

Oversight or Overreach?

Its all about best practices.

Presented by:

Teri Rhodes and Mark Clement
USBA



Table Discussion:

Define Governance vs. Management

Governance

Purpose:

- To provide strategic direction, establish policies, and ensure accountability and ethical operations.

Key Activities:

- Setting organizational vision and mission, creating strategic plans, approving major policies, overseeing performance, and ensuring fiduciary responsibilities are met.

Who's Involved:

- Typically a board of directors or a governing body.

Focus:

- Doing the right things; ensuring the organization is well-guided and aligned with its mission and stakeholders' interests.

Management

Purpose:

- To execute strategies and policies, manage daily operations, and control processes to achieve specific outcomes.

Key Activities:

- Implementing strategies, managing resources (people, finances, etc.), developing and executing financial plans, overseeing operational processes, and reporting performance to governance.

Who's Involved:

- The CEO, management teams, and various departments.

Focus:

- Doing things right, efficiently executing tasks, and achieving objectives set by the governance framework.

Key Differences in Focus

Scale:

- Governance operates at a higher, broader organizational level, while management focuses on specific, operational activities.

Questions Asked:

- Governance asks about strategic direction and organizational health, whereas management addresses operational details and process execution.

Delegation:

- Governance delegates the authority and responsibility to management to carry out tasks and implement plans

Personnel – Oversight or Overstepping

Be professional, respectful, and focused on the overarching goals of the district

Avoid involvement in day-to-day employee matters, interacting primarily through the superintendent .

You learn that a teacher has been posting her artwork on social media, which includes several paintings of nude forms. What do you do?

Facilities & Procurement – Oversight or Overstepping

- Ensure that school district facilities are operated and maintained properly, and that they are used in accordance with district policies.
- Establish guidelines and procedures for procurement that conform with state code.
- You learn that the district has gone through the procurement process to enter a contract, and you receive a complaint from a contractor that the process may have been unfair. What do you do?



Complaints – Oversight or Overstepping

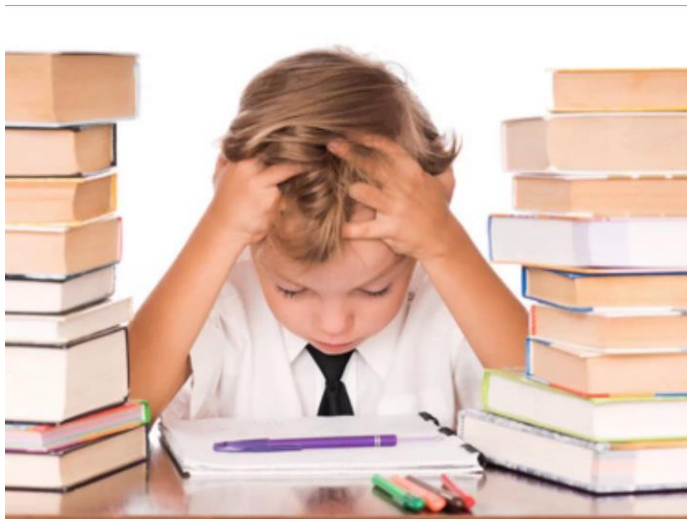
Follow the chain of command
Whenever possible.



After visiting a school, the principal contacts you directly with her concerns about an academic program. What do you do?

Programs & Curriculum – Oversight or Overstepping

- Set broad direction for what is taught.
- Ensure alignment with state standards and district goals.
- Your daughter and grandchildren are in another district, and they tell you about an incredible robotics program that every student must experience. You find out that your district is using a different, supposedly lesser program. What do you do?



Questions to Help in Oversight Role

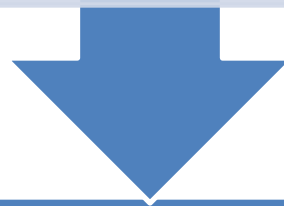
1. Is there a commitment to a shared vision of learning for all students?
2. Is there a defined process for resolving conflict and making decisions?
3. Are the roles and responsibilities of the Board, BA, and Supt clearly defined and understood?
4. Does the management team model the behaviors and actions that are desired in your schools?
5. What does success look like?

Distinguishing Oversight from Overstepping

(Micromanagement)

Oversight

Focuses on management system



Overstepping or Micromanagement

Focuses on individual actions

Building & Improving your Oversight Systems

Oversight is proactive.

May require formalizing some practices.

Will take time to develop and implement.

It's an important part of the board's job.

Oversight or Overstepping?

Each Board member must be vigilant and reflective about his/her personal role on the Board in oversight, while avoiding overstepping.

Collectively the Board, Superintendent and Business Administrator work collaboratively together as the leadership team of the district—the Board answers What, the Superintendent and Business Administrator answer How.

