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**PART 2: FROM THE MAIL ROOM TO THE VICE PRESIDENCY: THE SOCIALIZATION OF ALBERTA SCHOOL TRUSTEES**

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**LEARNING TECHNICAL THINGS**

As was true for Stout's participants, technical matters are big challenges to the newly elected trustees because there is so little time to prepare between election and assumption of office.

The budget is the biggest concern.

*Guy: ...and the process of the budget was very enlightening and it's a scary one too because of the external factors. Sometimes you have to put the cart before the horse. You take an educated gamble.*

*Dave: I knew there was a budget and how much it was, that is the top figure, and I had an appreciation of the portion of the budget that is salaries and benefits for example, but I learned about all the sources of funds and I learned about all the expenditures. Well not all the expenditures because there are expenditures there that I haven't learned about yet. I'll learn about them in the next two years because I don't understand some of the expenditure lines completely. I have an advantage, that is my background and I went on the audit and finance committee so this question is skewed because of my interest in that area.

Cam: There are a lot of zeros just after those numbers...It's like one of those oil tankers. If you decide to turn it, it takes a lot of time to turn it. You've got to know that changing that budget is like turning that oil tanker. A lot of people have put in a lot of work and just because a trustee or two or three wants to change it, it's going to take a lot of careful maneuvering.

Amy: It's an awful lot of money. You don't think of all the things we pay for. It's more than books and chalk and buses. When you consider the painting and repairs; everything we pay for. I learned about things like wages. We're a very generous employer, especially in terms of wages and benefits. I had my eyes opened. The only time in an orientation when I got real confused was the budget. And I'll tell you with the budget I said to somebody about this job, "It's like going from working in the mailroom to being vice- president."*

*Because you have a general idea. I think I know and when you get there and go holy cow, I never realized it was so big. Now we are looking at something like 3.2! I have trouble spending $30 and you want me to spend 3.2 million dollars. So it's awesome*.

*Dan: [I learned] probably that the discretionary area is somewhat less than I thought but I'm still not entirely clear about that.*

The new trustees had concerns about other technical matters as well. Amanda expressed concern about the curriculum, for instance:

*I'm concerned about the curriculum I wasn't aware of some of the curriculum that was out there at the lower levels because my youngest is in grade nine. I was a little surprised to see the curriculum that was picked.*

Nine of the 10 new trustees mentioned some area in which they were not ready to deal with a decision that came to them early in their tenure.

*Sara: The contract that had been ratified prior to my arrival for the bus drivers. That was at my first public meeting. There had been no prior understanding of the process. At which point I learned that in the School Act you cannot abstain. I felt very awkward in making a vote without having the knowledge to back me up and I was forced to vote.

Brian: What happened at the beginning was that when decisions came up I probably wasn't as informed as I should have been to make a decision so I pretty much followed the people who were experienced. I did make the decisions on my own but that first board meeting I pretty much followed everybody else.

Dave: That was the first little bit of excitement. I didn't know what the heck this was all about and I did a lot of reading and looking around at audited financial statements to try to understand where we were. Still that was very surface; it was all done for us. The auditors asked more questions than we did.

Neil: The trustees could have been a little bit better at explaining things. One helped me a great deal but he was the only one doing it. It was good. That helped but I don't know what else they could do.

Dan: The other one is the focus on results. For me that's a focus on excellence and achievement in the system. One of the things I intend to do next year in the budget process is that we attach the achievement results that we have in our system to the budgets of the individual schools so we're not only looking at expenditures and efficiency of how we're operating the system but we're looking at what we are achieving with those dollars.*

The new trustees have a great deal to learn. They need information. Both Stout and Tallerico have shown that school board members reach pretty widely to gather up the information they think they need. Alberta trustees are no different.

*Cam: Externally, I'm at the point where I'm trying to set up my own kitchen cabinet. What got me thinking about it is that I do some running and was running one day with the manager of [company] and we were discussing management systems and school boards. It was striking to me the different perspective he was coming from. I thought I should get three or four people like that who have good minds, preferably arm's length from the school system, create a feedback loop and then see the quality of the feedback. We could see if that would help us find ways to solve some of these things.

Brian: Externally there's not anyone in particular. I discuss some things with friends and in fact the whole community. I know just about everyone here.*

*Sara:Internally, the secretary-treasurer and I are pretty good friends. I could get the straight goods from her. Externally, my husband. Always. I don't have to finish my sentences with him. I can turn up to warp speed and know that he can fill in all the gaps because he knows exactly where I'm coming from.

Dan: Internally, I'm starting to develop sources of information and people that I can go to for off the record conversations so I can start checking my perceptions. An example would be the one where I asked about fat in the system...I like those conversations because they're giving me a broader perspective on what can and cannot be done.*

Sometime within the first 12 months in office these new trustees began to get a sense of self and of the larger political/social arena in which they were obligated to participate. In short, their novice status began to give way to a richer, postulant status.

**THE SEASONING EXPERIENCES**

These new trustees became attached to on-going groups. To become members of these groups required that they decide they wanted to be and that they were willing to pay the costs of learning and abiding by the rules. Their first experiences were tentative by and large and they had comments about them:

*Neil: I'm not totally satisfied with what happens at the board meetings. I really believe that the way the board meetings are set up and the way the laws are, we can't get participation of people involved and that really bothers me. People who want to participate can't and a lot of people won't allow them to. They say the board meeting is a very structured legal thing and we have only those people who can vote. But even to get their discussion in discussion period, why not bring them in and let them discuss if they want to?

Dan: My biggest disappointment continues to be the incredible inertia in the system and the horrendous amount of paper and documentation that we're constantly approving, and still not being able to grab the issues that the board identified as being important.

Guy: Definitely I'm a member of the group. I became a member as soon as I became a little better informed about the issues we are dealing with presently and the background to them. As I became more familiar with the kinds of issues that are dealt with, I felt appreciated and when I had something to say I was listened to.*

Stout examined the relationships with four groups that seemed to her participants to be sources of influence in bringing new school board members into the folds of the various boards. Alberta trustees commented on the forces of the same four groups; other school board members, administrators, constituents, and teachers.

**FELLOW TRUSTEES**

With one or two exceptions, the new trustees had not known the other trustees professionally or socially. But they began to make both judgments about and connections with the others.

*Amanda: I would like to see the board be a little more helpful. Make us feel more welcome. I'm not knocking my board because they said to ask questions but sometimes you don't want to always ask. It's nice if it comes from the other side.

Sara: On the other side, I've become very cynical toward the political process...I think we work on the hidden agenda mentality...I'm sure everyone has good intentions. I'm not questioning their intentions but we are not effective and I don't see the environment for change. It's hard enough when you're in the soccer match and 4-3 wins. I have to be satisfied with small steps I guess but there are some issues that can't be deal with that way.

Brian: You have to have differences. That's what makes for good decision making. We have a good board. Everyone contributes.

Kirk: Oh I would say so [a good board] in spite of the split. We debate and there would be some split votes. The big one yesterday was an attempt to rescind our transportation policy on pay-ride busing. We had the debate and the majority voted to retain the policy.

Cam: This one particular guy just has one of those very good minds and honest and bright as hell. He and I sort of gravitate toward each other because we have similar backgrounds and we are not hung up on the administrative trappings. Neither of us has been involved with a school system previously so we don't have to drag all those dead cats with us.

Dave: The nature is I think that one of the trustees seems to have a personal vendetta directed at our CEO and that goes back, I find out, to a time when this trustee was employed by the district as a consultant.

Amy:I had people on the board who I knew. If I had had to come in that first day by myself, I don't even know where to go. The other new trustee and I often went for lunch too. They sometimes forget the new trustees. I would ask that they not make the new people speak right away either. They had a reception the first day with staff and everybody and they asked us to introduce ourselves. The last thing you want to do is stand up in front of all those people who are judging you and comparing you to your predecessor.*

**THE SUPERINTENDENT**

As the first year in office progressed the new trustees began to form judgments about both the office of superintendent and the occupants they were coming to know.

*Neil: I learned the difference between the old superintendent and the new superintendent. The old-style teaching superintendent, education process, and the new style and I was very lucky to be able to see that in the transformation from [the old] to [the new]. There's a substantial difference in the way they operate...I call it the new style and the old style but it's just different ways of handling it. It is a more open way now. I don't mean to say one is better than the other, but I do like the open style better than the closed style.

Dan:...In the kind of concerns one has, that you're being snowed by the administration is one that is inevitable. The more information they give the new trustee, the more suspicious the new trustee is going to be that they're being snowed. On the other hand if you don't give them the information then you handicap them. If you're going to err you better err on the basis of too much information.

Sara: It's a very powerful position. Too powerful and if you don't do your homework and if you don't keep your eyes and ears open as a board, a lot of things can happen. I have my sources and I hear the presentations made as to the facts. Then I've heard how it really happened. Let's say promotion. When you're given the impression that it was an open competition when it fact it was a done deal; when you're made to believe we're making the decision when in fact it was a fait accompli. That's fair game if you have disinterest, lack of interest on the other side.

Amy: Ours is the only one I can comment on. He still intimidates me. He's a marvelous person, a neat person and I often wish we saw more of him, the person. He has a marvelous sense of humor but it doesn't come through very much at the board table. He is very well respected. I think he's caught in a very difficult position because the way this board is fractured. He's caught right in the middle.*

These comments point to what Tallerico has described as an almost endemic contest between policy makers and executives in the public arena. Weber (1946) had argued earlier that public policy makers were routinely faced with difficulty in bending the public bureaucracy to their wills. Bureaucrats had long tenure, a full time opportunity to consider complex issues, access to vast amounts of information, and the capacity to stall, deflect, or prevent issues from coming to the policy making table.

Tallerico's research provided rich detail about the strategies and tactics both superintendents and school board members used to set and gain their own agendas. Just as Cam expressed a concern about the "gotcha" of agenda-setting, these trustees also expressed ambivalence about their relationships to the superintendents. Even as newly-elected trustees they had both criticism and praise for the superintendent. It is not unfair to say that they were encountering situations that have troubled and perplexed both senior policy makers and scholars for some time.

**CONSTITUENCY**

One of the key questions facing the new trustees, as previously discussed, is that of responsibility to constituents. These new trustees had to make choices about how responsive to be. They made different choices, as shown by the two responses below, which reflect the poles of the responsiveness continuum.

*Amanda: I've had some parents call me on different little issues, more to inform than to get results. I think they're testing me by asking questions that could be directed elsewhere. I always respond to them by going to the right source and getting them to respond to them and then get back to them to see if they have their answer. I'm not sure what I'm supposed to do sometimes so I guess I just act on instinct.

Cam: Now I have people tracking me down at the office. I had a phone call today from a major utility company.

I saw the name on the note and felt it should ring a bell. I called back, left a message and she called back. Sure as hell, she's got time on her hands at work and said she'd like to know why I voted the way I did on an issue at the board meeting last night. And she also wanted me to explain what the motion was. I said I didn't have any of the stuff with me and I wasn't going to try to do if from memory. She's at work with her feet up sort of telling me or explaining to me or asking me questions about one of the major issues we're dealing with.*

**THE TEACHERS**

Most of the new trustees had formed their impressions of teachers before they became trustees. But perhaps because of the influence of the ATA and the intensity of the bargaining process, most of the trustees in this group had begun to view teachers as more a collective "they" than as individuals, and some recounted experiences which affirmed for them that teachers were not necessarily good-hearted, public servants with the best interests of children in mind. Sara's story was told by others.

*Sara: Well, I'll tell you something. I try not to be cynical and to read into things, but I feel pretty confident with my track record with regards to intuition. The teachers were so nice to me when I was running, it was just dripping, even the kids said, "My God, mom, this is getting to be sickening, how nice they are, and how are you today, and how is your mother?" [She then told a long story of having been badly misquoted in the paper with respect to her views about raising teacher salaries.] Well, the next day I was in the staff room and I got the coldest shoulder that you could imagine. Then I heard little sly remarks about someone else who was running, in ward one, boy, so and so is a teacher hater and these kids of hers were coming back and forth. This is another reason why I'm not comfortable at school because I had been in this situation where something I had done, and I was justified in doing it, and my child has suffered for it...I have to have thick skin. But I don't have thick skin when it comes to my kids and that is my biggest fear is how will they benefit or suffer from my being a trustee. If someone were to say what is your biggest concern, that is it.

Neil: There's going to be some criticism there if we don't change our ways but they are pretty lenient with us at this point. One of the things in changing the ways is the secretiveness of how we do things. [The local community is becoming upset by not being allowed to know more about how we do things]...and even why teachers who treat children badly are still there. In any other profession they would be railroaded out. Also not providing the education they are supposed to be providing.*

A second issue concerning teachers had to do with collective bargaining and conflict of interest. The Alberta School Act of 1988 is specific about conflict of interest. Courts in British Columbia have ruled that voting on teacher collective agreements by people active in the provincial teachers' association constitutes a conflict of interest. Those whose spouses or children work for the district may also be subject to conflict of interest. This has presented some difficulty for at least one of the boards in this study (the one on which Cam sits) which at one time only had two persons who could negotiate and decide on the teacher contract.

**THE PRESS FOR AND AGAINST COHESION**

Stout identified forces which may account for the seeming unanimity in public of the school boards in her study. Among the most powerful were their common sources of information (primarily administrative staffs), the influences of other board members, the lack of clear external constituencies, and the requirement that their business be conducted in public. Because Alberta law permits trustees to conduct business in committee, the influence of public meetings may be lessened, but these trustees acknowledged that they did work to reach unanimous public votes. They, however, sometimes attached qualifications to the idea of consensual voting.

*Dave: There will be a split on the board on some issues. I think that this board on a large part is going to recognize the needs of the district and will be fairly unanimous.

Brian: I would say there's usually one person out, opposed. There's usually a laugh over it and that's the end of it. It's not the same person every time. Basically we're all in agreement.

Sara: We have some where history is important, where one person votes a certain way and when their friend or partner votes the opposite way, they'll change just to be the same. They're game playing and they are not based on a true informed knowledge base.

Neil: At first there was a lot of unanimous decisions. That has changed now to more of a 4-3 decision system. It's not the same three or four every time but it's similar groupings based on their understanding and where they come from. In the controversial issues you'll see the people that have been trained in education looking at it one way; those trained in business looking at it another way. Those seem to be the two groups. It's not always the same people. There's a little bit of switching. There are those two factions. After we make the decisions though everyone is supporting them. I've learned which ones will listen and which ones won't and I know where their position is on a lot of items.

Guy: I mentioned in one of our earlier interviews that I would have difficulty supporting in public a decision that I had voted against in a board meeting. I'm beginning to mellow maybe a little bit on that because it's nothing personal. You have to detach yourself.

Dan: This is the strangest organization I've ever been in. Nobody talks to one another. I'm continually trying to understand why this occurs. The superintendent told us of the Sunshine Laws where if any two trustees were to get together it has to be publicly announced. It's as if our board were operating under that principle. There are clearly some understandings among people in terms of their support for one another. It's the strangest thing I've ever seen. It's as if the board is afraid of the public. People don't talk to each other, they talk to the minute book.

Dave: I know that after this one conference meeting when this one trustee locked horns with our CEO, the very next day we had a board meeting at noon and I and the chairman of the board walked in at the same time and he came in through another door and by his actions I felt he was alienated. He had alienated himself. It was understandable because you go home and say, "I acted like an asshole." It's pretty hard.

Amanda: Sometimes that's where I have a little struggle because sometimes I'm too honest and they tell me to use a political approach. So that's sometimes a bit of a stumbling block for me I think. Like the time I had
to make a decision for a local fellow here. I went with what I felt not the political approach I could have done and looked good. I'm in there to do a good job for the system as a whole and if you go in just to be voted in again it's the wrong attitude. I know a lot of them do it that way.*

Much of the research on group cohesion is conducted with informal groups where friendships play an important part in group formation and maintenance. With this in mind the trustees were asked how important it was to maintain friendly relationships with other trustees.

*Guy: I don't see our board members trying to upstage another member or trying to catch the limelight or trying to have their name attached to everything good. Maybe that's why we get along so well. And it's not that we're friends. I respect them a lot but I don't socialize a lot with them. There are no publicity mongers around the table and people are given credit for what they do. It's as simple as that.

Amy: I think it's very important. I really do and I don't mean be falsely charming so they'll vote for my motions but I think it is important for them to know me, to know where my values and thoughts are. I think it's important to know people and the only way to know them is to be friendly with them. I'll tell you what I think should be done. Another trustee and I were both new and in January we went to the principal's retreat in Jasper and we drove there together, a four hour trip. We developed a real rapport, talking about families. Since then we are closer than I am to anyone else on the board. Everyone should have to get trapped for three hours in a vehicle together. On the way back another board member joined us and it's amazing how often we refer back to that trip.

Amanda: I think it's important to remain friendly but also be able to stand alone because if you can't do that then you're just a fence sitter and I don't believe in that. We're there to make major decisions and we shouldn't just go with the flow. I told my chairman I just keep my head down when I'm thinking about what decision I'm making and then my hand goes up and I never watch what others are doing. He told me I should be watching the others but I don't want my vote based on what they are doing.

Sara: Paramount. We don't have to golf together but you have to remain friendly. I've always believed as in a good marriage the sun doesn't go down on a fight or a tiff. You always have to patch up the differences and that's what a lot of time is spent doing. It's a follow up phone call saying I hope you realize I was just teasing you. A lot of that because I don't ever want to walk into a board room and feel someone is boring holes in my back with their eyes.

Cam: Quite important otherwise you're going to pay for it physically and mentally, if you're always going into a tension filled setting and you never know when the guy behind you is going to knock you over the head because he has a hidden agenda of his own. To a large extent now we're starting to see the same responses because some have their own way of going about things. Like every time we are talking about money, one says we have to go to tender. Others by sheer repetitiveness, we are seeing the patterns they are using.*

**SUMMARY**

Local governance of education has been in place in Canada for over 100 years. During the past several, critics of all political persuasions have begun to question whether local school boards are adequate to the task of improving education. What has been shown in this paper are the dilemmas and concerns of ten newly-elected Alberta school trustees. During their first year in office these ten citizens worked to reconcile their prior statuses as relatively active citizens with their new statuses as officers of government, politicians. They ran with vague, but evidently good-hearted, intentions to help make matters better. They did not run as aspirants to other political offices. They ran at times in their lives when they were open to notions about civic responsibility and giving something back to the community.

From the moment of election they were faced with an array of inter and intra-personal choices, with complex technical and human issues, and with their obligations to choose sides on issues which were strange to them. They relied on whatever information they could obtain and on their own values about what is the right thing to do. They were capable of resisting pressure from their friends and neighbors and from other trustees. And they worked very hard, perhaps as many as 15 hours a week on average. What is of interest is that they matured during the year, even while experiencing multiple pressures. They became more sophisticated about the agendas of others, their own agendas, and the complexity of school systems. And they did not lose faith that what they were doing was important work, even though three of them contemplated resignation during the first year.

In this study we have shown both the complexity and simplicity of democratic politics played out in local jurisdictions. The complexity arises from the nature of making choices in situations where values are important, where technical issues are fluid, where the stakes are relatively high, and where correct answers are not self-evident. The simplicity is shown by the fact that these ten people learned how to do it. This study, while guided by the work of Stout, is not a replication of her work. We have not attempted to name the phases of socialization as she did. But most of the forces she identified as important in the socialization of trustees are identified in this study. We did not discover quite the influence of the Superintendent that Stout did. In that respect our findings are more consistent with those of Tallerico. Beyond that, we can say that trustees in Alberta and school board members in Arizona have experiences which are more alike than different as they change from citizen to elected official. While a number of issues have been explored in this study, a number remain for further analysis. We have no way of telling whether these trustees will continue to change with increased tenure. Having followed them for a year we have some idea that they are adaptable and capable of learning. But a longer look might be instructive. Such studies are not yet in the literature.

A second issue left unanalyzed, and outside the scope of this paper, has to do with gender. Tallerico hinted that the women school board members were more assertive and less likely to take the superintendent's view of things than were men board members. Stout's work did not indicate this. Because of the small sample in this study, we are hesitant to reach any conclusions about the matter. But a larger sample of school trustees might shed light on the degree and kind of gender differences that exist, if any.

Finally, we did not study the degree to which these new trustees got their agenda items implemented. As the year drew to a close, most were waiting for their chances to have influence. A study over a longer period might provide evidence about persistence and strategies which trustees find successful in influencing the direction of the system.

**CONCLUSION**

In Canada and the United States many questions are being raised about the adequacy of locally elected boards of trustees to govern and improve schools. Some argue that boards of school trustees are too disconnected from general politics to have sufficient influence to force school employees to improve performance. Others argue that local jurisdictions are too small, and consequently, too inefficient. Others argue that local systems can be captured by special interest groups. These are large issues being fought out in federal and provincial arenas. And we do not presume to offer conclusive evidence about any of them. But we have shown, we think, that these ten people in these eight districts have taken seriously their obligations as citizens in a democracy. They put themselves into public view with no evident self-interest. For all of the uncertainty, ambiguity and frustration they encountered they continued to express faith in both the system they were attempting to govern and the processes of democratic decision-making. We are tempted to argue that these people represent the essence of democratic government; citizen governors attempting to do the right thing, without thought of personal political consequences. We believe it would be high cost for public schooling if people of this kind were replaced by people and systems which were more distant from the governed or less vulnerable to the political pressures of those who receive the services of the public enterprise.

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| **APPENDIX A: INFORMATION ABOUT EACH OF THE PARTICIPANTS** |
|   | ***AGE*** | ***EDUCATION*** | ***RELIGION*** | ***OCCUPATION*** |
| Amanda | 45  | High School | Protestant  | Bus Driver |
| Amy  | 44  | Technical  | Protestant  | Health Care |
| Brian  | 39  | Technical  | None given  | Farmer |
| Cam | 56  | B.B.A. | Roman Catholic | Businessman |
| Dan | 48  | B.A., M.B.A.  | Ukrainian | College Teacher |
| Dave | 60  | B.Ed.  | Roman Catholic  | Retired School Principal |
| Guy | 46  | B.A., B.Ed.  | Roman Catholic  | School Administrator |
| Kirk | 59  | B.Ed., M.Ed.  | Protestant  | Retired |
| Neil | 44  | Management  | Roman Catholic | Chartered Accountant |
| Sara | 37  | B.Sc. | Roman Catholic | Farmer |