



Successful transitions

What to do when the school district leadership team changes

by Mayo Neyland and Rita Reynolds-Gibbs

“Unity: The board works with the superintendent to lead the district toward the vision.”

- *The board develops skills in teamwork, problem solving, and decision making.”*

—Framework for School Board Development

Each year, anywhere from 850-1200 new school board members are elected in this state. In addition, many districts bring new superintendents on board. With this many people moving in and out, the odds are pretty good that your district will have a change in its governance leadership team while you are on the board.

Change may seem like one of the few constants in education today, and there are some who will approach this seemingly constant turnover with a pessimistic view, shrug their shoulders, and try to get on with district business. On the other hand, there are those who believe that this type of change can be managed and should not mean a loss of momentum for the leadership team while the new folks learn the ropes.

Smoothing the learning curve.

Generally, it takes up to a full year for a team with new members to fully integrate those new folks and regain the previous level of performance. However, there is a realistic way to plan for and structure events so that the learning curve for new members, either trustees or a superintendent, is reduced to three to six months. This process is referred to as a leadership transition. It is a formal process that can be planned for and integrated into the normal routine of any high-performing team or school board.

What is a leadership transition?

A leadership transition is a purposeful process designed to integrate new members into the organization or team quickly. Through the process, they become productive play-

ers sooner than they would if left to discover how the team operates and what the priorities are on their own. The transition focuses not only on the tasks that the team feels are important, but also on the relationships between experienced and new members of the team.

The leadership transition structures the process of providing the important but often obscure information that new players need, and provides it earlier than they would normally find it on their own. It also addresses the critical personal questions of “Where do I fit in this group?” and “How can I make my important contributions to the team and district?”

Some may feel that the only thing new members need to know is what the top priorities and tasks are that the team must deal with soon. Experienced folks sometimes forget what it was like to be new and not feel comfortable in a new role. For new members to become effective, they must know what is going on and feel comfortable. An effective transition process must address both the new task and new relationship issues.

If you think back to the time you joined the team, you

will probably recall that the first year or so was a flood of new information and experiences. It was like trying to drink from a fire hose. It’s the same for anyone joining a new team. There is so much you need to learn—and much of it is not written down.

Common myths.

The concept of structuring a formal transition process for new leaders is not really new. The U.S. military began using a formal process shortly after Vietnam when leaders were changing every six months and turnover rates were almost 100 percent every year.

While not nearly as dramatic, school district governance teams often face frequent turnover, too. But formal transition is not particularly common in school districts. A formal transition process is valuable any time there is a change of superintendent and/or trustees.

A transition becomes critical when more than two or three members of the team change within three to four months of each other. There are districts that have been smoothing the leadership transition for some time, but they had to confront some common

myths about new team members first.

The first myth is that any board member is an experienced board member. When new folks are introduced to the team, an interesting phenomenon occurs. Overnight they change from citizens running for public office to “leaders” simply because a majority of their peers elected them to office. The public often believes that these new leaders know everything that is going on in the district and are familiar with all of the issues. They may even assume that the leader knows their child’s teacher or principal personally. If the new trustee or superintendent was a former employee of the district, that may be true. But for most new team members, this is the first myth that they must overcome.

Even fellow board members are susceptible to this myth. Other team members may assume that the new member has all the necessary knowledge and skill to actively and effectively participate in the team. This happens particularly when the new member is not widely known or the district is large and diverse. Experienced members may believe that anyone seeking the job must know what they are getting into and have the “right stuff” to handle it.

The second myth is that the organizational or team values that previously existed are also shared by the new arrivals. The team assumes that since the new person actively seeks admission to the group, he or she knows and believes what the team believes. They assume the new member understands how and why the team does business as it does.

This leads directly to the third myth that if the new folks share the same values the team does, they also are committed to, or “own,” what went on

before they arrived. This myth is most often discredited when the new arrival is introduced to the current budget or list of annual goals. Often the response is, “Fine, but when do I get my say?” The truth is, new members do not necessarily agree with what, to them, is the status quo.

Yet another myth holds that the Texas Open Meetings Act (TOMA) keeps the team from meeting for the purpose of getting to know each other better. It is clear that many boards have a perception that they cannot meet at any time for any purpose other than formal school business. While informal gatherings must be scrutinized as to their purpose, and board members must be disciplined to avoid deliberation of public business, board members are not prohibited from gathering socially. This misperception can have a profoundly adverse effect on the inclusion process for new members.

All of these myths serve the same purpose. They cause us to believe that there is no need to spend time rehashing the past or sharing personal information for the benefit of the new members. These things take time, and time is critical. The real problem is that not taking the time to orchestrate a successful transition really costs the team more time in the long run.

Why spend the time?

The benefits of conducting a purposeful leadership transition are actually very clear, especially if you think back to the time when you were the new person on the team. First, the learning curve for new member can be reduced from about a year to three to six months.

“Transition activities help new team members know how they fit into the big picture,”

Governance Guides

Leadership Transitions

The integration of new members into the governance leadership team through an effectively planned, purposeful series of activities can ease team transitions by:

- Reducing learning time for new members by as much as 75 percent
- Focusing on both team tasks and team relationships
- Helping overcome the myths about new members and the resulting misunderstandings
- Reducing tension on the team

To Ease Transition Before Elections

- Encourage candidates to attend board meetings
- Sponsor candidate workshops in your area to foster open discussion of board tasks and relationships

To Ease Transition of Newly Elected Members

- Conduct a local district orientation within 60 days of election or appointment
- Conduct a formal transition workshop to address board tasks and relationships
- Assign experienced board members to mentor new board members for six to 12 months
- Plan and participate in social activities that involve all members of the team
- Attend training events as a team

To Get Additional Help

- For publications applicable to candidates and new board members, call TASB’s Diane Aldridge at 800-580-8272.
- For direct services to districts such as new board member training sessions, transition or team-building workshops, or for information about candidate workshops, call TASB’s Lisa Carothers at 800-580-8272.

says Tom Etheridge, Columbus ISD Board president. "Everyone knows what their job is and what to expect. This understanding leads to smoother meetings."

As a result, less time is wasted during business meetings on "catch-up" questions from new members that delay getting to the business at hand.

Dee Hilton, Greenville ISD Board president, shares another benefit of transition activities: "The transition activities help all team members focus on their roles and responsibilities, big-picture issues, district priorities, and what is needed to ensure quality communications." Hilton adds, "The activities greatly assist in eliminating misunderstandings of priorities and expectations on the part of all team members."

Finally, if you take the time to provide information, listen to the new members' expectations and desires, and get everyone on the "same sheet of music" early, there will be less tension.

A formal leadership transition.

Some districts begin the transition process *before* elections. Trustees in some districts promote board service by letting the community know what the job entails in presentations to parent organizations and community groups. Others invite school district volunteers, leaders of parent organizations, and other community members interested in the district to attend school board meetings to keep abreast of the current issues. Keeping interested, active advocates for children involved with board business can encourage them to run for election, especially when openings occur.

If, during a campaign, candidates express views and values that are different from those of current board mem-

bers, it becomes even more important that the leadership team attempt to include these candidates in the transition process early to avoid creation of debilitating factions. One way to do this is by sponsoring local candidate workshops that discuss the roles and duties of board members and details of current issues the district is facing. This can help candidates understand the perspectives of current members and give current members some insight into the candidates' aspirations and priorities.

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Candidate workshops are sponsored by TASB, regional education service centers, and local districts throughout the state prior to May elections. Some districts present workshops about board service at times of year other than elections to inform the public of the board's role and interest potential candidates to consider board service.

"Each year, we devote two evenings to a workshop for prospective board members," says Jim Sneeringer, Leander ISD Board president. "One meeting introduces candidates to the role of board member, and the other presents our district and gives them a chance to meet our senior administrators. This is very beneficial for

candidates. It gives them a picture of how things work and a chance to meet some of the district's people. Also, it helps the district recruit qualified board members and familiarizes citizens with the operation of the district. People who come, if they decide not to run, often volunteer in other roles."

After the election.

After the elections, there are several steps that can be added to the transition process. The first of these, the local orientation, is required by law;

within the first three to six months so that they can understand and contribute to team actions. Information that may not be needed until later may be left out, but be sure to let new trustees know where the information can be obtained.

The local orientation may consist of more than one session. (A person can only drink from a fire hose for so long before he or she chokes!) Hilton says, "Our board-superintendent team offers a local orientation conducted by the staff and the board president. Our new board members also attend TASB Spring Workshop and Summer Leadership Institute."

Relationship issues.

While a local orientation may cover a lot of basic information, it usually does not address relationship issues. To assist with this, a more formal leadership transition workshop for the entire team may be called for. This workshop may last from four to 12 hours and should be directed by a skilled facilitator.

A knowledgeable facilitator can plan to achieve a balance between task issues such as identifying team or district priorities for development and relationship issues such as personal expectations for working together and the desires of the new members to be a part of the team effort. In the past, many boards conducted what they referred to as a "board retreat" for this purpose. The recent requirement that all board meetings be held within the school district boundaries has caused some boards to discontinue retreats, but there are other ways to structure a workshop within the district that will address transition issues for new members and the team.

"In Gilmer ISD," says former board president Dean



Haws, “we set up a transition district goal-setting session in which a facilitator from TASB guided our discussions about where we were and where we wanted to be. This not only familiarized the new team member with the district, it established greater understanding and set the stage for our annual district planning with district administration six months later.”

“Our most important transition activity was our team-building workshop,” notes Columbus’ Etheridge. “At times we all feel that we have a large ship that is lost in a storm. Our team-building session gave us a sense of belonging and togetherness and showed that none of us is alone.”

Mentor program.

Another leadership transition method, used by the Leander ISD Board, is a formal mentor program in which an experienced trustee agrees to sponsor or host a new trustee for the first six to 12 months of the new term. This method is successful as long as both parties agree to the relationship and the sponsor commits the necessary time for supporting the new member on a continuous basis. Most mentor programs require at least one to two hours a week, perhaps more on board meeting weeks. This program can give new trustees a ready source of answers to the questions they forgot to ask or to the ever-present “how’s the best way to handle . . . ?”

Social events.

One of the most overlooked ways for a leadership team to facilitate a transition process is simply to plan some social events that allow all members, and perhaps their spouses, to get to know one another better. This method is

overlooked because of misinterpretations of what is permissible under TOMA.

One idea that may be useful for socializing is for board members, the superintendent, and their spouses to take the new trustees and their spouses to dinner. A leadership team may also agree to meet and go to the Friday evening football game together or work the VFW or band boosters booth at the game. Arrange these events at board meetings, publicly announce the time and place for the activity, and emphasize that the purpose is to get better acquainted. Remind everyone that district business will not be discussed. In these informal environments, relationships are strengthened.

Attend Convention.

An action that can serve to strengthen the transition pro-

cess is for the leadership team to plan for and attend the TASA/TASB Joint Annual Convention as a yearly event. Not only are there numerous opportunities for continuing education, but there are many opportunities for the new trustee to talk with other trustees from across the state and explore different approaches to the business of governing school districts.

The time the team spends traveling to and from the Convention, coupled with frequent opportunities to socialize during Convention, provide a wealth of time to build stronger relationships among team members.

The bottom line.

The integration of new trustees or superintendents into the existing governance leadership team will occur—even if

you do nothing to assist the process. The real issue is how much time can the team afford to spend going back over something or wrestling with ambiguity and lack of clarity about what is important.

You can plan a purposeful transition and minimize the disruption, or you can do nothing and deal with what comes. In truth, leadership transitions are a lot like school building maintenance: “You can pay me now, or you can pay me later.” Which way is safer, smarter, and more economical in the long run?★

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TASB *can assist*

TASB has developed a number of products and services that can be used as part of a leadership team transition process. For candidates, there is a video-based training package entitled *A Call to Service Workshop Packet* and a publication entitled *Guide for School Board Candidates*. Both contain valuable information for potential school board members.

Additionally, TASB coordinates candidate workshops across the state for the convenience of area school districts. For newly elected trustees, there is a free New Board Member Information Packet sent to all new board members, a New Board Member Packet of publications especially for new board members, including *Now Serving: A Quick Start Guide for Newly Elected School Trustees* (also available separately) and a video-based training packet entitled *Getting on Board: An Orientation Package for New School Board Members* that contains valuable information for new trustees and is designed for teams to view and discuss together to help new members and veteran members share perspectives on the board’s role. For more information on these videos and training material packages, call Diane Aldridge at 800-580-8272 or 512-467-0222.

TASB also offers facilitated leadership transition workshops designed to meet each district’s specific requirements. Training for new board members is also offered throughout the year at events such as Summer Leadership Institute in June, the TASA/TASB Convention in September, and Spring Workshops scheduled throughout the state from February through June.

New board member training can also be arranged locally for clusters of districts that wish to share expenses for a local workshop. For more information about direct services, call Leadership Team Services’ Lisa Carothers at 800-580-8272 or 512-467-0222.★