



# Interviews with School Board Chairs – Perspectives on Governance

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## Introduction

The question of what kind of governance should be practiced by school boards has been under consideration for nearly 40 years in jurisdictions in Canada and around the world. Common areas of concern center on what it means to be an effective governor and an effective governance body. At the root of the concerns and questions is the fundamental question of what is meant by “governance”. In other words, what are the assumptions, values, and practices which are best aligned with the purposes of public education?

The province of Alberta through the Alberta Education – the government ministry involved – began a thorough review of the *School Act* (RSA, 1980) that last had major revisions done 1988. The 30-year old legislation was identified as unable to produce the kinds of educational outcomes being suggested from extensive public consultations conducted by the Minister of Education, Dave Hancock. More than 1,600 students, 7,000 parents with children in special education settings (e.g., gifted learners, persons with learning disabilities), and a further 3,400 stakeholders were involved between 2008 and 2009 (Inspiring Education, 2010, pp. 14-16). The collective public response “advocated for an informed transformation of Alberta’s education system, one that challenges commonly held beliefs and leads to new structures and approaches” (p. 16). With a vision set to how an educated Albertan would describe themselves in 2030, three themes pertaining to educational outcomes emerged from the consultations: engaged thinker, ethical citizen, and entrepreneurial spirit.

These large-scale public consultations produced a picture of education that would require substantial changes to the existing policy environment. The ministry set the stage for the changes when it presented what the policy transition would entail. There would be less focus on the school, less centered on the system, less focused on the content and less technology to support teaching. There would be more focus on education, more centered on the learner, more building competencies, more use of technology to support the creation and sharing of knowledge (p. 22). The principles that would shape the policy shifts are:

- Learner centered
- Shared responsibility and accountability
- Engaged communities
- Inclusive, equitable access
- Responsive, flexible approach
- Sustainable and efficient use of resources
- Innovation to promote and strive for excellence (pp. 31-32).

While the public consultation process did not address governance as part of its mandate, the Steering Committee appointed by the Minister to oversee the review, did “reflect on the governance implications of what it heard from Albertans” (p. 33). The Steering Committee identified four shifts to align school board governance with anticipated policy shifts shown in Table 1. With this the Steering Committee went further, expanding on how the practice of governance would need to change moving from predominantly fiduciary and strategic domains

of governance to include generative governance (Chait et al, 2005). Other ideas presented included:

- The importance of having governors “engage the whole community in ownership of the education system” (Inspiring Education, 2010, p. 34).
- Linking a broad range of stakeholders into a governance team, including parents, families, educators, municipalities, cultural groups, professional groups, nonprofit organizations, businesses, employer groups, post-secondary institutions and First Nations, Métis and Inuit communities (p. 35).
- governors to included “appointed, or recruited from the community” (p. 35).
- Coordination of community services with the education system (p. 35).
- A “more public role” for governors aimed at deepening “everyone’s understanding of issues and trends to generate new ideas” (p. 35).

**Table 1. Ministry anticipated shifts in governance by school boards.**

Less	More
Rules-based	Principles-based
Operational focus	Governance teams
Central influence	Local direction
Accountability to bureaucracy	Accountability for learning excellence

For approximately a year these ideas circulated within the education community. As trustees prepared themselves for an election on October 18, 2010, the Alberta School Boards’ Association (ASBA) initiated research to understand where school boards stood on the ideas being presented. This research report is part of the research undertaken by ASBA.

## School Board Governance

The literature on school board governance demonstrates a long standing concern with the shortcomings of how school boards go about governing within their particular jurisdiction. The complexity of the governance both in terms of what it is believed to be and the context in which it is carried out are undoubtedly considerations. Lynn, Heinrich, and Hill (2001) emphasize the spectrum of relationships that constitute the systems for policy choice and action. Gill (2005) defines governance as “the exercise of authority, direction and control of an organization in order to ensure that its purpose is achieved”. When Chait, Ryan and Taylor (2005) produced their now well recognized work, *Governance and Leadership*, they charted a new course for understanding and undertaking governance. They note that when boards ask “What is governing?” (p. 25, emphasis in original) that the responses have tended to “envision governance as the sum of discrete goal-setting and oversight tasks... structured as a series of committees” (p. 25). They suggest that these limited tasks and structures have left little open for boards to consider beyond what could be considered management functions of governors. Chait et al propose that in addition to asking “What is governing?” that boards ask “What is it we’re governing?”. It is this additional question that cracks open governance as a generative

space where engagement with the broader world is important and necessary. It also makes governance itself more ambiguous and perhaps tentative.

With the publication of *Inspiring Education* (2010) and shortly afterwards, *Inspiring Action* (2010) signaled that Alberta Education was adopting the approach to governance that Chait et al suggested. The emphasis on a new kind of governance responsibility and role for school board trustees was viewed as a significant departure from the predominantly fiduciary role school boards and trustees had fulfilled for the previous decades. Understanding the road to this point is important as it sets the context for the comments of board chairs presented later in this report.

The literature calling for governance change within education systems began to grow in the 1970 with the identification of core issues that ring true today. Burgess (1977) for example observed that, ““In education... democratic decision making has been discouraged by three major groups at the core of the system... school administrators, teacher organizations, and school boards” (p. 43). In reviewing the literature to that point in time Burgess concluded that, “The literature on school boards, teacher unions, and educational bureaucracies, however, indicates that free participation is not a right that is accepted by the educational establishment. (p. 51). Calls began for greater citizen involvement and engagement in and with school boards. For example, Stanwich (1975) identified ten areas of positive citizen impact:

1. Identifying goals, priorities and needs
2. Setting budget priorities
3. Selecting and evaluating principals
4. Selecting and evaluating teachers
5. Evaluating curricula
6. Evaluating extracurricular programs
7. Improving community support for schools
8. Investigating student or parent problems or complaints
9. Raising money for schools
10. Helping in schools as volunteers

With apparently little response by education systems to calls for greatly expanding citizen engagement and involvement with school boards, calls for change became stronger. Coombs (1985) finds that, “... existing formal education systems everywhere [are] growing increasingly obsolete and maladjusted in relation to their rapidly changing societies... all these systems require major changes and innovations” (p. 21). Some such as Chubb & Moe 1990 advocated that school boards be eliminated altogether, and that school governance be conducted by individual schools and their patrons. Other research focused on the competency of trustees. Brehony and Deem (1995) observed that trustee knowledge, “may be derived from many sources including school visits, recollections of school days, the media, political party policy, working in industry and commerce, the experience of bringing up children or living in a particular community” (p.80). They concluded that while “knowledge can confer upon citizens the power to act and administer... we have also suggested that lay governors’ knowledge of education may sometimes be insufficient to enable this to occur. As a consequence, many lay

governors appear relatively powerless to reshape teaching and learning, though many are able to make a significant contribution towards the administration of the non-educational aspects of school life" (p. 97). As a result, trustees are found to be "exerting considerable influence over the administrative framework of schooling" (p. 95). Van Alfen and Schmidt (1997) examined rural boards and identified similar concerns, "[rural] boards studied tended to micromanage their districts, generally ignoring the larger leadership function of building consensus and fostering a sense of community" (p. 14). They also found that even when boards were making an effort to govern in a broader sense than the fulfillment of strictly fiduciary responsibilities, school boards are, "quickly crushed by the weight of administrative detail... Attention to the details of school governance is, of course, essential to board function, but when boards focus meetings and discussions almost exclusively upon budget and personnel, everyone else in the community focuses upon these issues as well... Vision blurs, and leadership opportunities are lost" (p. 14). By this point, the trustee role had become administratively focused rather than focused on engaging citizens in the creation of educational opportunity within their district.

A turn in the literature is noted once we enter the 2000s. Research suggests that "community leadership" (Ofsted, 2003, p. 20) is a dimension of school board governance that is valuable and necessary. In the UK, "Community leadership was the most important element of maintaining an effective education service. All of the LEAs [Local Education Authorities] judged as good were characterized by strong and efficient community leadership... The key to creating strong community leadership depends on collective and corporate commitments from all departments" (Ofsted, 2003, p. 20). Ranson et al (2005) found that "... school governance in many respects remains significantly unrepresentative of some of its significant parent constituencies" (p. 357). Electoral structures are found to "take away incentives for board members to act in the interest of education" (Cabico & Harrison, 2009, p. 20). Further that, "Given the current school board structure, elections are probably not the best mechanism for choosing education policy leaders" (p. 20). Continuing to occur are concerns about the administrative focus of school boards. School boards are found to "lack the expertise, familiarity, and electoral mandate to act as intensive hands-on managers; they should be focusing on district-level policy and vision-setting, not intrusive micromanagement of superintendents and educators" (p. 20).

How boards establish interpretive frames that determine how and if they will entertain new information, including that coming from public delegations to the board begins to appear in the literature only recently. Newton and Sackney (2005) that school boards create a "tacit-collective" (p. 449) knowledge structures that determine how information coming to the board from the public will be received. When the board knows or believes that a delegation coming to board holds a different interpretation of facts, activities, or events, then the tacit interpretation scheme of the board is "a powerful determinant of the types of new knowledge that the group would admit" (p. 450). Effectively boards tend to reject information or perspectives that do not fit within the tacit-collective knowledge structure of the board.

While brief, this overview demonstrates that concerns about school board governance have grown of the past 30 years. The areas of concern cluster into the following areas:

1. The definition of “governance”.
2. The engagement and involvement of citizens in the broader education system.
3. The relationship between school boards, educational systems and society.
4. The singular focus of school boards on administrative tasks rather than educational leadership.
5. Ensuring trustees are knowledgeable about the educational system and the role of education in society.
6. Overcoming procedural or knowledge structures that limit public input into school board governance.

Each of these areas is opened up for discussion in the Ministry’s documents – *Inspiring Education* (2010) and *Inspiring Action* (2010). There is through these documents evidence that there is political leadership to create the foundation for changes in governance. This is significant for this research because even where there are indications of school board leadership, we must heed Ofsted’s (2003) warning that, “... strong leadership by officers cannot compensate for poor political leadership...” (p. 20).

## Theory and Method

The intent of the project was to gather the perceptions on governance practices through interviews with sitting school board chairs prior to the October 18, 2010 municipal elections. Using school board contact lists from the Alberta School Boards Association, all school board chairs were contacted to participate in the research. Out of 62 possible school board chairs, 43 were interviewed (69%). Two research questions guided the research:

1. How do Chairs of school boards perceive the governance role of their board up to October 2010?
2. How do Chairs of school boards anticipate the roles and responsibilities of their school board to change with the new legislation?

A qualitative grounded theory approach (Glaser & Strauss, 1967) was used. The use of a grounded theory approach is appropriate for the research into the perceptions of governance held by chairs of school board because of its use of comparative analysis which allows for insights into areas not well addressed in the literature. Theory generation does not require lots of cases. One case could be used to generate conceptual categories and a few more cases used to confirm the indication (p. 30). "(The researcher’s) job is not to provide a perfect description of an area, but to develop a theory that accounts for much of the relevant behavior" (p. 30).

Interviews were conducted between the August 15, 2010 and October 8, 2010. The sample was divided between the two authors on a roughly equal basis (20 and 23 interviews). A semi-structured interview protocol (see Appendix B) was developed and shared with school board chairs prior to the actual interview. Consent was received from participants (see Appendix A) before booking and conducting the interview. The interviews were not recorded however

extensive memoing took place for each interview. The two authors independently reviewed the interview results and used comparative analysis to identify conceptual categories. A common set of conceptual categories was developed for the full sample using “same or similar” categories occurring in each of the sub-samples. Through comparative analysis different groups or subgroups (e.g., urban and rural, ward system or no ward system) were compared and their differences build into theory. The theory was then tested and refined by considering it with other comparison groups in the sample.

With one purpose of the research being to understand how governance by school boards is carried out so that future supports for school board trustees can be put in place, understanding, even at a general level, the behavior that chairs believe represents “governance” is important. Gaining this perception prior to the introduction of the anticipated Education Act arising from Inspiring Education was also important to establish a rough domain of governance practice which:

- Give a sense of the diversity of governance practice across the province
- Provide direction for more detailed research into school board governance
- Lead to the development of appropriate support materials to improve school board governance.

## Theoretical Categories

The following describes the theoretical categories arising from interviews with school board chairs. Taken together, they represent a description of the ways in which governance by school boards is perceived by chairs. These theoretical categories also provide insight to how school boards are orienting themselves to the anticipated changes in governance being presented by the Minister of Education.

## Role Ambiguity

Across the interviews, a common theme among some Board Chairs was an expressed unwillingness to move in the directions being suggested by the Ministry. Despite the considerable effort by the Ministry to produce discussion documents to guide the writing of the proposed new legislation (through documents such as *Inspiring Education* and *Inspiring Action*) this group of dissenting Chairs were not prepared to change their Board’s governance until there was clarity regarding:

- Ministry expectations
- Roles
- Responsibilities
- Limitations on the autonomy of school boards.

One board chair noted that the board’s most important role was “Approving the Three Year Plan including allocations to small schools” and that this would remain unchanged in spite of the Ministry’s emphasis on priorities other than budgeting. Another Chair whose board accepted the new directions proposed and had implemented governance changes provided a

hint at how the focus on management-level activities can come about. This chair noted that, “In term one, the board was very focused, by the superintendent, in the areas of budget, low level strategic policy and crisis management.”

Chairs expressed that either they or their board felt that the language and the direction being set was “ambiguous and contradictory”. Most stated that their support or opposition to the new direction being set by the Ministry was contingent on clearly understanding what was changing and what was staying the same.

Within this theoretical category were a series of subcategories that express particular areas of concern and insight into the clarity impasse.

Quotes:

“Some trustees want to manage the system... the challenge will be to let go”.

“The ward system means that it takes time to internalize that we are it collectively”.

“Trustee role needs to be more inquiry based and focused on the strategic and generative roles”.

“We often recruit high level trustees, then bore them with low-level work”.

1. **Role ambiguity of the board and trustee.** Across the interviews, respondents were unable to label their role(s) as a board or as trustees. While clusters of activity that could be associated with a role were listed without hesitation (e.g., oversight, setting budget, communicating), respondents almost without exception did not or could not generalize a role from these specific activities (e.g., board as manager).
2. **Governance and Management.** Many of the adjectives used in describing the work of the board suggest a management versus a governance paradigm. Phrases such as “develop budgets”, “address busing concerns”, “negotiate contracts” suggest, at best, a fiduciary focus.
3. **Clarity on the role of the chair.** The chair role was more clearly understood as a media contact, spokesperson, meeting manager, coach, leader, peace maker and facilitator. Some described the role of the board chair more specifically as one of running meetings, representing the board publicly and signing legal agreements and cheques.

Another common theme regarding the role of the chair was the recognition of the chair as a leader.

- Ensures each trustee has the opportunity to speak and is respectfully listened to

- Ensures that the mission/vision are at the forefront
- Is familiar with and shares provincial issues and trends
- Shares leadership with trustees
- Models the way
- Facilitator of change

Board chairs were consistent in their belief that this role will gain further importance as leadership in the informed transformation of our education system. They also were of the view that the leadership relationship of the board chair and superintendent would continue to become increasingly important.

Quotes:

“The chair will need to be a facilitator of collaboration...will need to develop these skills and competencies”.

“Chairs need to be able to lead change- be excited, enthusiastic, positive...we can do this”.

“We need a balanced governance model between the board and the superintendent”.

**4. Ambiguity about the role(s) of the public.** Most board chairs used voters, community and parents, somewhat interchangeably when speaking about the need to inform and respond to community needs. Perhaps the fact that 62% of these trustees were acclaimed negated their thoughts of voters as a distinct constituent. The majority of views of the public, especially in multiple ward systems, appear to be received by way of school councils, with trustees believing that their attendance at these meetings is of prime importance. Board chairs also expressed frustration that the public was not truly aware of the role of trustee having no individual power, but only as a corporate board.

Quotes:

“We use school councils as a source of two-way information”.

“The board provides a human side to the organization”.

“We need to get voters to understand that we are part of a corporate board and need to represent the entire division”.

**5. Representation.** A common concern of chairs was that trustees should arrive at the board table prepared to represent and speak to education for the particular jurisdiction as a whole. Board chairs, in several instances, pointed to multiple allegiances of trustees, where they held other positions, such as municipal council or had specific ties to a faith-based, cultural or language community.

Frequently chairs expressed frustration with trustees who ran and were elected or acclaimed on a single issue such as terminating a principle, getting special programs approved, or stopping a school closure. This practice was more evident in boards that were representative of multiple wards versus a single ward. Those chairs working within a multiple ward system are more likely to experience trustees coming to a board with a narrow personal, geographic or voter initiated agenda. There was also concern expressed, in some cases, where the membership of the board was of a non-diverse background, which created some bias.

Quotes:

“Often transportation issues are more important to the individual trustee or community group”/

“We are focused on the Francophone community”.

“We have an obligation to the bishop, regarding faith-based education” .

“We need a good mix of representation; not just retired educators”.

“Trustees generally are ignorant of the complexity of the system... they can’t be hands on”.

“In many cases we had no election; the person was talked into becoming a trustee”.

- 6. Erosion of board powers.** It was common for respondents to believe that behind the scenes powers of boards are being bargained away to the Alberta School Boards Association or to the Alberta Teachers’ Association. Specifically, many expressed concern that the government was bargaining directly with the teacher’s union, thereby further eroding part of the traditional powers of boards. Many chairs perceived that this particular loss of power of school boards was occurring because the provincial government desires a stable labour environment for the next two years. Others indicated that Members of the Legislative Assembly of Alberta (MLAs) were driving the educational change initiative to take place prior to the next provincial election. Along this line of thinking was the related thought that MLAs would gain additional powers prior to the next provincial election while school boards would lose powers. A specific example that several chairs brought forward was the loss of school board’s individual bargaining powers with teachers.

Board chairs also expressed grave concern about the perceived continued loss of power of boards and the suggestions of reports such as *Inspiring Education* and *Inspiring Action* that boards, in their present form, may no longer exist. Board chairs cited the example of the lack of consultation in the government’s sudden “claw-

back” of school authority reserves, in an uneven fashion, as proof of their lack of power and inability to plan for the long term. Other examples cited were the belief that boards had no power regarding capital funding; that the suggested appointment of trustees and the use of language such as “governor” and “governance team” spelled the end of school boards as we know them. Several experienced board chairs cited the removal of local taxation in 1994, as “the beginning of the end”.

Quotes:

“School boards have been marginalized in the process”.

“School boards are a buffer regarding taxation- they have responsibility but no authority”.

“Appointment of trustees is not the answer- we are not in favour”.

“Any company run this way would fail”.

- 7. Autonomy.** Board chairs viewed the suggestion in *Inspiring Education* of increased local autonomy positively, but with a certain degree of skepticism, noting that they have witnessed a trend toward increased centralization and accountability. The increased requirement to report to the Ministry on a variety of programs and the increased use of “enveloped funding” were cited as examples of these trends. Many viewed the possibility of boards achieving “natural person powers” as a key to achieving autonomy. Board chairs were of the opinion that increased local autonomy would allow boards to respond better to their own local community needs, but also realized that this may add a degree of complexity to their decision making roles.

Quotes:

“If you want a group to take a leadership role they have to know that they are truly empowered- that they have the ball”.

“We need to be independent. We are elected to represent the interests of [citizens] and their children. We are elected to make decisions”.

- 8. Relevance of school boards.** *Inspiring Education* used terms such as “governors” and “governance teams” when describing school jurisdiction governance. This report also suggested that increased community input into decision making could be accomplished through the appointment of trustees, particularly from under-represented groups. Several board chairs supported the notion of appointed members, provided that boards were selecting the appointee. They drew attention

to the present practice where school jurisdictions that border First Nations communities, have appointees that serve as trustees on the school board. They also cited the example of the audit committee of the board, which may have community appointees with particular expertise in financial matters, as an example of a governance team. These chairs were of the opinion that the diversity of background would bring different voices to the table and would help to engage those constituents whose voice was not normally heard.

However, many board chairs viewed this language and the potential appointment of trustees by the government as the “thin edge of the wedge” or the first step in following a path toward centralization that they saw happen in governance in the Ministry of Health and Wellness. For some chairs there was a question about the relevance of the school board as an agent in the educational system. Many expressed concern about the potential for “politization” of school board governance through government appointments and wondered if this was not a further attempt by MLAs to exert authority. Many worried that the view of board governance as partnership with government, as described in *Inspiring Education*, was going to be lost. For example, some perceived that government was setting school boards up to be a “buffer” between government and communities. The school board-as-buffer idea was seen to be the way that government would protect itself from negative public reaction to its own “inadequate planning”.

Several board chairs from smaller jurisdictions with declining enrollments expressed concern that their division might be amalgamated with another to gain efficiencies as has been done in the past.

Quotes:

“I think that [appointees] could bring a wider perspective from the community”.

“I think that school boards have seen their day”.

“The lower level at which the decision is made, the better off we will be”.

## **Engaging Disengagement - The Engagement Dilemma**

This awkward title is intended to reflect the way in which school board chairs talked about engaging the public in public education. Nearly every chair interviewed stated that the greatest challenge faced by school boards was how to engage the public in conversations about public education. Many were of the opinion that the community did not want to be involved and they often could not even form a school council at a school, due to lack of interest. They pointed to a culture of the “drop off” society with an increase in single parent families or both parents working and the only educational responsibility they were taking was to get their children to

school. Many board chairs described community engagement in terms of the trustees attending school council meetings and school celebration events. Most were of the opinion that community engagement required a large scale effort. Many board chairs were of the view that they did not have the time, capacity or expertise within their organization to lead such large scale community engagement events. Only few board chairs described community engagement as a strategic or generative mode of governance by the school board.

The majority of chairs defined community engagement as a priority, but were skeptical as to the possibility that they could be successful in increasing public participation. For example, board chairs pointed to limited success with “town hall” meetings in various communities because the participants who attended either over-represented the system itself or were identified as “special interest” groups. From the chairs indicating this concern, nearly all talked about the need for special interest groups to broaden their perspective or to take into consideration the whole school system. The board’s role, they felt, was not to focus on what were seen to be “special interests” but focus on the system as a whole. Board chairs frequently painted the picture of single interest parents or communities taking over the agenda at public meetings or pursuing their special interest so vigorously that the board and/or administration chose to address the concern through legal means. Many had been in a situation of facing a large group during a crisis situation or a school closure meeting and felt that large scale community gatherings frequently deteriorated to members of the public challenging them personally or taking “pot shots” at the board. In several cases, chairs described instances where the local trustee “sided” with the community or special interest groups, in public, or were silent with their support of a board decision.

Quotes:

“It is great to have community involvement, but we struggle to even have community representatives on school councils” .

“Governance and leadership has evolved over the years independent of Inspiring Education and Inspiring Action. All bodies of government are looking for local consultation. The question is how do you engage in and orchestrate meaningful public consultation?”.

“Often single minded parents take over the direction of a meeting because of a single issue”.

“We need to communicate with communities, but 70% do not have children in schools”.

“We need to engage the community so they understand what is coming- but people are busy” .

“We are really responsible to the community except we don’t have any connections except on emotional issues such as school closures”.

“I can’t imagine anything more exciting than working with community to get more input and ideas”.

“People come forward when there’s an issue but not before... the community felt that the focus groups were a waste of time”.

## Cautious Optimism

As board chairs considered the Ministry’s evolving position and major documents (*Inspiring Education* and *Inspiring Action*) there was a general, though not strong, optimism about where education was heading in the province. There were strong cautions about certain policy directions and ideas, including the makeup and governance of school boards. Specific subcategories are:

1. **Already there.** Most chairs felt that their boards were already operating at the high level of governance intended in *Inspiring Education* and *Inspiring Action*. While they could not give specific examples of what “good governance” looked like – though most indicated such things as democratic process and good meeting management as indicative of good governance – chairs were confident that their current practices were at a high level. Invariably they portrayed their system as “advanced” in governance practices placing students at the centre, reducing the number of policies and suggesting that the separation of duties was accomplished by having only one employee; the superintendent. Most spoke of governance, not in terms of practice, but in terms of structure. Suggestions that they were a Carver board, a policy driven board or used the ASBA policy model was often the language used. Responses regarding the number of wards or the appointment of trustees also suggested a structural bias. When probed as to how these structures affected governance practices, they reverted to descriptors of activities that the board participated in. Those who felt that some change would be needed suggested that all that was needed were minor improvements to their current board practices.

Quotes:

“I don’t see that we are going to change a lot

“This is too conceptual- it is at the 75,000 foot level. It is more strategic or directional and not action oriented”.

“I really don’t anticipate too many changes”.

“We are already there... no change as we’re a governance board”.

- 2. Dramatic change.** A minority of chairs expressed their belief that *Inspiring Education* and *Inspiring Action* signaled the need for transformational change. They suggested that present school board governance practices would no longer meet the needs of 21<sup>st</sup> Century learners. They pointed to the skills of problem solving, creative, thinking and conflict resolution that trustees would need to develop as a more autonomous jurisdiction would bring increased complexity. They saw the possibility of creative ways of organizing to engage their publics and increased creativity through collaboration. They indicated that boards should be leaders in this change, rather than waiting for government to develop the blueprint. These chairs spoke with passion and excitement about future possibilities that change would bring for their jurisdiction. Chairs, in this group, appeared to have a very good understanding of the vision described in *Inspiring Education* and many had participated in the community dialogues or online engagement offered by the Ministry, ASBA, or the Public School Board Association of Alberta (PSBAA), for example.

Quotes:

“We need to be there to lead change... be excited, enthusiastic, positive. We can do this!”.

“The role of the board is to encourage risk-taking. If the board does not embrace change, the organization will not change”.

“The board needs a change in thinking to really address this [governance]”.

“Generative governance is how things should be. Over the years many boards eroded to undemocratic disengaged groups”.

- 3. Preservation of core values/beliefs.** Many chairs described board culture in terms of the values and beliefs that were at the core of their jurisdiction and its communities. Some recalled the challenges of change in the early 1990s when some jurisdictions were amalgamated or regionalized and the long lasting effects of attempting to merge two or more cultures. Those making this recollection indicated that such a cultural change was a difficult and on occasion not successful process. Some chairs of jurisdictions that remained unchanged during that period in the 1990s, spoke to the importance of the legacy and responsibility of belonging to a culture that was established close to 100 years ago. Chairs expressed caution should be exercised during times of change to preserve religious, cultural and language rights. Some chairs indicated that chairs would have to be active in ensuring that good works done by their boards would be preserved through the forthcoming period of change. Chairs also discussed the increased importance of keeping all trustees engaged in democratic board processes.

Quotes:

“We hope that the Minister does not make too many drastic changes all at once”.

“We need to build on our strengths. Don’t just change for change’s sake”.

“Boards should continue to focus on student achievement and success”.

- 4. Chairs as champions.** Chairs tended to have been serving on their school board longer than the average trustee. Although many chairs expressed confidence that they were prepared to lead, if change was required, others suggested that there was an increased skill set required to be an effective chair including enhanced leadership skills and facilitation skills. Many suggested that the difficulty would be to encourage fellow trustees to embrace change and that chairs would need training in facilitation skills. They proposed that chairs would need to be attuned to provincial issue and trends and to represent their board in support or opposition to proposed changes. Chairs also suggested that a closer relationship between chair and superintendent was required so that they were aligned in their efforts to lead change.

Quotes:

“The chair provides leadership to the board – but it’s not always clear what that is.”

- 5. Uncertainty, doubt, skepticism.** Many chairs expressed doubt about whether the *Inspiring Education* initiative would result in anything more than the report. They cited examples of previous reports in health and other ministries that were never acted upon or the fact that not all of the recommendations of the 2004 Alberta Commission on Learning were implemented. They also drew attention to the fact that there have been four different education ministers in the last six years, each with an agenda for education and learning was never fully implemented. The majority of chairs suggested that there was no clear direction for the transformation of the education system with *Inspiring Education* at the ‘big picture’ or visionary level and *Inspiring Action* at the operational or tactical level. They also suggested that the draft Education Act document was more of a framework than a call to action. The majority of chairs had adopted the wait and see position of waiting to see if this minister would continue as minister and if the new Act and its regulations will be passed. Some chairs were clear that they would resist any changes.

Quotes:

“The greatest challenge is the uncertainty of where we are going”.

“We have a system that is slow and sometimes resistant to change”.

“Inspiring Education was a process to get to where they knew they wanted to go”.

“I don’t like the idea of an ‘Education Act’. The new powers are only busy work that will keep trustees busy but to what end?”

“There seems to be a concerted effort to reduce the role of trustees. We are struggling to find people who are engaged advocates for education and trustees and boards are made up of those people. If you remove more of these people you lose a core group of advocates”.

## Administrative Mindset

The research with school board chairs produced a picture of school boards who consistently talked about governance as if it were an administrative task. Chairs that identified boards as having superior governance practices proceeded to describe a set of administrative tasks performed in a largely routine and predictable fashion. For example, common responses representing good governance by school boards included reporting to the Ministry, monitoring the budget, setting the budget and implementing policy.

At best this set of tasks would fall within the fiduciary domain of governance, however, how these activities were described suggested that the higher level consideration associated with governance was largely lacking. For example, reviewing budgets and implementing policy are the tasks of administration (where as monitoring budget performance and monitoring policy effectiveness are governance responsibilities). The chairs talked about technical processes, incremental decision making, and board practices that seemed focused on detecting for errors and correcting them. How boards perceived their accountability to the Ministry may be driving this administrative mindset within school boards.

Specific subcategories are:

- 1. Administrative Bias.** Across the interviews chairs most often described governance in terms of tasks and activities such as setting the budget, reviewing the three year plan, attending school council meetings or addressing transportation issues. Many chairs shared their frustration of attempting to move the conversation and tasks to a higher level, only to be thwarted by trustees who focused on the managing the system and its people. Chairs sometimes identified the superintendent and senior leadership team as encouraging boards focus on clear management concerns through the construction of the board agenda. For example, some chairs stated that the agenda for board meeting and Committee of the Whole meetings were most often focused, sometimes exclusively, on the trustees’ fiduciary responsibilities or day to day management issues. Chairs shared their frustration of long agendas and long meetings and how “busy” the role of the trustee has become. Chairs were unanimous in their belief that students needed to be placed at the centre of the system, but few could cite examples where they engaged students to help the board set direction.

Quotes:

“Trustees often arrive with management knowledge and feel frustrated when they cannot manage the system”.

“The Three Year Plan is not a board plan; it is a superintendent plan”.

“How can a trustee hold down a full time job and represent the community?”.

“The top leadership skill is the ability to understand board policy and decision and to operate within them”.

“Most boards micro-manage things”.

“The superintendent keeps the board on track”.

“Chairs run meetings and try to be fair and receive perspectives from every area of the jurisdiction via trustees and public consultations driven by administration”.

- 2. Absence of a Governance Mind set.** The majority of chairs used language that would, at best describe governance as oversight of the system largely focused on the fiduciary responsibilities of trustees. A few chairs focused on language of long-term strategic planning. Most, however, did not view their jurisdiction’s Three year Plan as the board’s strategic plan. In the absence of this view, the language used by the Ministry such as “setting direction through key system performance indicators” or “establishing overarching principles” was seldom used by chairs in the interviews. Some chairs pointed to the government focus on accountability as “pushing” boards into more of a fiduciary role. Chairs were aware that they needed to increase board governance capacity and suggested that they needed to increase engagement with their communities and to learn more about generative governance.

Quotes:

“Boards should be looking forward to the future- let the superintendent deal with the problems of today”.

“The ministry still needs to control things through accountability”.

“You have to put resources into governance and system leadership to create a culture of learning and growing”.

## Discussion of Findings

The theoretical categories of role ambiguity, engaging disengagement, cautious optimism and administrative mindset define the space within which the transformation of school board governance is taking place in Alberta. The transformation of education and education governance specifically as expected by the Ministry and by the thousands of Albertans who were engaged in defining the kinds of educational transformation that are needed, is unprecedented in magnitude. The roles of the trustee, the school board, a wide range of community stakeholders, and government will need to change and the relationships between them renegotiated. The trustee and school board will have to develop the capacity – already in evidence by the actions of some school boards – to become active boundary spanners (Seel, 2007, pp. 138-140). The tension in appearing to widely engage stakeholders while creating structures (e.g., three minutes to present a concern in front of one particular school board) or processes (e.g., not allowing ‘special interest’ groups to engage the board) reflects one side of boundary spanning. Another aspect of boundary spanning is the movement of school boards from an administrative space to a governance space that allows trustees to realize public engagement as a major component of the trustee role.

This research highlights the significance of how important understanding boundaries is to the governors engaged in the transformation process independent of whether or not they support or oppose the changes being brought about by the Ministry. The questions regarding the kind of “order” that will exist during and after the governance transformation recalls Wuthnow’s (1987, p. 69) statement that, “Order has somehow to do with boundaries. That is, order consists mainly of being able to make distinctions – of having symbolic demarcations – so that we know the place of things and how they relate to one another”. Symbolic boundaries are the demarcations that include, define, and provide identity for some while excluding others (Epstein, 1992, p. 232). Symbolic boundaries create distinctions that “enforce, maintain, normalize, or rationalize” social boundaries that objectify “social differences manifested in unequal access to and unequal distribution of resources (material and nonmaterial) and social opportunities” (Lamont & Monlár, 2002, p. 168). When school boards, therefore, state that they need to engage the public while acting to segregating that public into preferred (e.g., passively accepting of what the board proposes) and not preferred (e.g., those that challenge the board’s tacit-collective knowledge structure (Newton & Sackney, 2005) in some way), they give evidence of:

1. how embedded symbolic boundaries are in the structures (e.g., how a structure such as the space where the board holds its meetings which places the public at a distance and often below the trustees) and/or processes (e.g., the minimal time given to the public to address the school board);
2. the asymmetric power relationship between the board (which is seen to wield the power in an educational jurisdiction) and the public (which because of processes and structures is powerless); and,
3. the enormity of the task to effect a change of culture within the school board and jurisdiction.

Ringeling (2005) distinguishes four “governance models” (p. 193) that represents the continuum of governance experiences presented by the school board chairs in this research:

1. command and control – the governing body defines the problems and solutions and uses “direct regulation as the main instrument” (p. 193). Other stakeholders comply with the standards set. At this end of the continuum, the instruments of governance (e.g., policy, regulations, administrative structure) are most normative.
2. Governance along main policy lines – the governing body “designs only the main lines of the policy, giving other actors the opportunity to specify the policy” (pp. 193-194). This approach is characterized by governors that set “framework laws and obligatory goals” (p. 194).
3. Selective governance – the governing body “intervenes only in certain crucial matters” which can change a course of events (p. 194).
4. Facilitating governance – the governing body addresses the question of “how to enable the self-governance capacities of other actors” (p. 194). The need to understand the problems facing stakeholders, their capacity to engage, and barriers that have to be addressed, for example, becomes a primary activity of the governing body. This end of the continuum is least normative with openness to alternative perspectives being part of the governance culture.

Ringeling’s continuum speaks both to the boundary spanning activities of the school board with their public stakeholders and to the boundary spanning activities of the Ministry with school boards. The degree to which there is greater symmetry in terms of power the more the relationship will have characteristics of facilitating governance or generative governance (Chait et al, 2005).

This exploratory research drew on the perceptions of chairs of school boards who could reflect on the governance culture of their boards in the past and who could anticipate what effects the new legislative context would have into the future. The four theoretical categories developed establish a “governance domain” for school boards. Little in terms of the concerns with school board governance has changed since the 1970s. By introducing legislation that compels governance reform across all 62 school boards in the province of Alberta, the Minister of Education is taking a bold step that is deeply unsettling for the majority of school boards. As school boards work to meet the required changes they will have to address the symbolic boundaries that define the current governance culture. This difficult work could result in improved relations as the trustees, government officials, and other stakeholders learn to span boundaries rather than defend them.

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