

On Board

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The Policy Bowl—A tool for policy development

You've heard of the Rose Bowl, the Sugar Bowl, the Orange Bowl, but what about the Policy Bowl? No, it isn't a football game or a new stadium. It is a helpful tool for developing board policy. Sound intriguing? If so, read this issue of ON BOARD. You may find some new ways to help your board speak clearly and deliberately on important school issues.

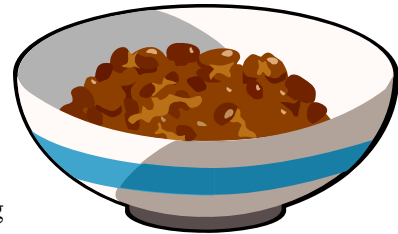
A governing board faces a big challenge as it attempts to express itself through policy. The challenge lies in developing policies that avoid several extremes:

- Policies that are too broad may fail to accurately express directions or concerns the board wants to communicate. This can result in confusion by staff and constituents about the board's intentions.
- Policies that are too detailed can constrain staff creativity. And, such policies require a significant investment of the board's time and energy to develop, thus hindering the board's efforts to deal with other important issues.
- The absence of written policy leaves the board without a means of speaking corporately, resulting in inefficient use of board time and raising the potential for inappropriate influence by individual board members.

Policy writing is not easy. Effective policies are the result of much study and deliberation. Care is required to ensure that policies are specific enough to be clear, but not overly constraining. As with many aspects of the board's work, doing so requires much wisdom, discernment and prayer.

What is a Policy Bowl?

Sometimes, a simple image can be a helpful way to envision a task. Imagine a set of mixing bowls. Most



kitchens have at least one set - a large bowl and several smaller bowls of decreasing size that fit snugly inside the next larger bowl.

Now imagine that the set of mixing bowls represents a set of board concerns related to a specific issue. The largest bowl contains a very broad statement relative to the issue. Smaller bowls, each containing slightly more detail and specific statements, are added as needed so that the set of bowls contains a clear record of the board's values and perspectives.

The Purpose of Policy

With this image in mind, it may be helpful to review what a board policy is designed to

accomplish. A policy expresses a board's values and perspectives regarding a certain aspect of an organization's life. A well-developed policy clearly describes to the organization's owners, staff, and other stakeholders the board's position on specific issues.

A unique feature of governing board is that they are comprised of diverse individuals who speak with one voice on matters of importance. Policy is the voice. Without written policy, a unified voice is difficult to achieve. Written policy helps ensure an accurate expression and record of a board's thoughts.

Policy Bowls

A board's major value to an organization is its role in maintaining focus on the "big picture." A board, in concert with the chief executive, establishes vision and monitors organizational activities to ensure consistency with the vision. This requires a great deal of time, wisdom and prayer.



However, for a variety of reasons, many boards forget about this important role. Instead, they get caught up in

administrative issues and decisions that require so much time to resolve that staying focused on the big picture becomes impossible.

For example, a school board may be asked to address the issue of whether students should be allowed to wear T-shirts to school. A board could invest significant time and energy trying to establish whether T-shirts can be worn to school. In all likelihood, such a discussion will expand to include questions about the type of shirts that can be worn and what words, logos, or colors are appropriate.

Dress code issues are important in most schools. In this case, someone needs to determine whether T-shirts are appropriate dress. But, does it need to be the school board? Developing board policy using the policy bowl concept can be a helpful way to address this question.

Into what size bowl does a specific issue such as wearing T-shirts fit? Is this the largest issue related to student dress and appearance, or does the T-shirt bowl fit within a larger bowl containing a broader, more comprehensive perspective?

Begin with the Big Bowl

The policy bowl concept pushes a board to consider the size of the initial issue and the context, or bowl, it fits within. Once a broad perspective is established and expressed, a board can make additional statements that address increasingly specific issues and concerns.

Key Questions

Responding to several key questions can help a school board use the policy bowl concept effectively:

- *What is the presenting issue?* Be sure there is an accurate understanding of the issue at hand.
- *What policies already exist?* Research whether any policies related to the issue already exist.
- *Is there a larger issue?* What are the broader values and perspectives within which the presenting issue fits? Seek the broadest possible expression – the policy that fits the biggest bowl – in order to provide important context for discussion and activity related to the issue.
- *Are we comfortable with any reasonable interpretation of the broad, "big bowl" policy by the principal?* Effective policy provides clear expression of the school board's values and perspectives, so that the principal can operate the school in a manner consistent with



the policy. Once a broad policy statement is in place, a board can determine whether it has said enough and is comfortable with any reasonable interpretation of the policy by the principal

- *What more needs to be said?* If a board is uncomfortable and feels that it needs to say more in order for the principal to have a clear understanding and an appropriate sense of direction, additional, “smaller bowl” policies can be added. Increasingly narrow and specific policy statements are added until the board is comfortable with any reasonable interpretation of the policy.



A Case In Point

The St. Paul Lutheran school board is informed by its principal that

several faculty members are opposed to the current practice of allowing students to wear T-shirts to school. In the faculty’s opinion, this type of dress is too casual for the school setting.

In recent years, the principal and faculty have developed the student dress code. Because of this, the board engages in a healthy discussion about its role in this issue. Ultimately, the board determines that some expression of the board’s values and perspectives related to the topic of student dress and appearance is appropriate. However, rather than beginning with a discussion of the merits of students wearing T-shirts, the board determines that it can be most helpful by beginning with a broader policy that can help provide a context for specific decisions regarding specific dress issues. Having just read a recent issue of ON BOARD, they work to develop a “big bowl” policy.

The board first discusses the reasons why the issue of student dress is important. Several concerns, including the importance of individual expression, varying economic status of families with students in the school, self-esteem, hygiene, respect toward others, and school image emerge.

The board ultimately decides that its broadest interest regarding student dress has to do with the degree to which student appearance supports the mission and outcomes of the school. Gradually, policy 4.1 emerges: “Student dress and general appearance must support and be consistent with the mission and outcomes of St. Paul Lutheran School.”

Several members of the board feel that this policy is too broad. They fear it does not give enough direction to the principal who is responsible for developing administrative policies and practices. After further discussion, additional language is developed in order to provide greater specificity. Policy 4.1.1 results: “The school principal will not operate without a written dress code policy that is published and available to every student, parent and teacher.”

Still not satisfied, an even more specific policy, 4.1.2, is written: “Student dress codes and related administrative policies and procedures will 1) support the teaching/learning process and expectations for student achievement, 2) show respect the individuality of each student; and 3) help each student respond to God’s love by showing respect for self, for personal property, for other students and for faculty and staff members.”

The board does not develop a specific T-shirt policy. Rather, they direct the school principal, working with the faculty, to develop additional operating policies and procedures consistent with these policies. In order to monitor compliance with board’s dress policies, the principal is expected to share a copy of all relevant policies and procedures with the board prior to the start of each school year.

Bowl results

By using the policy bowl concept, the St. Paul school board accomplished several things. They engaged in a comprehensive discussion their values regarding the role of student appearance. They stayed focused on “big picture” vision and oversight. They demonstrated trust in the principal and staff. And, they established clear expectations for monitoring compliance with board policy. A winning result for all involved in school leadership at St. Paul!

For Further Discussion

Take a few minutes to review your board policy manual. Which policies are good examples of using the “policy bowl” concept? Which policies would you describe as “big bowl” policies? Small bowl policies? Do small bowl policies fit within the context of broader policy statements? In general, how specific do you think board policy should be before authority for further decisions is given to the principal or school director?

Hotchkiss provides some important insights and illustrations, including the ‘policy bowl’ concept discussed in this issue of On Board.

P.S.

Congratulations on the start of a new school year! May God bless you as you use your expertise, experience, and especially your passion for school ministry to serve children and families as you carry out your important responsibilities as a school leader.

For further study

Governance and Ministry: Rethinking Board Leadership, recently published by the Alban Institute (www.alban.org), is a must-read for anyone interested in effective governance in congregation-related ministries. Author Dan

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ON BOARD is a quarterly publication for Lutheran school boards
Writer and Editor: Richard E. Herman
Layout Design: Deb Herman
For subscription information or to share ideas, please contact the author:
Richard E. Herman, 414 Wisconsin, Unit D, Oak Park, IL 60302
(H) 708-445-9419 (W) 630-766-9066
e-mail: rickherm2@sbcglobal.net
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