respondent groups ranked the fifteen boardmanship responsibilities as important or extremely important for orientation of new board members. No responsibility listed was considered of little or no importance by the majority of the fifty-nine respondents. The data described above are presented in Table 12 and Table 13.

TABLE 12

Distribution, Mean and Mode of Superintendents Ranking of Importance ofOrientation Toward Boardmanship ResponsibilitiesDistribution

Boardmanship Responsibilities	**4	3	2	*1	Total Responses	Mean	Mode
Development of policy	24	7	0	0	31	3.77	4
Working relationship with superintendent	26	4	1	0	31	3.81	4
Public relations with community and staff	11	19	1	0	31	3.32	3
Knowledge of school finance including budgeting, levying, and bond issues	8	23	0	0	31	3.26	3
Evaluation of superintendent	18	13	0	1	31	3.61	4
Knowledge of curriculum and instructional programs	2	25	4	0	31	2.94	3
Legal authority, responsibilities and liabilities	5	23	3	0	31	3.06	3
Knowledge of personnel practices including staff selection and evaluation	1	22	8	0	31	2.77	3
Collective bargaining	8	18	5	0	31	3.10	3
School board organization and meeting operations	8	21	2	0	31	3.19	3
Interpersonal relationship with other board members	10	14	7	0	31	3.10	3
Selection of superintendent	21	6	4	0	31	3.55	4
Facility planning related to enrollment and programs	8	16	6	1	31	3.00	3
Establishing broad program goals	16	12	3	0	31	3.32	4
Board and program accountability	12	18	1	0	31	3.35	3

\*\*Extremely Important

\*No Importance

Distribution, Mean and Mode of New Board Members Ranking of Importance ofOrientation Toward Boardmanship Responsibilities

Boardmanship Responsibilities	<u>Distribution</u>				Total Responses	Mean	Mode
	**4	3	2	*1			
Development of policy	13	12	2	1	28	3.22	4
Working relationship with superintendent	17	9	2	0	28	3.54	4
Public relations with community and staff	7	18	2	1	28	3.11	3
Knowledge of school finance including budgeting, levying, and bond issues	19	9	0	0	28	3.68	4
Evaluation of superintendent	12	15	1	0	28	3.39	3
Knowledge of curriculum and instructional programs	7	18	3	0	28	3.14	3
Legal authority, responsibilities and liabilities	10	16	1	0	27	3.33	3
Knowledge of personnel practices including staff selection and evaluation	4	18	5	1	28	2.89	3
Collective bargaining	9	10	5	3	28	2.82	3
School board organization and meeting operations	8	14	4	2	28	3.00	3
Interpersonal relationship with other board members	5	15	5	3	28	2.79	3
Selection of superintendent	14	6	6	2	28	3.14	4
Facility planning related to enrollment and programs	5	19	3	1	28	3.00	3
Establishing broad program goals	9	17	1	1	28	3.21	3
Board and program accountability	8	19	1	0	28	3.25	3

\*\*Extremely Important

\*No Importance

An Overview of Response Received from Superintendents and New Board Members on the Methods and Resources Utilized for Orientation

The fifty-nine respondents were requested to identify the methods utilized for orientation of new board members utilized in their district for the fifteen boardmanship responsibilities listed. The respondents reported that reading materials, discussion and lectures were utilized 50% or more of the time as orientation methods for fourteen of the fifteen boardmanship responsibilities. The method most frequently reported for orienting new board members toward the responsibility of "interpersonal relationship with other board members" was on-the-job experience.

It should be noted that the boardmanship responsibility for the selection of a superintendent had the highest percentage of respondents stating that no orientation was given or orientation was gained through on-the-job experience, but yet was previously ranked as one of the most important boardmanship responsibilities by the same respondents. The data gathered on the methods utilized for the orientation of new board members are presented in Table 14.

TABLE 14

Type and Frequency in Percent of Orientation Methods Utilized by Responding  
School Districts for Boardmanship Responsibilities

Methods

Boardmanship Responsibilities	Reading Materials	Role Playing	Written Exercises	Lecture	Discussion	On the Job Experience	No Orientation	Total	Total Responded
Development of policy	33	0	5	6	35	21	0	100	63
Working relationship with superintendent	22	2	6	9	27	31	3	100	64
Public relations with community and staff	29	6	3	13	10	29	10	100	48
Knowledge of school finance including budgeting, levying, and bond issues	35	0	4	16	16	29	0	100	69
Evaluation of superintendent	21	0	19	6	28	24	3	100	72
Knowledge of curriculum and instructional programs	32	4	4	9	31	20	0	100	75
Legal authority, responsibilities and liabilities	39	0	3	20	18	20	0	100	66
Knowledge of personnel practices including staff selection and evaluation	23	3	2	14	35	23	0	100	65
Collective bargaining	23	7	4	12	23	26	5	100	73
School board organization and meeting operations	23	3	6	12	28	28	0	100	65
Interpersonal relationship with other board members	16	2	2	9	26	44	0	100	43
Selection of superintendent	31	0	8	6	21	15	19	100	48
Facility planning related to enrollment and programs	22	0	5	10	35	25	3	100	63
Establishing broad program goals	23	0	20	7	32	14	4	100	69
Board and program accountability	27	0	6	8	33	19	7	100	64
All responsibilities above	27	3	6	10	27	24	3	100	947

The respondents were also requested to identify the resources utilized to orient new board members, and further identify the five resources considered to be most helpful in orienting new school board members. The data by school district revealed that the superintendent was the most frequently used resource (16%). The Illinois School Board Association publications were the next most frequently used resource (12%); while the local orientation sessions, school board president, other staff professionals, Illinois Association of School Boards "Board Member Orientation Clinic," and other Illinois Association of School Boards workshops were all utilized equally (10%) by the school districts. The data concerning the resources utilized by school districts are reported in Table 15.

The resources for orientation reported most frequently used by the respondents were: 1. The superintendent, 98%; 2. I.A.S.B. "New Board Member Workshop;" 3. I.A.S.B. publications; 4. Other staff professionals and school board president, 68%; 5. I.A.S.B. Boardmanship Handbook and other I.A.S.B. workshops, 56%. The least utilized resources were from the National School Boards Association.

The most helpful resources reported by both groups of respondents was the superintendent, then the I.A.S.B. "New Board Member Workshops." It should be noted that 61% of the superintendents reported the I.A.S.B. publications were the most helpful resource while only 25% of the new board members considered this resource as most helpful. Further, 52% of the superintendents consider local orientation programs as most helpful, while only 32% of the new board members consider this resource as most helpful. The data gathered on the resources utilized for orientation and most helpful to new board members are presented in Table 16.

TABLE 15

Frequency of Resources Utilized by School DistrictsResponding in Percent

<u>Resources</u>	<u>Total Resources</u>	<u>Percent</u>
School board president	20	10
Superintendent	30	16
Other staff professionals	20	10
Local district orientation	20	10
Boardmanship handbook	15	8
I.A.S.B. new member workshop	20	10
I.A.S.B. publications	23	12
I.A.S.B. annual convention	11	6
I.A.S.B. other workshops	20	10
N.S.B.A. convention	7	4
N.S.B.A. publications	9	5
N.S.B.A. academy programs	0	0
Total		100%



TABLE 16

Type and Frequency in Percent of Resources UtilizedAnd Most Helpful Resources by New BoardMembers and Superintendents

	School board president	Superintendent	Other staff professionals	Local district orientation	Boardmanship handbook	I.A.S.B. new member workshop	I.A.S.B. publications	I.A.S.B. annual convention	I.A.S.B. other workshops	N.S.B.A. convention	N.S.B.A. publications	N.S.B.A. academy programs
Resource Actually Used	68	98	68	54	56	75	69	41	46	19	25	5
Most Helpful Resource - New Board Member	64	82	54	32	36	68	25	21	32	11	4	0
Most Helpful Resource - Superintendents	74	90	45	52	42	68	61	6	23	3	6	0

N = 28 new board members

N = 31 superintendents

N = 59 total respondents

An Overview of Orientation Programs Utilized by DuPage County,  
Illinois School Districts to Orient New School Board Members

As previously reported, twenty of the thirty-one responding school districts reported that formal orientation programs exist for the orienting of new school board members. From the twenty districts, nine superintendents and nine new board members were asked to provide additional information pertaining to the orientation programs utilized in their district. The respondents were asked to describe:

1. The orientation program in existence in their district.
2. What boardmanship responsibilities were considered in the orientation program.
3. Who determined the topics for orientation.
4. What are the purposes of orienting new school board members.
5. How can their present orientation program be improved.

All eighteen respondents representing nine school districts reported local orientation was formalized and planned to include local orientation sessions and the Illinois Association of School Boards "New Board Member Orientation Workshop," but due to three new board members being appointed after May of 1980, they were not able to attend the association's workshop for new board members, since this workshop is generally scheduled one month after school board elections. The local orientation sessions were planned and directed by the superintendent. In the responding school districts with central office staffs, the business managers, assistant superintendents, and building principals were utilized to orient the new board members. In all but two districts the school board president was also utilized to orient the new board members. The local orien-

tation programs developed have been in existence from two to ten years.

The nine programs described by the respondents generally consisted of a minimum of two sessions of at least three hours, with pertinent reading materials given to the new board members during the sessions. The prevalent methods utilized were reading materials, lectures, discussions, and individual follow-up sessions with the superintendent to answer individual questions. It should be noted that four districts out of nine inform and invite candidates for the position of school board member to participate in orientation sessions before actually being elected and seated on the board. It should also be noted that most orientation sessions are held before a new member actually attends the first board meeting. Further, in three school districts all board members are requested to attend the orientation session. All nine orientation programs are held in the school district, normally in the district office, and then include visitation to the school buildings.

The boardmanship responsibilities covered and discussed varied from district to district, but the most commonly cited responsibilities new board members were oriented toward were:

1. School finance and budgeting
2. Role and authority of the board member and school board
3. Role of the superintendent
4. School board policy including district's philosophy
5. District operations including building operation
6. Recent historical perspective of school district provided through board of education meeting minutes
7. Unique characteristics of the school district
8. Critical future issues or problems

9. Curricular programs
10. Legal aspects and consideration of being a board member
11. Negotiated contracts with employees
12. School board meeting operations.

Other topics discussed or covered by three of the nine responding districts not common to the other six were:

1. Cooperation among board members with value on consensus decision making
2. Importance of working relationship with the superintendent
3. Knowledge of educational acronyms and jargon
4. Status of current projects
5. Relationships with other school board agencies
6. Legislation and the legislative process.

The determination of topics for orientation of the new school board members was universally the job of the superintendent. Two methods were employed by the district superintendent interviewed to determine orientation topics. In the first method, the superintendent solely determined the topics for the orientation sessions based on experience. In the second method, the superintendent evaluated the needs of new board members and structured the orientation session topics based on knowledge of the needs of the new members. The second method was utilized by only four of the nine districts.

The purposes of orienting new board members cited by the eighteen respondents were the same, except for one superintendent. The commonly cited purposes for orienting new board members revealed by the interviews were:

1. Provide basic knowledge needed by board members to function effectively on a board of education.
2. Accelerate the process of becoming an active member of the board, thus preventing non-participatory members.
3. Provide the role expectations of a board member as presented by statute, including corporate rights and responsibilities.
4. Solidify the operation of the board to work productively together.

The one exception to the above commonly cited purposes for orienting new board members was stated by one superintendent interviewed. Besides the four purposes commonly cited, this superintendent stated the most important purposes of orientation were to provide new board members with the knowledge of the decision making process utilized by the board of education, that is, cooperative debate resulting in consensus, and providing the new board member with successful experiences based on the new member's role expectations. The successful experiences provide both the direction and stability for the new member and thus, give the new member a good feeling in operating with other board members, administrators, and constituents.

The description of the orientation programs and processes utilized by the eighteen respondents revealed well developed orientation programs but twelve of the eighteen respondents suggested that improvements could be made in the present programs. Specifically suggested were:

1. Mechanical changes in terms of time, when sessions were held, length of sessions.
2. More specific information concerning the local district based on

the interest of new board member.

3. Requiring all candidates or new board members, by law, to participate in orientation since time commitment of new board members with other functions, job and family related matters, does not allow new members to always attend orientation sessions provided.
4. Follow-up is necessary to make sure the written materials provided new board members are read and understood.
5. Provide special training sessions allowing a new board member to develop specialized knowledge in an area of interest needed by a board of education.
6. Slide presentations on the general operations of the school district.
7. Provide an evaluation component to orientation programs to improve the program.

Six of the respondents indicated no change should be made in present orientation programs provided to new board members.

In summary, this chapter presented the data from surveys and interviews gathered from the defined sample population of superintendents and new board members. The data presented dealt with fifteen boardmanship responsibilities suggested by the literature, the importance of orientation of new board members toward these fifteen responsibilities, the methods utilized to orient new board members, the resources utilized to orient new board members, and factual information concerning orientation programs in existence in DuPage County, Illinois.

## CHAPTER V

### ANALYSIS OF DATA

The overall purposes of this dissertation were to determine from the literature the most accepted responsibilities of boards of education and determine what consistent methods were used to orient new board members for these responsibilities; to identify and analyze actual practices to orient new board members toward the most accepted responsibilities of boards of education within the framework of nine commonly accepted administrative functions; and to analyze the relationship between actual orientation practices and what the literature suggested about orientation practices.

Specifically, four questions were posed in this study. They are:

1. For what responsibilities should new board members be trained?
2. What opportunities and resources were available for new board members during the first crucial months or years for orientation?
3. Who was responsible for the present orientation of new board members?
4. How can existing orientation programs be improved to relate to the responsibilities new board members undertake?

To achieve the purposes of this dissertation data were collected from superintendents and new board of education members. The information requested from those sources focused on demographic information, personal characteristics, and information pertaining to the orientation of new board members toward identified responsibilities. In addition, when a

superintendent or new board members indicated the existence of a formal orientation program, interviews were held with nine randomly selected superintendents and nine new board members to obtain detailed information on the orientation practices, methods, and resources utilized by the nine school districts.

Chapter IV provided a presentation of the data which was primarily based upon the information that was recorded on all the surveys returned and from the interviews. Chapter V provides a comparative analysis of the responses from superintendents and new board members to nine administrative functions developed by Stephen J. Knezevich, and a comparative analysis of responses from superintendents and new board members concerning boardmanship responsibilities, importance of orientation toward those responsibilities, methods, and resources utilized, and most helpful resources for orientation. In addition, Chapter V draws upon the information obtained from interviews conducted with superintendents and new board of education members concerning orientation. The analysis narratively describes trends, commonalities, differences, pitfalls, interpretations, and other possible explanations for the data.

In an effort to present an analysis of these data in a manageable format, the analysis is sub-divided as follows:

1. An Analysis of the Relationship Between Orientation Practices Utilized to Orient New Board of Education Members and Commonly Accepted Administrative Functions
2. A Comparison to What the Literature and Respondents Revealed Pertaining to Boardmanship Responsibilities



3. An Analysis of Board Member Orientation Expectancies and Actual Orientation Practices

An Analysis of the Relationship Between Orientation Practices Utilized to Orient New Board of Education Members and Commonly Accepted Administrative Functions

It was assumed for the purposes of this study that orientation programs and practices would be directly related to commonly accepted administrative functions, since the literature commonly cited the superintendent of schools or a school board association as the main providers of orientation for new board members. A number of authorities have presented their views pertaining to administrative functions. In essence, the authorities have suggested that persons occupying administrative positions must perform some basic functions. While the functions presented by the various authorities differ slightly, there was some agreement regarding the functions.

Because there was some general agreement that administrators must perform some basic functions, it was assumed for the purpose of this study, that if orientation for new board members was to be successful, such orientation practices were dependent on the administrators performing basic functions, since preparation and implementation of orientation includes basic organization and management functions. Therefore, an effort was made to determine the relationship between existing orientation practices for new board members in DuPage County, Illinois, and nine commonly accepted administrative functions.

To accomplish the above, two decisions were made. First, it was necessary to select suggested administrative functions presented by one

authoritative source. After a review of the alternatives available it was decided to select nine of the sixteen functions presented by Stephen J. Knezevich for the purposes of comparison. Nine functions were selected because they include functions noted by other authorities and because they were fairly recent (1975) compared to other functions. Further, the nine functions were directly related to the orientation practices suggested in the literature. The functions selected were anticipating (planning), programming, organizing, staffing, resourcing, executing, coordinating, communicating, and controlling. Second, it was necessary to gather written materials and descriptions of the orientation programs utilized in DuPage County, Illinois. The written materials were obtained or reviewed, and verbal descriptions were obtained from nine school districts out of twenty who reported a formal orientation program for new board members.

The written materials and orientation program descriptions provided by nine superintendents and nine board members, were examined by program components to determine who, what, where, why, when, and how much, concerning the orientation program. This examination was utilized to match orientation program components utilized by the various boards of education with an accompanying administrative function.

The Knezevich functions chosen are delineated below to provide a frame of reference as to the meaning of each function. The nine functions are:

#### Anticipating

The administrator is responsible for anticipating what future conditions may confront the educational institution. Administrators are expected to look ahead and beyond day to day problems. Planning as a process of sensing future conditions and needs is synonymous with the anticipating function.

### Programming

Objectives are a declaration of intent or hope; they are not self-executing. Programming begins with the generation of alternatives or strategies that can be used to reach an objective. It ends with the selection of the alternative or strategy to be followed.

### Organizing

This function focuses on creating a structured framework for inter-related positions required to satisfy the demands of objectives and programs.

### Staffing

People are needed to implement a strategy. Identifying, employing, assigning human resources needed to pursue an objective and fulfill program demands are all part of a staffing function.

### Resourcing

This unusual word is used to describe the process of acquiring and allocating the fiscal and material resources needed to pursue an objective and/or program. The administrator is held responsible for processing needed resources.

### Executing

These are day by day operating functions that command the attention of all administrators. These are related to the actual performance of assigned responsibilities.

### Coordinating

Where there are many in an organization, there is always the possibility that some may be working at cross purposes. The administrator has the responsibility to unify the activities of various components and to focus the functions of discrete units onto objectives.

### Communicating

This function is concerned with the design of information channels and networks as well as the supply of relevant information in the form most useful to the various points in the system. It provides for the information flow essential to other functions, such as unification, motivation, and decision making.

### Controlling

This is controlling in the best sense of the term, mainly monitoring progress toward objectives, keeping organizational activities locked

onto objectives and ready to implement corrective action strategies when the organization strays too far from objectives.<sup>1</sup>

Frequency of Items Noted in Orientation Programs  
Examined That Could be Identified as Administrative Functions

As a means of analyzing the relationship between orientation programs for new school board members and the nine administrative functions chosen for this analysis, a frequency chart was devised. Each of the nine functions was listed, and then the frequency of its use in orientation programs was noted. The items noted in the orientation programs were noted. The items noted in the orientation programs described were not necessarily synonymous with the Knezevich functions. Therefore, a criterion was established to determine whether or not a program component identified from an orientation program should be placed into a category of the administrative functions. The criterion used was that of similarity; that is, whenever a program component was noted in an orientation program that was similar to the description Knezevich provided for a particular function, that program component was accepted and tallied with that particular administrative function. Table 17 presents the frequency of components noted from orientation programs utilized to orient new board members that could be identified as a particular Knezevich function from the respondents interviewed.

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<sup>1</sup>Stephen J. Knezevich, Administration of Public Education, 3rd ed., (New York: Harper and Row, Publishers, 1975), pp. 37-38.

TABLE 17

Frequency of Components Noted from Orientation Programs Utilized  
To Orient New Board Members that Could be Identified as a  
Particular Knezevich Function

<u>Knezevich Function</u>	<u>Number of Components Noted from Orientation Programs for New Board Members that Could be Identified as a Particular Knezevich Function</u>
<u>Communicating</u>	18
<u>Resourcing</u>	18
<u>Staffing</u>	16
<u>Organizing</u>	16
<u>Executing</u>	14
<u>Anticipating (planning)</u>	12
<u>Controlling</u>	5
<u>Coordinating</u>	4
<u>Programming</u>	4

After all the orientation program components had been identified in accordance with the appropriate Knezevich function, it was determined that all of the Knezevich functions did play some part in the various orientation programs for new board members. However, the frequency of program components appearing that could be identified as Knezevich functions varied from all the programs to one-third of the programs examined. The following discussion presents each of the Knezevich functions in relation to the frequency that each function could be identified in the orientation programs examined. The discussion is for the purpose of analysis and presents possible implications for the findings.

The two most frequently found Knezevich functions were communicating and resourcing. These two functions were found in all orientation programs examined and identified by all eighteen respondents. These functions were apparently important to both superintendents and new board members, and the respondents saw these functions as the most important responsibilities for the superintendent to carry out an effective orientation program.

Communicating - This function was noted in each of the orientation programs examined. This function also existed on three levels. Those levels included; one, information about the availability of orientation sessions; two, orientation program agendas and topics; and three, understanding of subject matter presented to new board members, as the subject matter related to a board member's performance. Since this function was apparently very important to the orientation process and the main function of the superintendent, the superintendent should carefully examine the procedures that are utilized for communicating at the three different levels that exist, and should establish systems known to new board members and candidates for election to a board of education. Such established systems should facilitate the communication process.

Superintendents must recognize that the communication process occurs at the three levels cited above and includes both written and verbal communication to new or prospective board members in order to have an effective orientation program. The initial communication should be informative to both candidates for election to a board of education and to new board members. Initial communication about orientation from the superintendent is important in establishing the role of the superintendent in

the process of orientation, providing the new board member with an initial understanding of the role of the superintendent; and can provide the beginning of successful future communication between the superintendent and board of education member.

The respondents to the interview alluded that both written and verbal communication methods, if utilized, should stress the availability and importance of orientation, provide agenda topics to be covered during orientation in order to provide the new member with a guide as to the importance of the board member and the responsibilities the board member must undertake. The communication process should facilitate understanding of board members' responsibilities by providing a follow-up or debriefing session after orientation has occurred. The debriefing component found in the orientation programs examined can provide an opportunity for the new board member to meet and discuss with the superintendent the individual concerns on a personal basis. The debriefing component can give the new board member a view of the leadership style of the superintendent, that is, by utilizing a follow-up component on a personal basis the new board member might realize the superintendent values personal considerations and develop the beginning of a trustful and respectful relationship between the new board member and the superintendent.

The third level of the communicating function stressed by both superintendents and new board members was the understanding of subject matter presented to new board members as it related to board member performance. New board members want to be informed and superintendents want an effective operating board of education. Since the amount of information the new board member must assimilate during orientation is vast and

on a multitude of topics and responsibilities, superintendents should consider a systematized approach to communicating this information. A systematized approach to communicating information to new board members will tend to simplify the process for new board members by organizing the orientation topics and sessions into a manageable format. Further, a systematized approach with an evaluation component to the communicating function can provide an important segment of the process; that is, does the new board member understand what has been communicated.

Of the communication components found in the orientation programs examined in the study, a few components tend to enhance the communication function. These components are: 1) multiple sessions within a time frame convenient and available to new members; 2) reading materials correlated to the topic of the orientation session and given to the new member to study before the actual orientation session; 3) orientation topics based on the responsibilities of board members and boards of education; 4) evaluating the need for further training after orientation and actual experience on the board of education; and 5) a follow-up orientation session after sixty to ninety days of actual on-the-job experience as a board member.

Resourcing - This function was also noted in all the orientation programs examined and was identified in all the systems on a material and personnel basis; but only twelve of the eighteen respondents interviewed could identify the amount of money spent on orientation. The concern to provide written materials, time of district personnel, and utilization of the Illinois Association of School Boards' "Board Member Orientation Clinics" was clearly apparent in the programs examined in order to give the new board member the knowledge needed to function effectively as soon



as possible.

Both boards of education and the superintendents should concern themselves with providing the necessary resources found to be most helpful to new board members. Those resources as reported by the study respondents are the superintendent, Illinois Association of School Boards publications, especially "Guidelines for Effective School Board Membership," the Illinois Association of School Boards' "Board Member Orientation Clinic," school board president, other district administrators including building principals, and other Illinois Association of School Boards workshops, including county division dinner meetings.

If orientation is to be successful for new board members, effective resources must be utilized, and some resources were considered by the respondents as more effective than others. This administrative function, resourcing, tended to be the responsibility of the superintendent, board of education, and school board affiliate organizations as revealed by the respondents. If boards of education do not commit monetary resources, and thus indirectly the time and staff to aid the superintendent in orienting new board members, then the possibility exists that the lack of orientation could lead to the ineffective operation of the board. On the other hand, providing the monetary resources even in times of tight budgetary constraints at least provides the initial resource to provide orientation.

Further, another relevant factor to ensure the resourcing function might be a policy by a board of education ensuring that orientation of new members takes place. The policy, if written, to develop new board members into functioning members might provide a guideline for the superintendent to operate from. If orientation was mandatory by board policy, the

conditions of entry of the new board member might be improved by dictating the training necessary for a new member to become an effective member of a board as quickly as possible. Further, a board policy dictating the training of new members, if implemented, might eliminate the bumbling curiosity of the new member and avoid some of the ineffectiveness of new board members reported by some of the respondents of this study.

Staffing - This administrative function was identified sixteen times in the examination of orientation programs by the respondents. This function dealt with the description of assigning human resources needed to fulfill orientation program objectives. All the orientation programs examined involved the utilization of the superintendent and board of education president. Large school districts with central office staffs involved central office administrators and building principals. The use of multiple human resources for orientation might tend to enhance the quality of orientation programs for new board members, since the utilization of multiple human resources can possibly give the new board member insights, knowledge, and specific details of school operations not necessarily known by the superintendent and board of education president.

The superintendent might consider various staffing options for orientation by using experienced board members or consultants who can provide subject and expertise without biased opinions about a school district. The staffing function can provide the superintendent with a public relations opportunity by providing the new board member with the origins of interpersonal relationship between the superintendent and new board member or between the new board member and other district administrators, board consultants and other board members. The utilization of staffing options

can be decided at the local level, but the superintendent might realize the control of this function is important in developing a partnership concept in integrating the new board member to have a feeling of trust and confidence in the superintendent, other administrators, and the board of education.

An important factor revealed by some of the respondents from this study was to provide the new board member with a balanced and unbiased view of the operations of the school district. In light of this factor superintendents might utilize a staffing option of an outside consultant with topic area expertise without biased opinions. An example might be, to utilize the board of education's attorney, to provide the new board members with the knowledge, facts, and information concerning the legal duties and obligations of a school board member and the school board, and update the new board members on possible pending litigation.

Therefore, the staffing function is important for the superintendent to take advantage of in orienting new board members in order to develop the necessary interpersonal relationship with the new members, in shaping his leadership image with the new members and in providing the knowledge and information new board members need to know about the school district.

Organizing - This Knezevich function was identified sixteen times by the respondents. The respondents and written policies examined suggested that the superintendent was responsible to organize orientation programs for new board members. In addition, it was noted the superintendent was expected to administer and supervise the operation of the orientation programs, including arrangements for new board members to attend the Illinois Association of School Boards orientation clinic and other association

workshops. The organization of the orientation programs examined suggested that effective programs are held in multiple sessions at the district level of no more than twelve hours and attendance at the Illinois Association of School Boards' "Board Member Orientation Clinic."

The superintendent should realize the organization function spells the difference between successful and effective orientation programs or unsuccessful and ineffective orientation programs. The leadership and management skills of the superintendent and the leadership of the Illinois Association of School Boards in providing orientation, which is productive for the new board member, are dependent on organizational development. It seems the framework for organizing orientation is dependent upon the cooperation between the superintendent and the Illinois Association of School Boards, since most of the respondents in the study indicated that the Illinois Association of School Boards' "Board Member Orientation Clinic," in combination with local orientation sessions, were some of the most valuable resources for orientation. Since the Illinois Association of School Boards' clinic for new members was considered one of the most valuable resources by respondents, a cooperative effort between superintendents and the Illinois Association of School Boards might tend to enhance and improve the orientation process for new board members. A cooperative effort might be made in organizing orientation programs between the Illinois Association of School Boards and at the local level by the superintendent for those members who are appointed between elections, and who, at the present time, do not have access to the Illinois Association of School Boards' "Board Member Orientation Clinic."

Further, a recent change in the election law in Illinois (1981)

concerning the date of the regular election for board members will, in the future, extend the terms of board members from two to four years. Regular elections for board members will be held in November of odd numbered years rather than every year in April. While the Illinois Association of School Boards' "Board Member Orientation Clinic" is annually scheduled two to three weeks after board elections, possible considerations should be given to reorganizing the scheduling of the "Board Member Orientation Clinic" to correspond with the new election law and with local orientation programs. The reorganizing of scheduling can provide more effective programs to the orientation of new board members by arranging orientation programs to give the new member the convenient opportunity to participate in both the Illinois Association of School Boards' "Board Member Orientation Clinic" and local orientation sessions.

The superintendent in organizing orientation for new board members can possibly consider other sources for programs and information to coordinate with local orientation sessions, such as the National School Board Association Academy programs or written materials from the same source. The respondents of the study, though, tended to minimize the importance of other sources of orientation resources and thus the superintendent might want to concentrate his efforts in organizing an orientation program utilizing sources at the local level and state association level.

Executing - The Knezevich function of executing was identified fourteen times by the respondents. This function was aligned with the carrying-out of the orientation program as described by the respondents, or written materials provided by the respondents. The analysis of this function brings to light a serious problem of importance to both superin-

tendents and boards of education.

Those problems as cited by the respondents and discovered by comparing superintendent responses to any new board members' responses to the interview questions are: 1) not all new board members attend local orientation sessions because of time constraints or locale restraints in relation to the Illinois Association of School Boards' programs; 2) orientation programs as designed are implemented fully when only more than one new member requires orientation; and 3) other board members or school board presidents who are an integral part of some local orientation programs do not participate for various reasons. These problems allude to the value some experienced board members and superintendents place on orientation; that is, other priorities, either personal or political, are more important than orienting new board members.

The fact that orientation sessions are not well-attended, despite the reasons cited, has legal implications. School board members have some mandated legal duties as defined by the statutes which they may not know about without adequate orientation. Lack of knowledge is no excuse in a legal matter for a school board member. If problems exist with orientation in terms of time and place, these problems can be handled easily on the local level by changing dates, times, or place of an orientation session. The superintendent's stake in this matter is obvious. If the programs of the Illinois Association of School Boards, however good, do not or cannot meet the orientation needs of new board members, something else must be provided. Specific programs will vary in each district, but the active role the superintendent plays in the orientation matter can be a crucial test of his ability to execute and to lead. ✓

Possible legal consideration might also be given by the superintendents, boards of education and their affiliate organizations to sponsor legislation mandating that candidates for election to a board of education participate in an orientation session before a candidate's name can be placed on the ballot by the election authority. This consideration might alleviate to some extent the problems of executing cited previously.

Anticipating - This Knezevich function, synonymous with planning, was identified twelve times from the written materials and interview data. The orientation program components identified were board of education policy on orientation of new board members, administrative regulations on orientation of new board members, letters to candidates for election to a board of education concerning the availability of written materials, meeting with the superintendent of schools, and notices to new board members about Illinois Association of School Boards clinic and workshops provided, either by the superintendent or the Illinois Association of School Boards directly to new board members, and written orientation agendas.

As a result of these findings from the respondents, the superintendent might plan orientation on a constant and on-going basis through the use of a needs assessment with current board members or new board members who have completed orientation. The results of a needs assessment can possibly provide the superintendent with the necessary information needed to plan future orientation programs and forecast possible future informational needs of new members. Since school boards must operate within and abide by changing laws and regulations, the superintendent should ensure an updating of information on a regular basis, thus saving time in preparing for orientation and providing new board members with current, accurate

information relating to the operation of the school district and historical information about the operation of the school district.

The superintendent's role in the planning function is paramount to the success of orientation. For if, without careful planning of all aspects of orientation to give new board members quality orientation programs, the new board members might lack the necessary training to function effectively, cooperatively, and legally, thus leading to an ill-functioning school district which will directly relate to the superintendent's management capabilities.

Controlling - This function was identified five times by the respondents as a component of the orientation programs examined. Orientation programs that provided follow-up activities with the superintendent or school board president at a later date after orientation and actual board meeting experience, proved to be more successful experiences as reported by three new board members in this study.

Although this administrative function was identified only five times by the respondents, superintendents should consider this an important function since the respondents of this study identified the superintendent as the primary resource responsible for orientation of new members. Controlling as an administrative function implies ensuring progress toward objectives according to a plan by establishing a reporting system, developing standards of performance, and measuring results. With board members being the direct superior of the superintendent as a corporate body, the measuring of results and taking corrective action to ensure new board members have accomplished the goals set down before orientation can be a difficult political task. Superintendents in this regard might consider



utilizing the art of persuasion rather than reward or discipline measures in controlling new board members toward the goals of orientation.

Superintendents might consider practical experiences gained in their on-going training programs by their affiliate administrative organizations, then apply the same controlling measures to orientation of new board members. A controlling method that possibly could be utilized with new board members would be follow-up activities after on-the-job experience. This could determine the need for more orientation or supply more information on a particular boardmanship responsibility or duty.

Coordinating - This administrative function was identified four times in the orientation programs examined. Four respondents noted that the Illinois Association of School Boards' "Board Member Orientation Clinic" was an excellent cursory program for new board member orientation, but was not coordinated with local district orientation programs to either time or subject matter. Thus, due to a lack of unified action between superintendents and the Illinois Association of School Boards, subject matter topics were duplicated or not presented. Therefore, in an effort to improve orientation programs, superintendents could ascertain the various components and subject matter topics of the Illinois Association of School Boards' "Board Member Orientation Clinic" in an effort to coordinate the Illinois Association of School Boards program with local orientation program efforts in order to make orientation effective for the training of new board members.

Further, since the superintendent was reported as the main provider of orientation, his leadership and basic management skills can be demonstrated and enhanced by providing a coordination of subject matter topics

basic to the orientation of new board members. The careful coordination of orientation programs at the local level and with affiliate organizations can give the new board member the necessary information and knowledge to operate with on an immediate basis; and a base upon which to build and explore further subject matter needed to function in the future, rather than duplicating subject matter that might lead to dissatisfaction by the new board member or creating a knowledge void which might later lead the new board member to make faulty decisions costly to the board of education and community.

Programming - This function was identified four times through the written materials provided by the respondents. The written materials on orientation provided clearly delineated programming functions of topic importance (priority), sequencing of topic and events, and time consideration. Because of the vast amount of knowledge a new board member needs to assimilate in a short period of time to operate effectively on a board of education, the programming function is an important function for superintendents to structure carefully to maximize the effectiveness of orientation.

Although certain topics are essential for the orientation of new board members based on boardmanship responsibilities, certain emphasis can be placed on topics that are important at the local district level through placement of the topic on the agenda, the amount of time spent on the topic, and the methods utilized to impart knowledge on the topic. As revealed by the respondents of this study, programming was not considered an important administrative function. This was also confirmed by the written materials provided by the respondents, in that the sequencing of

topics and amount of time were different for each district. The reason for the differences as revealed through the interviews of the respondents was that the superintendent was solely responsible for providing the program of local orientation and determined what topics were important for new board members. Therefore, it would behoove superintendents to plan the programming of orientation to provide the necessary knowledge new board members need or want in order to operate with the other members of the board, both on a basic functional level (boardmanship responsibilities) and on the unique characteristics of a school district's operation.

Summary of the Relationship Between Orientation Programs  
Utilized to Orient New Board of Education Members and  
Nine Selected Knezevich Administrative Functions

To some degree, the nine selected administrative functions as noted by Stephen J. Knezevich, were identified as components of orientation programs for new board members. The degree to which these components were included in the orientation programs varied, dependent upon the particular orientation program. However, it was possible to identify all nine functions in only two DuPage County orientation programs for new board members. It would appear that orientation programs are a recent development and the first considerations were not to develop orientation programs on commonly accepted administrative functions, even though the superintendent was identified as the sole planner and organizer of orientation for new board members. Instead, the orientation programs were developed and established by the superintendent or board of education based on experiences of the superintendent and/or experienced board members.

The most frequently recorded responses that could be identified

as an administrative function were "communicating" and "resourcing." These particular functions, as noted previously, had been noted in all the orientation programs in various forms. Both functions were apparently important for the orientation process to superintendents and new board members. Both respondent groups saw these functions as the most important components for the superintendent to implement.

The administrative functions of staffing, organizing, executing, and anticipating (planning) were also identified by the respondents but not to the extent that the functions could be identified in all the orientation programs examined. The above four functions again were apparently the main responsibilities of the superintendents to implement. Of note among these four functions, was the function of organizing. The analysis of the organizing function revealed an effort needs to be made by superintendents and the Illinois Association of School Boards to coordinate the "Board Member Orientation Clinic" and local district orientation sessions to provide maximum effectiveness for the orientation of new board members due to a change in the election law in Illinois, and extension of board members' terms which will likely lead to more new board members being appointed between elections.

The functions of "programming" and "coordinating" were found to be the responsibility of the superintendent and, therefore, controlled by the superintendent. Careful attention to both functions would seem indicative of the superintendent's administrative capabilities and provide the new board member an initial impression, in the case of programming, as to what is important for a new board member to know in order to operate effectively on a board of education.

The orientation programs examined in this study were intensive training programs with compressed time functions and with massive amounts of reading materials for new board members to assimilate in a short period of time. New board members expressed concerns over these factors and suggested written materials be given to new board members before actual orientation sessions are experienced. Further, the new board member respondents suggested orientation sessions be more frequent, shorter in time, but convenient to their personal time schedule. Also, suggested by a majority of new board members were follow-up activities to the orientation sessions after one to three months of on-the-job experience. This component existed in only two of the orientation programs examined and were cursory at best. Superintendents should take into account and consider the importance of the administrative functions of programming, coordinating, and controlling in light of the suggestions made by the new board member respondents.

The nine administrative functions utilized to analyze orientation programs in this study did not exist in all the orientation programs examined in DuPage County, Illinois, but were found in varying degrees in some orientation programs. This finding might suggest that superintendents, who were found in this study to be primarily responsible for the orientation of new board members, do not apply basic administrative functions in implementing orientation. The above finding would be consistent with the literature, since the literature suggests a multitude of different orientation topics, methods, and procedures, without regard to any systematic utilization of administrative or management functions which are necessary to consider and implement in order to have effective orientation for new

board members.

A Comparison to What the Literature Revealed  
Pertaining to Boardmanship Responsibilities  
And the Study's Respondents

The literature reviewed for the purposes of this study clearly indicated that boards of education, and therefore, the members of the board, have various responsibilities to fulfill. In order to fulfill these responsibilities the board member needs specific knowledge which can be or is provided through orientation and/or training. One purpose of this study was to determine what the literature considered the most accepted boardmanship responsibilities.

The review of the literature showed the following responsibilities of boards of education as the most accepted responsibilities in the order of most commonly cited to least commonly cited. The most accepted responsibilities indicated by the literature were:

1. School board organization and operation (role of school board member)
2. Policy development
3. Financial matters including budget planning and tax levies
4. Knowledge of instructional programs
5. Evaluation of personnel (superintendent)
6. Working relationship with the superintendent
7. Personnel practices
8. Community relations
9. Legal responsibilities and authority
10. Facility planning

11. Selection of the superintendent
12. Collective bargaining (negotiations)
13. Establishing broad program goals
14. Interpersonal relationship (group dynamics)
15. Accountability
16. Staff relations
17. Code of ethics for board members
18. Legislation and legislative process
19. Bond and tax referenda
20. Transportation programs
21. Terminology
22. School philosophy

The above boardmanship responsibilities were cited in various forms and ways in the literature but were related to the topics of responsibilities of a board of education, what board members need to know, the basics of boardmanship, and working effectively on a board of education.

For the purpose of this comparison, it will be assumed that the most frequently cited responsibilities in the literature are based on functions a board of education performs as the most commonly accepted responsibilities, since certain responsibilities were mentioned more often than others. Thus, the boardmanship responsibilities from the literature noted above are ranked from the most commonly accepted to the least commonly accepted on the frequency of citation in the literature.

The respondents, both superintendents and new board members of this study, were requested to rank fifteen boardmanship responsibilities identified on the study survey. These fifteen identified commonly accepted

boardmanship responsibilities were cited in the literature. The boardmanship responsibilities listed on the study survey were not worded exactly as noted in the literature, but were written to be synonymous to the responsibilities cited in the literature.

The data received from the twenty-six of twenty-eight new board member respondents and from twenty-two superintendent respondents were ranked by using the mean score obtained for each boardmanship responsibility. The comparative rankings on boardmanship responsibilities are presented in Table 18. The rankings developed from the mean score of the respondents were in substantial agreement concerning nine of the boardmanship responsibilities, but greater differences appeared on six responsibilities. These boardmanship responsibilities as reported in Table 18 were: "school board organization and meeting operations," "knowledge of instructional programs," "personnel functions," "selection of superintendent," "establishing broad program goals," and "accountability."

Since the comparative rankings pertaining to identified boardmanship responsibilities revealed some commonalities among the literature, new board members and superintendents, but also revealed that differences existed in the rankings, the mean rankings as reported in Table 18 were used to determine if a correlation existed between the literature and new board members' rankings and the literature and superintendents' rankings. The rank-difference correlation, ( $r_d$ ), was the statistic used to determine the correlation among the ranked responsibilities and is reported in Table 19.



TABLE 18

A Comparison of Boardmanship Responsibilities Cited from the  
Literature to the Ranking of Identified Boardmanship  
Responsibilities by New Board Member and  
Superintendent Respondents

Boardmanship Responsibilities	Ranking Based on Most Commonly Cited to Least Commonly Cited in Literature	Ranking by New Board Member	Ranking by Super- intendent
School board organization and meeting operations	1	11	10
Policy development	2	1	1
Financial matters	3	2	9
Knowledge of instructional programs	3	2	13
Evaluation of personnel (Superintendent)	5	4	5
Working relationship with superintendent	6	3	2
Personnel practices	7	14	14
Community/staff relations	8/16	7	6/7
Legal responsibilities and authority	9	10	8
Facility planning	10	12	15
Selection of superintendent	11	8	3
Collective bargaining (negotiations)	12	15	12
Establishing broad program goals	13	5	4
Interpersonal relations (group dynamics)	14	13	11
Accountability	15	6	7

TABLE 19

Rank Difference Correlation ( $r_d$ ) Between  
The Rankings of Boardmanship Responsibilities by the Literature,  
New Board Member and Superintendent Respondents

$r_d$  - Boardmanship Responsibilities

+0.364 - Literature and New Board Members
+0.09 - Literature and Superintendents
+0.686 - New Board Members-Superintendents

The rank difference correlations of boardmanship responsibilities revealed that the boardmanship responsibilities used in this study were associated to a greater degree between the superintendent and new board members ( $r_d = +0.686$ ) than between either group of respondents and the literature (Table 19).

The comparative ranking of the data pertaining to identified boardmanship responsibilities revealed some commonalities in that priorities of boardmanship responsibilities identified by the rankings existed among the literature, new board members and superintendents. The boardmanship responsibilities with a common priority as cited in the literature and ranked by new board members and superintendents were: policy development, evaluation of the superintendent, community and staff relations, legal responsibilities and authority.

More importantly were the commonalities revealed by the new board members and superintendents. The new board member and superintendent respondents placed similar priorities on the following boardmanship responsibilities: policy development, evaluation of the superintendent, personnel practices, community and staff relationships, establishing broad program

goals, and accountability. Thus, the comparison of boardmanship responsibilities by ranking could be considered a factor of importance because more differences existed than commonalities as revealed among the literature, new board members and superintendents. These differences suggest different priorities are placed on boardmanship responsibilities in relation to orientation toward these responsibilities. These differences can possibly be explained by the comments made by the respondents during the interviews conducted.

New board members indicated during the interviews that their rankings were based on a lack of experience with certain boardmanship responsibilities, especially "collective bargaining" and "selection of a superintendent," or that their board operated by committee and, therefore, certain boardmanship responsibilities were not a high priority because other members of the board were responsible for a particular function, such as the curriculum or instructional program. The superintendent respondents indicated their rankings were based on their experience of what they considered important responsibilities to have an effective working board.

Further, the superintendents interviewed revealed their ranking of the boardmanship responsibilities was based on their knowledge and training as to what a board member should do and should accomplish as a board member within the parameters defined by law; that is, their rankings were partially based on avoidance of role confusion between the board member and superintendent.

The differences among the rankings of the literature, new board members and superintendents on the most commonly accepted boardmanship

responsibilities may be due to the rapid-changing views in the educational community. The rankings of responsibilities used for literature were based on a majority of the literature dating back ten years, while the survey responses were current. This difference is considered an unimportant factor in analyzing the priority of boardmanship responsibilities by the respondents to the literature and only mentioned as a possibility.

Disparities on the mean rankings among the literature and the respondent groups were specifically noted on the following boardmanship responsibilities:

1. School board operations and meeting operations
2. Knowledge of instructional programs
3. Personnel practices
4. Selection of a superintendent
5. Establishing broad program goals
6. Accountability
7. Financial matters

The literature presented orientation toward school board and meeting operations the most important responsibility for a new board member while the respondent new board members ranked this item "11," and superintendents ranked the same item as "10." The lower ranking by the new board members and superintendents might be due to the respondents considering this responsibility a perfunctory responsibility which is learned through experience at meetings rather than through orientation. If the literature considers this one of the most important responsibilities for orientation of new board members, then superintendents might consider this responsibility in the planning and implementation of orientation

as an item that should be given a high priority for orientation.

"Knowledge of instructional programs" was another boardmanship responsibility where the rankings between the literature and respondent groups revealed a disparity. The respondents ranked this boardmanship responsibility "9" and "13," respectively, for new board members and superintendents, while the literature considered this responsibility more important with a ranking of "4." This difference in ranking might be explained from the interviews conducted during this study. The new board member respondents indicated that information about instructional programs and curriculum was not presented in detail possibly due to the number of programs and complexity of the topic.

While the literature considers this boardmanship responsibility as important for orientation of a new board member, the new board member respondents ranked this responsibility lower than the literature but higher than the superintendents. Since board members must formally approve curriculum and instructional programs and have the final control and responsibility over curriculum, it would behoove the planners of new board member orientation to place emphasis on this boardmanship responsibility in order to give new board members the knowledge needed to make decisions about the curriculum and instructional programs.

The mean rankings on the boardmanship responsibility, "personnel practices," revealed again another disparity. The literature ranked this responsibility "7" while both respondent groups ranked this responsibility lower at "14." The respondents interviewed reported that personnel practices was directly related to the administrative function of their respective districts and not a board responsibility.

It should be noted though that a board of education has the final responsibility for the employment, dismissal, and evaluation of school district personnel. Thus, new board members might consider this responsibility more important if they were involved in a dismissal hearing on an employee. Basic knowledge of personnel practices, including the legal ramifications defined by state statute, should be considered as an orientation topic of importance for new board members.

Differences in the ranking of the boardmanship responsibility, "selection of the superintendent," was also revealed by the survey. The superintendent respondents ranked this responsibility as "3" while the literature and new board member respondents ranked this responsibility much lower; "11" and "8" respectively. Comments made by the respondents on the survey and from the interviews conducted for this study revealed this responsibility was not considered or even addressed in the existing orientation programs examined.

While the literature ranked this responsibility lower than the respondents, the literature considered this a major responsibility of a board of education. The employment of the chief executive administrator of the board of education who implements the policy of the board of education and controls the operation of a school district is one of the most important responsibilities of a board of education and the knowledge needed as to the process utilized, role and job description development for this position seems to be a vital area for new board members to understand. Possibly, the lower ranking by the literature and new board member respondents as compared to the superintendent respondents is due to the infrequency of boards of education of having to employ a superintendent as

compared to the term of a board member. Superintendents, on the other hand, possibly ranked this boardmanship responsibility higher to enhance the importance of the role in which they function.

"Establishing broad program goals" and "accountability" were ranked lower by the literature than the respondents of this study. The respondents of the study revealed during the interviews conducted that a major emphasis was placed on these items during orientation so that board members had logical and rational answers to utilize with the public constituents who had elected them to oversee the operation of the school district. Setting and determining the direction and improvement of a school district's programs, curriculum, and operations is evidently an important responsibility for new board members to understand and to use in a political arena with constituents thus, orientation should place emphasis on these responsibilities even though the literature considers the above-mentioned responsibilities less important for orientation than do new board members and superintendents.

Another boardmanship responsibility that was ranked higher by the literature and new board member respondents, "3" and "2" respectively, than the superintendent respondents, was "financial matters." The possible reasons for this ranking difference was revealed from the interviews conducted. The new board members interviewed stated that most decisions made by the board of education were related either directly or indirectly to the financial state of the school district. Thus, a basic working knowledge of school finances was an essential factor in making decisions.

Eight new board member respondents indicated that they still do not fully understand or have a minimal working knowledge of school finances and

stressed this responsibility should be considered in depth during initial orientation. The superintendent respondents, on the other hand, revealed that new board members should have knowledge of the legal responsibilities of school financial matters, such as, the adoption of a levy and budget, but not necessarily a working knowledge of school finances.

In light of comments made by the respondents of this study, the planner of orientation might consider placing more emphasis on school finances as an orientation topic to give the new board member an initial working knowledge of school finances and legal obligations related to financial matters.

Thus, while differences exist as to the priority placed on certain identified boardmanship responsibilities among the literature, superintendents and new board members for reasons of experience, operational structure of a board of education, the boardmanship responsibilities studied were positively correlated amongst the three, but to different degrees.

#### An Analysis of Board Member Orientation Expectancies and Actual Orientation Practices

The previous chapter provided a presentation of data which was primarily based upon information that was recorded from all the surveys received from superintendents and new board members. This section provides additional analysis of the data by tying together the data obtained from surveys and interviews held with superintendents and new board members. The analysis describes trends, commonalities, differences, pitfalls, and interpretations and possible explanations for the results that have been obtained with the framework of the importance of orientation toward board-



manship responsibilities and actual orientation practices and methods.

#### Observations Based Upon the General Characteristics of Respondents

The respondents in the survey represented a wide range of characteristics in terms of district demographics and personal characteristics. Further, the respondents were divided into two groups - superintendents and new board members. The following analysis has attempted to note commonalities, differences, and trends that were reflected, based upon the above characteristics.

District Demographics - The type, size, and wealth of the participating districts were carefully reviewed. The population surveyed included forty-two superintendents and new board of education members in DuPage County, Illinois, thirty-one superintendents responding. These superintendents represented four unit districts, five secondary districts, and twenty-two elementary districts. The new board members responding represented three unit districts, four secondary districts, and twenty-three elementary districts. Because of the limited number of responses from superintendents and new board members representing unit and secondary districts, absolute conclusions regarding orientation expectancies and actual orientation practices could not be made. The data did reveal that of the thirty-one districts responding, twenty-seven reported orientation for new board members, but only twenty districts reported formal orientation programs for new board members.

Of those twenty districts which reported conducting a formal orientation program, three represented unit districts, four represented secondary districts, and thirteen represented elementary districts. Thus, acknowledg-

ing the limited number of responses from secondary and unit districts which the respondents represented, prohibits any absolute conclusions, the data indicate that formal orientation programs for new board members were more likely to exist in the unit and secondary districts, than those from the elementary districts.

The size of the school districts in terms of student enrollment was examined, to determine whether a relationship existed between the size of the school district and the existence of a formal orientation program for new board members. While at first it appeared formal orientation programs were more prevalent in the unit and secondary school districts, a further analysis suggested this to be true. Table 20 presents the data concerning the size of the school district and existence of a formal orientation program.

Table 20 presents a comparison of the mean enrollment of enrollments in all the districts, the mean enrollment of districts without a formal orientation program, and the mean enrollment of districts with a formal orientation program. The data suggest that formal orientation programs were more prevalent in larger school districts with large being defined as those school districts with enrollments above the median enrollment.

TABLE 20

A Comparison of Mean  $\bar{x}$  Enrollments in Combined Districts, Districts

With No Formal Orientation Program, and Districts with a Formal

Orientation Program for New School Board Members

	$\bar{x}$ Enrollment
<u>All Districts</u>	2,338 N(31)
<u>Districts with no formal orientation program</u>	1,497 N(11)
<u>Districts with formal orientation program</u>	2,943 N(20)

The data indicated that formal orientation programs for new board members were more likely to exist in districts where the enrollments were in excess of 1,925 students as opposed to those with less than 1,925 students. Further, the data from the interviews revealed formal orientation programs were more likely to exist in districts where two or more central office administrators were employed, as opposed to districts where the superintendent was the only central office administrator. ✓

It seemed, however, that if school size were a factor in providing formal orientation programs for new board members, size should be an indirect factor. Other functions, such as importance of orientation toward boardmanship responsibilities, orientation needs of new board members, and purposes of orientation as cited in the literature and found from this study's interview data, seemed more likely to be factors directly related to the existence of formal orientation programs.

The wealth of a school district was believed to be another factor in determining the existence of a formal orientation program for new school board members, and, therefore, examined. The wealth of a school district as determined by assessed value per pupil enrollment when compared to districts in the study having formal orientation programs or no formal orientation programs, showed that the relationship between the existence of a formal orientation program and the wealth of the district was not an important factor.

Another factor examined relative to the existence of a formal orientation program for new board members was school board affiliation with other school board organizations. It was believed that this factor was an important component of orientation programs because the Illinois Association

of School Boards and the National School Boards Association have orientation materials, and the Illinois Association of School Boards, an orientation program for new board members which could be utilized by member school boards to orientate their new members.

The data indicated that almost all the districts represented by the respondents were members of the Illinois Association of School Boards. Thirty of the thirty-one districts were affiliated with the Illinois Association of School Boards, but only twenty reported having formal orientation programs; thus, the factor of affiliation with other school board organizations was determined not to be an important factor in determining the existence of a formal orientation program. Likewise, direct affiliation with the two other mentioned organizations, National School Boards Association and Ed-Red, was not an important factor in the existence of a formal orientation program, but affiliation with other school board organizations was examined further in a different context, that being the different resources utilized in the orientation of new board members and presented later in this analysis.

In summary, district demographics, type of school district, size of school district, and wealth of school district were not considered to be important factors relative to the existence of formal orientation programs for new board members. The data suggested that districts which were larger (those above the median enrollment) tended to utilize a formal orientation program for new school board members more often than smaller districts. However, a further examination of the type and size of school districts will be utilized in a later section of this chapter.

Importance of Orientation - The importance of orientation for new

board members was examined within the framework of the previously mentioned boardmanship responsibilities suggested by the literature. This factor was examined to determine, if any relationship existed between what new board members considered important responsibilities for which orientation should be provided and what superintendents considered important responsibilities for which new board members should be provided orientation. The comparison of the ranking of importance of orientation by these two respondent groups was attempted to note the commonalities and differences and provide information for superintendents to consider in planning orientation program topics for new board members.

The data in Table 21 suggest that both superintendents and new board members considered all responsibilities listed as important for providing orientation, but the mean rankings of importance differed considerably. These differences were also confirmed from the interviews conducted. New board members ranked knowledge of school finance, working relationship with the superintendent, evaluation of the superintendent, legal authority, board and program accountability, development of policy, establishing broad program goals, and public relations with community and staff as extremely important boardmanship responsibilities to provide orientation on, while the superintendents ranked all the boardmanship responsibilities except knowledge of curriculum and instructional programs, facility planning, enrollment, and knowledge of personnel practices as extremely important.

The ranking of the importance of orientation for the boardmanship responsibilities on the survey instrument and data gathered from the interviews, revealed a difference between what new board members considered important responsibilities to have knowledge of and what superintendents

TABLE 21

A Comparison of the Mean  $\bar{x}$  Ranking of the Importance of Orientation Toward Boardmanship

Responsibilities by New Board Members to Mean  $\bar{x}$  Ranking of the Importance  
of Orientation Toward Boardmanship Responsibilities by Superintendents

<u>Boardmanship Responsibility</u>	<u>Mean <math>\bar{x}</math> Ranking New Board Members</u>	<u>Mean <math>\bar{x}</math> Ranking Superintendents</u>
Knowledge of school finance including budgeting, levying, and bond issued	3.68	3.26
Working relationship with superintendent	3.54	3.81
Evaluation of superintendent	3.39	3.61
Legal authority, responsibilities, and liabilities	3.33	3.06
Board and program accountability	3.25	3.32
Development of policy	3.22	3.77
Establishing broad program goals	3.21	3.32
Knowledge of curriculum and instructional programs	3.14	2.94
Selection of superintendent	3.14	3.55
Public relations with community and staff	3.11	3.32
School board organization and meeting operations	3.00	3.19
Facility planning related to enrollment and programs	3.00	3.00
Knowledge of personnel practices including staff selection and evaluation	2.89	2.77
Collective bargaining	2.82	3.10
Interpersonal relationship with other board members	2.79	3.10

as previously revealed in this section of this study by the new board members.

Orientation Practices - The resources and methods actually utilized to orient new board members in the participating districts was also examined. This was done to determine if any relationship existed between the type of school district, importance of orientation toward boardmanship responsibilities, and affiliation of a school board with other school board organizations, and the resources and methods reported by the respondents as actually used.

The orientation resources reported by the respondents seemed to vary considerably, but yet were consistent between responding superintendents and new board members from the same district. Therefore, a comparison was undertaken to determine if orientation resources utilized varied by type of school district with a formal orientation program and by type of district with no formal orientation program. Table 22 presents an overview of this information.

In comparing districts by type to resources utilized where a formal orientation program existed, the data could not be used to make any conclusive statement because of the small number of unit and secondary districts participating in the study. The same statement can be said for districts with formal orientation programs, but there appeared to be a trend regarding the difference between districts with a formal orientation program and those districts without formal orientation programs. This trend, districts with a formal orientation program for new board members, used more resources for orientation more frequently, than those school districts without a formal orientation program for new board members. In both groups, as defined

in Table 16, the superintendent, school board president, and the Illinois Association of School Boards' "Board Member Orientation Clinic" were the most frequently utilized resources, while the National School Boards Association resources listed were the least frequently used. As noted before, this trend and commonality regarding orientation resources exists due to the design of orientation programs by board of education policy and the quality of the Illinois Association of School Boards' "Orientation Clinic" as expressed by the respondents. Thus, there is a relationship between the frequency and number of resources utilized and districts with a formal orientation program compared to districts without a formal orientation program.

A further analysis was conducted regarding resources utilized for the orientation of new board members. This analysis compared the length of actual board member experience in terms of length of service and the resources the new board member found to be most helpful during orientation. As previously cited, a new board member, for the purpose of this study, was defined as a duly elected or appointed member who has served less than two full years on a board of education. Further, the literature suggested a new board member becomes totally functional and an effective member of a board six months to two years after election. Therefore, the analysis of comparing length of service to the most helpful resources as identified by the respondents could possibly give insight into which resources should be utilized to orient new board members more effectively. The data, presented in Table 23, revealed that length of service of new board members was not related to the most helpful identified resources utilized for orientation, since no commonalities or differences appeared between groups as



TABLE 22

A Comparison of School Districts Utilization of Orientation Resources  
With a Formal Orientation Program and Without a Formal Orientation  
Program by Type of School District

Resources Reported as Utilized  
by District

Type		School board president	Superintendent	Other staff professionals	Boardmanship handbook	I.A.S.B. new member workshop	I.A.S.B. publication	I.A.S.B. annual convention	I.A.S.B. other workshops	N.S.B.A. convention	N.S.B.A. publications	N.S.B.A. academy programs
Formal Orienta- tion Program	Unit N=(3)	3	3	2	0	3	1	1	1	0	0	0
	Secondary N=(4)	3	4	4	4	2	4	3	3	3	3	1
	Elementary N=(13)	11	13	7	3	11	8	5	9	1	3	1
Frequency in % (N=(20))		85	100	65	35	80	65	45	65	20	30	10
Without Formal Orienta- tion Program	Unit N=(1)	1	1	1	1	1	1	0	0	0	0	0
	Secondary N=(1)	1	1	1	1	0	1	0	0	0	0	0
	Elementary N=(9)	6	8	4	3	8	6	3	6	0	2	0
Frequency in % (N=11)		72	90	54	45	81	72	27	54	0	18	0

presented in Table 23. As reported previously, the resources used most frequently, that is, the school board president, superintendent, and Illinois Association of School Boards' "Board Member Orientation Clinic," were the same as the resources identified as most helpful orientation resources by the new board members responding, regardless of the length of service.

TABLE 23

Length of Service of New Board Member Respondents Compared to  
The Most Helpful Orientation Resources Utilized  
To Orient New Board Members

Most Helpful Resources Identified  
By New Board Members

Number of Respondents	Length of Service in Months	<u>Most Helpful Resources Identified</u>												
		School board president	Superintendent	Other staff professionals	Local district orientation	Boardmanship handbook	I.A.S.B. "New Board Member Workshop"	I.A.S.B. publications	I.A.S.B. annual convention	I.A.S.B. other workshops	N.S.B.A. convention	N.S.B.A. publications	N.S.B.A. academy programs	On-the-job experience
2	1 - 6	2	2	2		1	0	0	1	0	0	0	0	1
15	7 - 12	6	15	8	8	4	13	5	4	5	0	0	0	0
2	13 - 18	2	2	1	0	2	1	0	0	0	0	0	0	0
9	19 - 24	5	7	4	2	3	7	3	0	4	1	1	0	0
<u>Total</u> 28		15	26	15	10	10	21	8	5	9	1	1	0	1

Other factors related to the length of services were revealed during the interview process. Two new board members, as well as three superintendents, reported that members who are appointed between elections had to wait six months to a full year before the availability of the Illinois Association of School Boards "Board Member Orientation Clinic." While it has been recognized that this orientation clinic is one of the most helpful resources, consideration should be given by the Illinois Association of School Boards to sponsor the clinic at least on a broad regional level every six months.

In addition to the resources utilized to orient new board members, the methods used to orient new board members were also examined. The data are previously presented in Chapter IV. The utilization of methods for orientation were dependent upon availability of materials that were readily accessible to the superintendent and other district staff members. The two most common methods used to orient board members were to provide new board members with written materials and to discuss particular subject matter pertaining to boardmanship responsibilities. These two methods were reportedly used 40% to 68% of the time for orienting new board members.

The next most common method reported by the respondents of this study was on-the-job experience. The remainder of the methods utilized were lecturing, written exercises, and role-playing. New board members interviewed found that written materials on a particular subject read before an orientation session, discussion, or lecture took place was the most effective method in assimilating knowledge needed to function effectively on a board of education. Thus, it should be noted that methods for orientation vary from district to district with the three most common

methods experienced by new board members being written materials, discussion, and actual on-the-job experience.

Comparison Between Actual Orientation Practices  
In DuPage County, Illinois, and Orientation  
Practices Suggested by the Literature

Nine orientation programs in DuPage County, Illinois, were examined in detail via the interview process. The respondents of the interview were nine superintendents and nine new board members. For the purpose of this comparison, the orientation programs were examined in components as cited from the literature, since the literature did not identify an exemplary orientation program. The components of orientation programs for new board members implied in the literature were: 1) purpose of orientation programs; 2) personnel responsible for implementing orientation programs; 3) content areas of orientation programs as related to boardmanship responsibilities; 4) mechanics of orientation programs, that is, scheduling, location, physical facilities, and personnel used; 5) board of education policy consideration; and 6) utilization of a state school board association's programs for new board members. ✓

Purposes of Orientation - The literature suggested and implied that orientation was necessary for new board members:

1. To function effectively on a board of education;
2. To have a knowledge of their responsibilities;
3. To have a detailed base of knowledge from which to operate and make decisions on;
4. To shorten the time period from being a new board member to an effectively functioning board member;

5. To prevent manipulation by the professional staff; and
6. To help the board member deal with complex educational issues.

The purposes of orientation for new board members cited by the respondents from the nine orientation programs examined in DuPage County were parallel or identical to the purposes cited by the literature, but, in addition, the respondents stated additional purposes. Those additional purposes stated were: 1) orientation should impress upon the new board members their responsibility of providing educational programs needed by children; and 2) orientation should give direction and stability to new board members so they can experience success as a board member and then be successful with their constituents.

Who Is Responsible for Providing Orientation - The literature suggested the ultimate responsibility for orientation rested with the board of education and further suggested that the superintendent of schools and state school board association were the major providers of orientation to new board members. It was evident from the data gathered from the respondents in DuPage County that the superintendent was the main provider of orientation in conjunction with the Illinois Association of School Boards. It should be noted that only six of the nine districts had a board of education policy on "new board member orientation"; thus the ultimate responsibility in the other three districts rested with the superintendent. Two of the six board of education policies examined, provided by the interviewed respondents, also made it the duty of the school board president and administrative staff to provide orientation to new board members besides the superintendent.

Content Areas for Orientation - The literature suggested a plethora

of subject matter topics for which new board members should be provided orientation. Commonly cited subject matter topics for orientation were based on a board member's responsibilities as previously described in this chapter. The eight of the nine orientation programs examined presented and addressed the subject matter stated in the literature. The one orientation program that did not address all the subject matter mentioned in the literature only addressed the topics of district operation, financial matters, negotiations, and personnel practices, in addition to the topics presented by the Illinois Association of School Boards orientation clinic. The reason stated for the limited subject matter was the orientation program had only been in existence for two years and had been used to orient only two new members.

A trend revealed by the data gathered from the interview was that orientation programs in existence for a longer period of time and defined by board policy tended to cover more subject areas pertinent to boardmanship responsibilities identified by the literature. The orientation programs in existence and examined in DuPage County have similar subject matter topics based on a board member's responsibilities when compared to what the literature suggests.

Mechanics of Orientation - The mechanics of orientation programs, that is, scheduling, location, physical facilities utilized, and personnel utilized, were suggested in the literature in a variety of ways. Again, because of the variety of mechanics cited no exemplary orientation program mechanics could be found to compare actual orientation program mechanics, thus making any comparison a difficult factor to analyze. Certain mechanics, though, existed in the orientation programs examined that were common to all

the programs, and possible pitfalls were revealed when comparing orientation programs in DuPage County.

The location of orientation sessions and, thus, the physical facilities of the programs examined were limited to the district administrative offices and touring the school buildings. The location and physical facilities were determined at the convenience of the superintendent and as the most plausible place to conduct orientation, in terms of cost and information readily available in the event the prepared materials were not sufficient to answer questions of the new board member being oriented.

The personnel utilized for orientation in the programs examined was dependent on the size of the central office and defined by board policy in some instances. The personnel utilized for orientation in DuPage County were: the superintendent, assistant superintendent, and business managers (in larger school districts), the school board president, and experienced school board members. Of note, in the programs examined, was the lack of using consultants with expertise in a certain subject area. This lack of using expertise at the local level can be contributed to the utilization of the Illinois Association of School Boards orientation program as being part of planned orientation of the district examined, since this association employs consultants or presentors with expertise in certain subject matter areas for their orientation clinic. The superintendents interviewed also stated in this regard, that new board members tend to express interest in the unique characteristics or problems of the district, and, therefore, it was necessary to utilize district personnel who have the knowledge and expertise to address this need.

The scheduling of local orientation sessions was based on the

factor of providing information to new board members or potential board members as soon as possible before the new board members or potential members experienced their first board meeting. This factor seemed to be a serious pitfall because three of the nine new board members did not take full advantage of attending the local orientation sessions or the Illinois Association of School Boards program because of other personal commitments or personal job-related factors conflicted with the dates and time of the orientation sessions. The analysis of comparing the literature to programs in existence revealed orientation sessions could be improved to mesh with personal schedules of new or potential board members in order to ensure maximum participation, or orientation sessions could be held on a regularly scheduled basis for an extended period of time during the year in order for new members to avoid the problems of conflicting personal schedules as suggested in the literature.

Policy Considerations - The literature clearly stated boards of education should have a policy on orientation of new board members. Specifically suggested in the literature was a board policy on orientation that included statements as to the orientation of candidates and new board members, specific materials pertinent to the duties of a board member, when orientation should take place, and purposes of orientation.

An analysis of school districts examined in DuPage County in this study revealed only five out of nine school districts examined had a board of education policy on orientation. The five districts examined had policies on orientation, but all the policies were written and adopted within the last five years. The policies were general in nature but alluded



to the components of orientation, who was responsible, an overview of materials provided, and when orientation should take place. Thus, a trend exists in the sample population examined that is, the development of policy on the orientation of new school board members is a recent happening to ensure that new board members receive some training and knowledge about their responsibilities and duties. It should be noted that the remaining four districts examined lacked a policy on the orientation of new board members but had formal orientation programs. These orientation programs were described or made part of other management vehicles, such as a specific job responsibility of the superintendent and included on the superintendent's evaluation instrument as a criterion of performance.

Utilization of State Association Orientation Programs - The literature revealed and suggested orientation programs be developed and implemented on a state level through the state school board association and further described the orientation via two programs in existence. The literature also recommended the existence of state school board association orientation programs in addition to local orientation programs for new board members.

The data gathered from the nine orientation programs examined for the purposes of this study showed the Illinois Association of School Boards' "Board Member Orientation Clinic" to be an integral recommended component of orientation for new board members. The interview data revealed a lack of coordination between the local orientation programs and the state program in terms of scheduling and subject matter topics. Both the superintendent respondents and new board member respondents considered the Illinois Association of School Boards program an excellent cursory program for

orientation in important and basic boardmanship responsibilities and further suggested this program be mandating for all candidates to a board of education to give the candidates a glimpse of the importance of the role and responsibilities of a board of education member.

In summary, the comparison of actual orientation practices in DuPage County, Illinois, and orientation practices in the literature showed some similarities, differences, pitfalls, and trends. Similar components between actual practices and the literature existed among the components of personnel responsible for implementing orientation and subject matter topics related to boardmanship responsibilities. Differences were noted in the orientation program components of mechanics and policy considerations. Pitfalls were revealed in the orientation program components of mechanics, specifically, scheduling of orientation sessions and coordination of the state association program with local orientation sessions in terms of subject matter and time. Also, a current trend was revealed that is, the development of board policy on new board member orientation was a recent happening in DuPage County, Illinois.

## CHAPTER VI

### CONCLUSIONS, SUMMARY AND RECOMMENDATIONS

This study has attempted to analyze orientation programs utilized by school districts to orient new board of education members. Further, other purposes were to identify from the literature the most accepted responsibilities of boards of education and determine what consistent methods were used to orient new board members for these responsibilities; to identify and analyze actual practices to orient new board members toward the most accepted responsibilities of boards of education within the framework of nine commonly accepted administrative functions; and to analyze the relationship between actual orientation practices and what the literature suggested about orientation practices.

### CONCLUSIONS

The data presented and analyzed in this study were received as a result of a survey conducted among all public school district superintendents and new board of education members in DuPage County, Illinois. Further, additional information and insights were obtained as a result of interviews conducted with nine superintendents and nine new board of education members. In addition to the interviews, school superintendents provided copies of policies, agendas, and letters pertaining to the orientation program of new board members. The literature was also reviewed to determine the most commonly accepted boardmanship responsibilities to analyze in relation to orientation.

The data gathered were reviewed, analyzed, and compared to answer four questions posed by this study. These questions were: 1) What responsibilities should new board members be trained for?; 2) What opportunities and resources were available for new board members during the first crucial months or years for orientation?; 3) Who was responsible for the present orientation of new board members?; 4) How can existing orientation programs be improved to relate to the responsibilities new board members must undertake? Further, orientation programs in DuPage County, Illinois, were compared to nine administrative functions developed by Stephen J. Knezevich. All of the above provided the basis for the following conclusions.

Conclusion 1 - The boardmanship responsibilities as identified from the literature are considered important responsibilities by superintendents and new board members for which to provide orientation and are used in a majority of school districts as orientation topics to orient new board members for their duties as board members.

The most frequently cited boardmanship responsibilities for which orientation was provided in DuPage County orientation programs were: policy development, financial matters, working relationship with the superintendent, evaluation of the superintendent, establishing broad program goals, community and staff relations, knowledge of instructional programs, legal responsibilities and authority, school board organization and meeting operations, facility planning, interpersonal relationships, personnel practices, and collective bargaining (negotiations).

The comparative analysis of the boardmanship responsibilities cited in the literature by frequency and the priorities of the boardmanship responsibilities determined by the mean ranking of the responsibilities by superintendents and new board members showed differences among the litera-

ture, superintendents, and new board members. The differences in the mean rankings were for the following boardmanship responsibilities:

1. School board operations and meeting operations
2. Knowledge of instructional programs
3. Personnel practices
4. Selection of a superintendent
5. Establishment of broad program goals
6. Accountability
7. Financial matters

The importance of these boardmanship responsibilities was also reported by all the study respondents as either "very important" or "important" responsibilities to utilize as topics for orientation. In fact, all but one district of the nine districts with formal orientation programs examined utilized all the boardmanship responsibilities as orientation program subject matter.

Conclusion 2 - Formal orientation programs for new school board members are not directly related to the type, size, and wealth of a school district.

The relationship between the existence of a formal orientation program for new school board members in DuPage County, Illinois, and the type of school district: that is, unit, secondary, elementary; the size of the school district as determined by student enrollment; and wealth of a school district as determined by 1979 assessed valuation per pupil enrollment were not important factors. While the data indicate more formal orientation programs existed in school districts with enrollments above the mean enrollment for DuPage County school districts, the number of participating districts in the study prohibits any absolute conclusions regarding the size of a school district and its relationship to the exis-

tence or non-existence of a formal orientation program. Further, the data indicated formal orientation programs were more likely to exist in school districts where more than one central office administrator was employed, but again a more thorough investigation regarding the relationship between the size of a school district and the existence of a formal orientation program for new board members should be undertaken before any absolute conclusions could be made.

Conclusion 3 - Fewer than half of the school districts in DuPage County, Illinois, provide orientation for new school board members through local district programs and/or the Illinois Association of School Boards.

While twenty-two school districts reported that orientation is provided to new school board members, only thirteen reported formal orientation programs with a majority of the formal programs utilizing a local district program and the Illinois Association of School Boards "Board Member Orientation Clinic." It was also noted that formal orientation programs were a recent development in the last decade with most of the formal programs being developed within the last five years. Further, it was clear from the comments of the respondents that no attempts have been made to coordinate local district orientation programs with the Illinois Association of School Boards program in terms of time or subject matter.

Conclusion 4 - The resources utilized for the orientation of new school board members in DuPage County school districts varied among school districts.

The resources utilized by a majority of school districts in DuPage County, Illinois were found to be common among those districts with formal orientation programs. These formal programs utilized primarily, the superintendent, who was found to be a resource in all of the nine programs examined. The next used resources in order of frequency were the school

board president, Illinois Association of School Boards, "orientation clinic," then other professional staff members, and Illinois Association of School Board publications. Further, it was clear that thirty percent or fewer of the school districts surveyed utilized any resources from the National School Boards Association. As discovered from the interviews the only resource new board members could identify from the National School Boards Association was the film, "On Board," utilized as part of the Illinois Association of School Boards "Board Member Orientation Clinic."

Conclusion 5 - The length of service of a new board member on a board of education was not an important factor in determining the most helpful resources utilized for orientation.

The length of service of a new board member was not an important factor in determining which resources would be most helpful to utilize for orientation, since the resources identified by the new board members with varying length of service from one month to two years were the same resources as identified as actually used for orientation sessions attended by the new members. All new board members placed a high value on the superintendent for satisfying the in-depth orientation needs toward boardmanship responsibilities.

Conclusion 6 - All new board members identified the superintendent of schools as the planner, implementor, and responsible for new board member orientation.

Consistent with the above conclusion was the fact that the board of education policy concerning new board member orientation examined for this study named the superintendent as having the responsibility to provide orientation. Fewer than half the policies examined named other resources such as the school board president, other board members, and other district administrators. Superintendents utilized as a matter of

practice in the absence of policy, other resource personnel. Notably lacking in all the local orientation programs was the use of an outside consultant or consultants hired by a board of education by retainer to provide expertise in a certain area.

Conclusion 7 - The methods used to orient new school board members were common to a majority of DuPage County, Illinois, school districts.

For the most part the methods identified from the literature utilized to orient new board members were common to a majority of school districts. These methods in order of reported frequency were: written materials, discussion on a particular topic, on-the-job experience, lectures, and role-playing. Another method utilized, but infrequently mentioned in the literature, was slide presentations. The only identified boardmanship responsibility not fitting the pattern above was "selection of the superintendent." A reported method used frequently for the "selection of the superintendent" was on-the-job experience, implying many districts provide no initial orientation to new board members for this responsibility.

Conclusion 8 - Orientation programs for new board members utilized in DuPage County, Illinois, were based at least minimally upon administrative functions.

By examining nine orientation programs provided to new board members in DuPage County, Illinois, and comparing those programs by components to the administrative functions proposed by Stephen J. Knezevich, it was determined that at least minimally, the orientation programs utilized in DuPage County, Illinois, were based upon administrative functions. Each of the administrative functions was cited with varying frequency in the DuPage County programs. The nine administrative functions examined were only identified in three orientation programs of the districts studied.



The administrative functions of communicating and resourcing were the most frequently cited functions in the DuPage County orientation programs, and the respondents saw these two as the most important responsibilities of the superintendent. Both functions were rated in each of the programs examined and were identified by all eighteen respondents interviewed. The importance of these functions was further emphasized, in that, other administrative functions were at least to some degree dependent upon effective communication and providing both personnel and financial resources for orientation programs. Thus, the superintendent and board of education must ensure effective communication and financial resources in order to carry out orientation programs and other administrative functions.

Staffing and organizing were the second most frequently cited functions, as they were identified sixteen times within the DuPage County orientation programs. Staffing included providing and committing district personnel and board members including the school board president to provide the expertise needed for certain topics considered during orientation sessions. Organizing included developing the orientation into manageable components and making arrangements for new board members to attend state association clinics and workshops.

The third most frequently cited administrative function was executing, identified fourteen times. This function was cited because of the problems experienced by new board members attending orientation sessions because of personal time constraints of the new board member, full implementation of orientation programs for one new board member, and the priorities placed on the orientation process by boards of education and superintendents. This function was also dependent on the other administrative function of anticipating and coordinating. Both boards of education and

the superintendents need to maximize the opportunities to orient new board members, if they expect to have an effective operating school board.

Anticipating (planning) was the fourth most frequently cited administrative function. It was mentioned twelve times. This function involved sending notification of orientation sessions to candidates for election to the board of education, obtaining a needs assessment of what the new member needs to know, and evaluating present orientation practices to forecast and develop new orientation programs to better fit the needs of new board members.

The following administrative functions were also noted but with limited Frequency. Controlling, coordinating, and programing were cited five times or less. Despite the fact that many of these functions were cited with limited frequency, it was noted that in many cases the functions were interrelated with the functions of communicating, organizing, and anticipating. For example, coordinating was mentioned four times in DuPage County orientation programs. Because coordinating referred to unifying various components of a program into objective functions, it may be that this function was fulfilled by the superintendent in the planning function.

The orientation programs for new board members were to varying degrees, based upon commonly identified administrative functions, but orientation programs were not developed utilizing commonly identified administrative functions.

Conclusion 9 - Orientation programs for new board members which had been identified in the literature were similar to the orientation programs utilized in DuPage County, Illinois.

The comparison made between DuPage County, Illinois, new board member orientation programs and the orientation programs described in the literature, revealed similarities in the components of orientation. The

components that were similar were: purpose of orientation; who was responsible for implementing orientation programs; mechanics of orientation; board of education policy; and utilization of a state school board association's orientation programs for new board members. Thus, the orientation programs in existence in DuPage County, Illinois, compared favorably to the programs in the literature. This comparison also revealed a trend; that is, orientation programs in existence for a longer period of time and defined by board policy tended more often to orient new board members toward their boardmanship responsibilities as identified from the literature. Further, this comparison tended to highlight what should be done by superintendents, boards of education, and the Illinois Association of School Boards to improve present orientation programs.

#### SUMMARY

This study has attempted to analyze orientation programs utilized by school districts to orient new board of education members. As part of that analysis, an effort was made to identify accepted boardmanship responsibilities from the literature and determine what consistent methods were used to orient new board members for these responsibilities, to identify actual orientation practices in existence, and to determine their relationship to commonly accepted administrative functions. In addition, orientation programs described in the literature were compared to orientation programs utilized in DuPage County, Illinois.

To complete this study a comprehensive examination of the literature was conducted. That examination included a review of boardmanship responsibilities determined by the authorities, a review of the literature pertaining to the orientation of new school board members, and a review

of the literature pertaining to administrative functions. As a result of the review of the literature, fifteen boardmanship responsibilities were identified and used for determining the importance of these responsibilities in the orientation process of new board members. Also, nine of sixteen administrative functions developed by Stephen J. Knezevich were selected as the function to determine whether existing orientation programs were based or developed on administrative functions. Because the literature described a variety of orientation programs, the major components of those programs were utilized for the purpose of comparing the orientation programs described in the literature to currently existing orientation programs for new school board members in DuPage County, Illinois.

A survey was developed, submitted to a jury of experts, field-tested, and disseminated to forty-two superintendents and new board members as defined in this study in DuPage County, Illinois. In addition, interviews were held with nine superintendents and nine new board members in an effort to gain further insights and obtain further data and explanations pertaining to the orientation of new board members. The survey and interviews were the primary source of data which was utilized in this study.

As a result of a thorough analysis of orientation programs for new school board members and boardmanship responsibilities, it was determined that boardmanship responsibilities as identified from the literature were considered important by superintendents and new board members for which to provide orientation and were used in a majority of school districts as orientation topics to orient new board members for their duties as a board member.

The data results also suggest the type, size, and wealth of a school district were not considered to be important factors to the exis-

tence of formal orientation programs for new school board members. Also found from the data analysis was a minority of school districts in DuPage County, Illinois, provide orientation for new school board members through local district programs and/or the Illinois Association of School Boards. A trend was noted, that being, local orientation programs for new board members was a recent development for the school districts examined.

Resources utilized for the orientation of new school board members in DuPage County, Illinois, school districts varied, although common to a majority of orientation programs were the resources of local district personnel, school board president, Illinois Association of School Boards "Board Member Orientation Clinic," Illinois Association of School Boards publications and workshops. Further, the length of service on a board of education was not important in determining what resources should be utilized for orientation programs. All new board members identified the superintendent of schools as the planner, implementor, and responsible for new board member orientation rather than the board of education or school board association. In addition, fourteen of the fifteen commonly identified boardmanship responsibilities revealed in the literature were topics used to orient new board members with a majority of school districts employing the same common methods.

It was also determined from the analysis that, at least to some degree, orientation programs in DuPage County, Illinois, were based upon nine commonly accepted administrative functions. The administrative functions of communicating and resourcing were most frequently cited functions in the DuPage County orientation programs. Other administrative functions which were frequently noted in DuPage County orientation programs were (in the order of most frequently cited) staffing, organizing, executing,

tence of formal orientation programs for new school board members. Also found from the data analysis was a majority of school districts in DuPage County, Illinois provide orientation for new school board members through local district programs and/or the Illinois Association of School Boards. A trend was noted, that being, local orientation programs for new board members was a recent development for the school districts examined.

Resources utilized for the orientation of new school board members in DuPage County, Illinois school districts varied, although common to a majority of orientation programs were the resources of local district personnel, school board president, Illinois Association of School Boards "Board Member Orientation Clinic," Illinois Association of School Boards publications and workshops. Further, the length of service on a board of education was not important in determining what resources should be utilized for orientation programs. All new board members identified the superintendent of schools as the planner, implementor, and responsible for new board member orientation rather than the board of education or school board association. In addition, fourteen of the fifteen commonly identified boardmanship responsibilities revealed in the literature were topics used to orient new board members with a majority of school districts employing the same common methods.

It was also determined from the analysis that, at least to some degree, orientation programs in DuPage County, Illinois, were based upon nine commonly accepted administrative functions. The administrative functions of communicating and resourcing were most frequently cited functions in the DuPage County orientation programs. Other administrative functions which were frequently noted in DuPage County orientation programs were (in the order of most frequently cited) staffing, organizing, executing,

and anticipating (planning). Other functions noted but with limited frequency were controlling, coordinating and programming in the orientation programs that were reviewed.

Finally, it was determined that the orientation programs utilized to orient new board members in DuPage County, Illinois, were similar to what the literature revealed pertaining to orientation programs for new board members.

### RECOMMENDATIONS

These recommendations considered an important question posed by this study. How can existing orientation programs be improved to relate to the responsibilities new board members must undertake? Therefore, from the data gathered, analyzed, information gleaned from the literature, and from the mechanics and techniques gleaned from the DuPage County, Illinois orientation programs, the following recommendations are made for the improvement of orientation programs.

It is recommended that boards of education and superintendents consider the following as they develop or revise formal orientation programs for new board members.

1. Recognize that orientation of new board members is essential and a necessary priority to have effective boards of education and therefore, effectively operating schools.

It is essential that all boards of education and superintendents make an effort to develop quality orientation programs for the initial training of board members. Superintendents must assume and exert leadership in this endeavor, especially in the school

districts which do not have orientation programs.

2. Coordinate district orientation programs and the Illinois Association of School Boards "Board Member Orientation Clinic". This effort should be made since most new board members highly value the orientation and cursory training given by the Illinois Association of School Boards "Orientation Clinic" in the areas directly related to boardmanship responsibilities. Utilization of the Illinois Association of School Boards program as the first orientation session followed by further sessions at the local level with coordination of subject matter would vastly improve the present formal orientation programs now in existence.

3. Make orientation mandatory for candidates to be elected to a board of education.

This recommendation will eliminate to a great extent the problem of new members not being able to participate in orientation programs because of personal commitments or job-related commitments. A candidate would, for election to a board of education, not be eligible for placement on the election ballot until a "certification of completion" of basic orientation to the duties and responsibilities of a board member was undertaken.

4. Change the time of the Illinois Association of School Boards "Board Member Orientation Clinic" to occur prior to bi-yearly board of education elections and further consider offering this program on a six month basis, so that appointed board members have the advantage of this orientation program. Schedule changes can accommodate the previous recommendation and provide appointed board members a complete orientation process.



5. Establish a needs assessment instrument to gather the orientation needs of prospective or new board members.

A needs assessment will provide the necessary information for the superintendent to plan and structure an orientation more meaningful to new board members. This needs assessment can then be utilized three to six months after initial orientation to discover what further knowledge a new board member needs for the superintendent to plan a strategy for continuing the training of the board member.

6. Provide debriefing sessions after each initial orientation session and follow-up orientation sessions for the first two months of actual on-the-job experience.

The debriefing sessions and follow-up sessions seem to be an essential component to monitor the orientation process of new board members by providing needed and necessary information in a timely fashion. Special attention to the needs of the new member will impart the feeling of board member importance and contribute to the success of the board working toward its goals and purposes.

7. Provide reading materials to new board members before orientation sessions take place on the specific topics covered during the orientation session.

The presentation of written materials before an actual orientation will allow the new board member time to assimilate some of the vast amounts of reading materials given to new board members and provide minimal introduction to a topic before actual orientation begins. The written materials should be organized and coordinated by topic based on a boardmanship responsibility and within the

order of the actual orientation session topic.

8. Share the responsibility for planning and implementing orientation of new board members among the superintendent, experienced board members, and school board president.

A collaboration among the superintendent, experienced board members, and school board president in planning and implementing orientation would provide a review of duties and responsibilities for experienced board members and also provide a balanced viewpoint about a particular school district's unique characteristics.

#### RECOMMENDATIONS FOR FURTHER STUDY

Conduct a similar study pertaining to the orientation of new school board members comparing and analyzing school districts with orientation programs and without orientation programs.

A study comparing school districts with orientation programs and without orientation programs would be of particular interest to determine the effectiveness of orientation as it relates to the performance of a board of education. A study focusing on the effectiveness of board performance due to the orientation of new members would be beneficial to both superintendents and boards of education, particularly since the trend to orient new board members will probably increase as the operation of school districts becomes more complex.

Develop and study an orientation program for new school board members based on commonly accepted administrative functions.

An orientation program could be constructed which is based on administrative functions for the purposes of orienting new board members. This program could be implemented among the variety of types and sizes of school districts without formal orientation programs in an effort to obtain

data and its usefulness, effectiveness, and ease of administration.

Conduct a study pertaining to the training of board members after the initial period of orientation is considered complete.

While this study focused on the orientation of new board members, it was clear that board members with more than one and one half years of experience, still had training needs and knowledge needs in order to make effective decisions as a member of the board. An investigation on the continued training of board members warrants study. Accordingly, a study which would explore the continued training needs of board members would have merit.

Conduct a study pertaining to the use of input from new board members in regard to the development of orientation programs.

This study noted that on a limited basis, some superintendents and boards of education utilized input from new board members in structuring and planning orientation sessions, but a majority of programs are planned and structured based on the experience of the superintendent in regard to orienting new board members. It would have merit to investigate the use of input from new board members and to examine the advantages and disadvantages of this process in attempting to improve orientation programs based on needs of the new board members.

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APPENDIX A

PUBLIC SCHOOL DISTRICTS, DU PAGE COUNTY, ILLINOIS  
1980-81 SCHOOL YEAR

	<u>DISTRICT NUMBER</u>	<u>NAME OF DISTRICT</u>	<u>ENROLLMENT</u>
<u>Elementary Districts</u>	2	Bensenville	2,092
	4	Addison	3,920
	7	Wood Dale	1,065
	10	Itasca	927
	11	Medinah	702
	12	Roselle	597
	13	Bloomingtondale	1,395
	15	Marquardt	2,625
	16	Queen Bee	2,532
	20	Keeneyville	1,472
	25	Benjamin	497
	27	McAuley	29
	33	West Chicago	2,350
	34	Winfield	407
	41	Glen Ellyn	2,853
	44	Lombard	3,032
	45	Villa Park	3,978
	48	Salt Creek	683
	53	Butler	528
	58	Downers Grove	4,383
	60	Maercker	926
	61	Darien	2,448
	62	Gower	723
	63	Cass	785
	65	Bromberek	172
	66	Center Cass	890
	68	Woodridge	3,542
	69	Puffer-Hefty	402
	89	Glen Ellyn Com. Cons.	2,284
	93	Carol Stream Com. Cons.	1,925
	180	Palisades Com. Cons.	497
	181	Hinsdale Com. Cons.	2,436
<u>High School Districts</u>			
	86	Hinsdale Twp.	4,308
	87	Glenbard Twp.	7,917
	88	Community	5,171
	94	West Chicago	1,521
	99	Downers Grove	5,324
	100	Fenton	1,625
	108	Lake Park	2,616
<u>Unit Districts</u>			
	200	Wheaton	10,310
	201	Westmont	1,918
	202	Lisle	1,932
	203	Naperville	12,438
	204	Indian Prairie	2,287
	205	Elmhurst	7,977

APPENDIX B

JURY OF EXPERTS

Dr. Melvin P. Heller  
Professor and Chairman of  
the Department of Educational  
Administration and Supervision  
Loyola University  
Chicago, Illinois 60611

Dr. William J. Attea  
Superintendent of Schools  
Glenview C. C. School  
District 34  
Glenview, Illinois 60025

Dr. Philip Carlin  
Associate Professor of  
Educational Administration  
and Supervision  
Loyola University  
Chicago, Illinois 60611

Dr. David F. Byrne  
Superintendent of Schools  
Leyden Comm. High School  
District 212  
Franklin Park, Illinois 60131

Dr. Max Bailey  
Associate Professor of  
Educational Administration  
and Supervision  
Loyola University  
Chicago, Illinois 60611

Dr. Jack D. Felger  
Superintendent of Schools  
Prairie-Hills Elementary  
School District 144  
Hazelcrest, Illinois 60429



**Palisades Community Consolidated School District Number 180***Serving portions of Burr Ridge, Argonne and unincorporated DuPage County*

PALISADES DISTRICT  
 ADMINISTRATIVE OFFICE  
 451 91st Street  
 Burr Ridge, Illinois 60521  
 (2) 325-5454



DREW J. STARSIAK  
 Superintendent of Schools

February 4, 1981

Dear

Your recognition as an expert and leader in the field of school administration is widely known. For this reason I would greatly appreciate your serving on a jury of experts to evaluate an instrument I have devised for collecting data as part of my dissertation concerning the orientation of new board of education members toward the most accepted responsibilities of boards of education. The jury of experts in which you have been included consists of six leaders in the field of school administration.

Part of the research design I am following in my study calls for new board members in DuPage County, Illinois (those members with less than two years of service on a board of education) to check what methods are used during the orientation process, what resources are actually used for orientation, to rank the responsibilities most commonly found in the literature for board members, and to rank the importance of orientation for these responsibilities. The research design also calls for DuPage County, Illinois superintendents to do the same. The identical survey will be used for both new board members and superintendents.

I am requesting you to comment on the enclosed survey. I am seeking your advice and counsel as to:

1. Content: In your opinion do the survey questions and ranking sections solicit information that will be useful for fulfilling my dissertation research design? If not, how can the questions or rankings be changed or modified.
2. Construction: In your opinion is the format of the survey and individual questions easy to handle and easily understood? Do any of the listed functional responsibilities lend themselves to ambiguities? Would you add or delete any of the functional responsibilities?

Please write your comments directly on the survey and feel free to offer comments or suggestions as you feel appropriate and return to me in the enclosed envelope. Thank you very much for your time and expertise.

Sincerely yours,

Drew J. Starsiak  
 Superintendent

DJS:dd  
 Enc: Survey

LETTER TO MEMBERS OF BOARD OF EDUCATION OF PALISADES COMMUNITY CONSOLIDATED  
SCHOOL DISTRICT 180 REGARDING FIELD TESTING THE SURVEY INSTRUMENT

# Palisades Community Consolidated School District Number 180

Serving portions of Burr Ridge, Argonne and unincorporated DuPage County

PALISADES DISTRICT  
ADMINISTRATIVE OFFICE  
120451 91st Street  
Burr Ridge, Illinois 60521  
(2) 325-5454



DREW J. STARSIK  
Superintendent of Schools

March 2, 1981

Dear Board of Education Member:

This letter is to seek your assistance with my dissertation research which I am conducting as a doctoral student at Loyola University of Chicago. My study will be used to identify implications for superintendents, local school boards, the I.A.S.B., and the N.S.B.A. in terms of orienting new school board members toward their boardmanship responsibilities.

My topic of research is "An Analysis of Orientation for New Board Members in Selected School Districts of DuPage County, Illinois." As part of this analysis, I will attempt to determine what responsibilities new board members are trained for, what methods and resources were available and utilized for orientation of new board members, and to determine the relationship between the orientation process used for new board members and commonly accepted administrative functions.

Your assistance and cooperation are appreciated. Specifically, my request is that you complete the enclosed survey and return it to me in the enclosed self-addressed envelope on or before March 18, 1981.

I assure you that all responses will remain confidential and anonymous for the duration of the study.

Should you wish a copy of the results of this survey, please provide your mailing address on page four of the survey and I will gladly mail you the results once the survey is completed.

Again, thank you for your assistance and cooperation.

Sincerely yours,

Drew J. Starsiak  
Superintendent

DJS:dd  
Enc: Self-addressed envelope  
Survey

APPENDIX E  
SURVEY COMPLETED BY SUPERINTENDENTS AND NEW SCHOOL BOARD MEMBERS

BOARDMANSHIP RESPONSIBILITIES AND ORIENTATION SURVEY FOR

NEW BOARD MEMBERS AND THEIR SUPERINTENDENTS

Purpose: The purpose of this survey is to identify the most accepted responsibilities new board members must deal with and identify whether orientation for the most accepted responsibilities is provided to new board members. Individual responses will be treated confidentially. Please answer all questions on the survey. Thank you for taking the time required to complete the survey.

PART I - BACKGROUND INFORMATION

Directions: Please complete the blank spaces with the appropriate information and check the following items as they apply to you.

A. NAME (optional): \_\_\_\_\_

B. DISTRICT # \_\_\_\_\_

C. TYPE OF SCHOOL DISTRICT:

- Elementary  
 High School  
 Unit

D. PUPIL ENROLLMENT:

- 1 - 500  
 501 - 1000  
 1001 - 3000  
 3001 - 5000  
 More than 5000

E. EQUALIZED ASSESSED VALUATION 1979: \$ \_\_\_\_\_

F. POSITION:  Superintendent  
 New Board Member (less than two full years of service)

G. LENGTH OF SERVICE: \_\_\_\_\_ Years \_\_\_\_\_ Months

H. SEX: \_\_\_\_\_ Female \_\_\_\_\_ Male

I. OCCUPATION: \_\_\_\_\_

J. Your Board of Education holds membership in the following organizations:

- Illinois Association of School Boards  
 National School Boards Association  
 Others (please specify) \_\_\_\_\_

K. The Board of Education has a program for the orientation of new school board members:

- Yes  No

PART II - RESPONSIBILITIES OF BOARDMANSHIP

Directions: From your experience as a new board member/superintendent, please rank order the responsibilities of boardmanship listed below from one (1) through fifteen (15) in the left column. One is the most important; fifteen the least important.

For each responsibility please list the method in the right column actually used for orientation during the first 24 months on the board toward the responsibility by using the letter code in front of the methods listed below. More than one method can be listed.

Actual Methods Used

- |                                     |                                    |
|-------------------------------------|------------------------------------|
| A. Reading Materials                | E. Lecture                         |
| B. Role Playing                     | F. Discussion                      |
| C. Written Exercises                | G. No Orientation Given            |
| D. Experience (on-the-job training) | H. Other Method, explain in margin |

RANK ORDER  
NUMBER

BOARDMANSHIP RESPONSIBILITIES

METHOD(S) USED

_____	1. Development of policy	_____
_____	2. Working relationship with superintendent	_____
_____	3. Public relations with community and staff	_____
_____	4. Knowledge of school finance including budgeting, levying, and bond issues	_____
_____	5. Evaluation of superintendent	_____
_____	6. Knowledge of curriculum and instructional programs	_____
_____	7. Legal authority - responsibilities and liabilities	_____
_____	8. Knowledge of personnel practices including staff selection and evaluation	_____
_____	9. Collective bargaining	_____
_____	10. School board organization and meeting operations	_____
_____	11. Interpersonal relationships with other board members	_____
_____	12. Selection of superintendent	_____
_____	13. Facility planning related to enrollment & programs	_____
_____	14. Establishing broad program goals	_____
_____	15. Board and program accountability	_____

PART III - IMPORTANCE OF ORIENTATION

Directions: From your experience as a new board member/superintendent, how important is orientation for each responsibility listed below. Rate the importance of each item below by checking each item on the scale to the right of the listed responsibility.

RESPONSIBILITIES OF BOARD MEMBERS

	Extreme Importance	Important	Little Importance	No Importance
1. Development of policy				
2. Working relationship with superintendent				
3. Public relations with community and staff				
4. Knowledge of school finance including budgeting, levying, and bond issues				
5. Evaluation of superintendent				
6. Knowledge of curriculum and instructional programs				
7. Legal authority, responsibilities and liabilities				
8. Knowledge of personnel practices including staff selection and evaluation				
9. Collective bargaining				
10. School board organization and meeting operations				
11. Interpersonal relationships with other board members				
12. Selection of superintendent				
13. Facility planning related to enrollment and programs				
14. Establishing broad program goals				
15. Board and program accountability				

PART IV - ORIENTATION RESOURCES

Directions: Please consider all the people, resources and opportunities you have as a new board member or superintendent for orientation of board members to the responsibilities of boardmanship.

In your experience during the first 24 months on the Board of Education, which of the following resources are most helpful? Check up to five in Column A.

Which resources are actually used to orient new board members? Check as many as are applicable in Column B.

COLUMN A

COLUMN B

MOST HELPFUL

RESOURCES

ACTUALLY USED

School Board president

Superintendent

Other staff professionals

Local district orientation sessions

Boardmanship handbook

I.A.S.B. New Board Member Workshop

I.A.S.B. publications

I.A.S.B. annual convention

I.A.S.B. other workshops

N.S.B.A. convention

N.S.B.A. publications

N.S.B.A. academy programs

Others (please specify below)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Please check:

I would like a copy of the survey results.

Address: \_\_\_\_\_

\_\_\_\_\_

## Palisades Community Consolidated School District Number 180

Serving portions of Burr Ridge, Argonne and unincorporated DuPage County

PALISADES DISTRICT  
 ADMINISTRATIVE OFFICE  
 15W451 91st Street  
 Burr Ridge, Illinois 60521  
 (312) 325-5454



DREW J. STARSIK  
 Superintendent of Schools

March 2, 1981

Dear Superintendent:

This letter is to seek your assistance with my dissertation research which I am conducting as a doctoral student at Loyola University of Chicago.

My topic of research is "An Analysis of Orientation for New Board Members in Selected School Districts of DuPage County, Illinois." As part of this analysis I will attempt to determine what responsibilities new board members are trained for, what methods and resources were available and utilized for orientation of new board members, and to determine the relationship between the orientation process used for new board members and commonly accepted administrative functions. The results of the study will be used to identify implications for superintendents, local school boards, the I.A.S.B., and the N.S.B.A. in terms of orienting new school board members toward their boardmanship responsibilities.

Your assistance and cooperation is appreciated. Specifically my request is that you complete the attached survey and return it to me in the enclosed self-addressed envelope on or before March 18, 1981, and distribute the survey to new members of your Board of Education who have less than two years of service on the Board of Education. Should you require more than the three surveys enclosed for your board members, please call me at 325-5454 to obtain additional survey instruments.

Since the research sample is limited to DuPage County new board members and superintendents, your participation is important in order to provide a valid and representative sample. Should you wish a copy of the results of the survey, please indicate the same on page four of the survey and I will gladly mail you the results once compiled.

I recognize that you maintain a busy schedule and appreciate your cooperation and assistance.

Sincerely yours,

Drew J. Starsiak  
 Superintendent

DJS:dd

Enc: Self-addressed envelope  
 Survey

Three sets of material for new board members

EXPLANATORY LETTER ACCOMPANYING SURVEY TO NEW BOARD MEMBERS**Palisades Community Consolidated School District Number 180***Serving portions of Burr Ridge, Argonne and unincorporated DuPage County*

PALISADES DISTRICT  
 ADMINISTRATIVE OFFICE  
 15W451 91st Street  
 Burr Ridge, Illinois 60521  
 (312) 325-5454



DREW J. STARSIK  
 Superintendent of Schools

March 2, 1981

Dear Board of Education Member:

This letter is to seek your assistance with my dissertation research which I am conducting as a doctoral student at Loyola University of Chicago. My study will be used to identify implications for superintendents, local school boards, the I.A.S.B., and the N.S.B.A. in terms of orienting new school board members toward their boardmanship responsibilities.

My topic of research is "An Analysis of Orientation for New Board Members in Selected School Districts of DuPage County, Illinois." As part of this analysis, I will attempt to determine what responsibilities new board members are trained for, what methods and resources were available and utilized for orientation of new board members, and to determine the relationship between the orientation process used for new board members and commonly accepted administrative functions.

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I assure you that all responses will remain confidential and anonymous for the duration of the study.

Should you wish a copy of the results of this survey, please provide your mailing address on page four of the survey and I will gladly mail you the results once the survey is completed.

Again, thank you for your assistance and cooperation.

Sincerely yours,

Drew J. Starsiak  
 Superintendent

DJS:dd  
 Enc: Self-addressed envelope  
 Survey



## APPENDIX H

### INTERVIEW GUIDE

The questions listed below will be utilized to guide the interview with superintendents and new board members from the random sample who indicated in the original survey that their district had an orientation program for new school board members. Each question will be asked in order, and in the same way, in an effort to make the response comparable.

1. What are the orientation needs of new school board members in terms of their responsibilities?
2. What orientation resources are available and most helpful to you?
3. What opportunities are available to new school board members for orientation? Did you take advantage of these opportunities? Where? When?
4. Who has the major responsibility for planning and organizing orientation in your school district? Who has the responsibility to notify new board members about orientation sessions?
5. How did you determine what topics you needed to be informed on for orientation?
6. Does your board of education have any written policies or written materials that describe the orientation process? Can you provide me with a copy?
7. What are the purposes of orienting new school board members?
8. Can you describe the program of orientation for new school board members in terms of the number of meetings attended, time spent on orientation, topics covered, and money spent?
9. If given the opportunity or responsibility to improve the orientation program for new school board members, how would you improve the orientation process? Please explain.

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APPROVAL SHEET

The dissertation submitted by Drew J. Starsiak has been read and approved by the following committee:

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The final copies have been examined by the director of the dissertation and the signature which appears below verifies the fact that any necessary changes have been incorporated and that the dissertation is now given final approval by the Committee with reference to form and content.

The dissertation is, therefore accepted, in partial fulfillment of the requirements for the degree of Doctor of Education.

October 5, 1981  
Date

M.P. Heller  
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