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The Policy Governance Leadership Model: A Qualitative Historical Narrative Study about Bellingham School District’s Implementation of Policy Governance and the Impact on Student Success

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THE POLICY GOVERNANCE LEADERSHIP MODEL:
A QUALITATIVE HISTORICAL NARRATIVE STUDY
ABOUT BELLINGHAM SCHOOL DISTRICT’S IMPLEMENTATION OF
POLICY GOVERNANCE AND THE IMPACT ON STUDENT SUCCESS

By
Byron Keith Gerard

Accepted in Partial Completion
of the Requirements for the Degree
Doctor of Education
Doctoral Dissertation

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A Dissertation
Presented to
the Faculty of
Western Washington University

In Partial Fulfillment
Of the Requirements for the Degree
Doctor of Education

by
Byron Keith Gerard
June 2023
Abstract

Policy Governance is a leadership model developed in the 1970s by Dr. John Carver. It has been adopted by the boards and CEOs of numerous business organizations and is gaining popularity among public school superintendents and school boards. Policy Governance creates specific roles and responsibilities for the board and the superintendent, allowing them to work together toward targeted outcomes referred to as Ends. The Bellingham School District adopted Policy Governance in 2010 and has experienced qualitative and quantitative success using this governance structure. This study will provide literature research coupled with the experiences and testimonies of the current and past board members, faculty, and superintendents to connect Policy Governance to the success of students in the Bellingham community. In 2013 the Bellingham community passed a school bond providing the Bellingham superintendent with an opportunity to make strategic decisions regarding the use of those funds. Policy Governance provided the superintendent with a culture of trust with the school board that allowed him to act boldly on his convictions to invest in students who were far from equitable support in the school district. One investment was the building of Options High School, a traditional alternative school staged in portables, that was transformed into a $23 million school dedicated to each student and their personal learning needs. Options High School has experienced growth in student success since its transformation and continues to increase its influence throughout Whatcom County. This study suggests that the Policy Governance leadership model provided a culture of professional trust between the school board and superintendent and thus resulted in the increased success of students in the district.
Dedications and Acknowledgements

First and foremost, this dissertation, and the journey to a doctorate degree, is dedicated to my wife, Heather Gerard. Being raised in a faith-filled home with a Baptist minister father and a public-school principal mother, Heather vowed that she would not marry a man who was employed in full-time ministry, an educator, or who drove a truck. Heather has now been my partner through two positions serving students in ministry organizations, a 24-year career in education, and has been my faithful passenger in countless trucks that I have owned over the years. She is my beloved partner in life, and her name should be branded next to mine on this degree.

I could never appropriately thank everyone that has been important to my journey as an educational leader, and I would certainly leave out names by mistake. There are, however, several individuals who were influential in my life that must be mentioned in this dedication. My son, Caleb Gerard, and my daughter, Kaitlyn Gerard, are two amazing people who made me a better human the day that I became their father and caused me to want to be a better dad every day since. My parents, Keith and Sharon Gerard, have supported me without waiver, encouraging me, believing in me, praying for me, and at times picking up my pieces. Gary and Ruth Moen have prayerfully invested in my life personally and professionally. My late grandparents, Ronald and Vava Nichols, for seeing through my rebellious attitudes as a young man and recognizing the spark and talent that God had placed on my life.

There are also individuals who believed in me over the years, showed me grace, and trusted me with opportunities of leadership that allowed me to learn and grow into the person I am today. I am thankful for their mentoring, accountability, and friendship.
In order of encounters along my journey, I would like to thank Barb (Christensen) Crane, Mike Rima, Paul Hill, Reuben Mayes, Dr. John Armenia, Pat Larson, Julie Melver, Steve King, Steve Clarke, Dr. Greg Baker, Dr. Mike Copland, and Dr. Trevor Greene. I also need to thank the teams of educators that have accepted me over the years as their leader and have allowed me to learn from them and alongside them. My life is forever better because of the faculty of the Eastside Urban Academy, Options High School, and Yakima’s Career and College Readiness Department. I am thankful for these colleagues, but more importantly, I am blessed by their friendship.

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Chapter I: Policy Governance and the Bellingham School District

Policy Governance is a leadership framework that changes the relationship between the School Board and the superintendent. The Policy Governance model, created by John Carver, is a job designed for boards, a prescription for leadership by any governing board to enable the quality of leadership of which boards are capable. It is a model in the conceptual rather than the structural sense, created to answer these questions: How does a group of equals direct an organization so that it is successful? How can it empower those who work in the organization as much as safely possible, and how can it drive the organization toward accomplishing its long-term purpose? How can the board be crystal clear about what it should do and what should be left to others? How can it be disciplined enough to maintain a clear separation of function between its job and those of the people to whom it delegates. Furthermore, what is the difference between governance and management? (Oliver, 2009, pp. 4-5).

The Bellingham School District School Board has provided a leadership culture where the superintendent is provided with trust and operational governance of the school district. At the same time, the School Board remains steadfast in its connection to the community and its commitment to the mission and vision of the school district. Since implementing Policy Governance in Bellingham in 2010, the students in the district have experienced increased success measured by various outcomes that Policy Governance identifies as "Ends." This study examined the conditions that led Bellingham leaders to pursue the Policy Governance model, the process of implementation, lessons learned, the impact on organizational roles and responsibilities,
and the relationship to student achievement. This study also explored whether Policy Governance provided leadership conditions that led to increased student success.

**My Story: Why This Study Is Important**

I did not enter my career in education as a teacher. It was a minor miracle, likely due to the prayers of family and friends, that I graduated from high school or college. I had always felt a disconnect in school, and after graduating high school, I continued to struggle in college. I had difficulty finding my purpose in the courses I was taking, and since I had been reluctant to engage in my high school education, I had to develop new skills around how to be a learner at a college level. It was not that I could not do well in school: I did not want to. Why was school important? Since I did not have a plan for what I would do after high school, doing well in school was not a high priority. School was the same for everyone regardless of their interest in it. I suspect that the main reason that I did not drop out of high school was that I believed that there was a particular form to fill out. Today's schools are inundated with standards, graduation milestones, and exams that are gatekeepers to graduating from high school.

When I graduated from high school, I knew that I did not like high school, so why would I go to college? After working for a few years for a furniture manufacturing company, I realized I did not want that future. So, for the first time I can remember, I began looking for an opportunity that included college. I believed that attending college would provide me with a better life than working in a factory.

Even in college, I was still searching for a career pathway and struggled to see the purpose or relevance of most of my classes. It was not until I discovered an interest in working with teenagers, especially those referred to as "at-risk youth," that I changed
my college major to Behavioral Science. Then, I knew that I had found my pathway and purpose. School became interesting and relevant to me, and I knew my classes were essential to my future. It is only regrettable that I had to wait so long to find that pathway. What could my life have been like if a person, school, or program had steered me in that direction in high school?

After graduating from college, I found myself in a counselor position at a new alternative high school. I had no idea that my life was about to change forever and point in a direction that I could never have anticipated. In my mind, I had no business pursuing a career in education. I had barely survived as a student. What did I know about being a teacher or counselor? I was intrigued by the opportunity to work with at-risk students and yet was terrified to work in a high school. School was an institution where I had not found success. The school is now known as the Eastside Academy, and still supports students to this day with a similar mission and vision with which we launched it in the fall of 1996.

I had the privilege of serving students at Eastside Urban Academy for five years. During those five years, I even earned my master's degree in education and became the principal of the school. Of course, no one saw that coming either, especially me. However, I was now eager to learn how to be a leader who could run a school in a way that would change the life of students and help them find their passions and pathways.

We often faced a challenge at Eastside Urban Academy: a lack of resources. Since the school was small and not connected to a larger academic institution, like a public school, we did not have up-to-date computers, curriculum, supplies, or even an appropriate school building. The teachers often talked about what opportunities our
students would have had if we had had a modern school building to attend each day, including up-to-date computers and programs that prepared them for college or careers. Nevertheless, what would it have looked like if our school, staff, and students had the same resources that other larger or public schools had? Could we have made an even more significant impact?

Options High School, the Bellingham School District

After leaving the Eastside Urban Academy in 2001, I enjoyed several educational leadership opportunities. In the spring of 2013, I had the opportunity to return to my alternative high school beginnings when the Bellingham School District hired me as the principal of Options High School. Options High School was a typical alternative school serving around 80 students housed in seven portables. Options was located on a lot next to the district’s warehouse and behind one of the comprehensive high schools. Though I was a principal of a small alternative high school again, this time would be very different. In 2010 the Bellingham School District hired a new Superintendent, Dr. Greg Baker, who had also served as an alternative high school principal. He knew from experience the unique challenges and inequities that a school like Options High School faced. He also knew the potential of a school like Options had to change the lives of young people in the community. When Dr. Baker joined the Bellingham School District, the School Board began to adopt the Policy Governance model as their governing platform. Policy Governance is defined by its founder, John Carver (2006), “as a model of governance or framework within which to organize the thoughts, activities, structures, and relationships of governing boards” (p.30). John Carver's Policy Governance model helped the Bellingham School District Board of Directors define what their school board
would prioritize and for what the superintendent would be held accountable. Those board priorities included intentional freedom for the superintendent to implement strategies that would meet the goals and outcomes desired by the board.

The Carver Model emphasizes the role of the school board as trustworthy trustees of the organization and highlights the importance of moral ownership, not just legal and operational ownership. Additionally, the focus on policies and an intentional resistance to operational decision-making avoids micromanagement of the superintendent and prevents rubber-stamping of policies or decisions. (MacDonald, 2017)

As Dr. Baker and the school board began implementing the Policy Governance leadership model, the board's trust in Dr. Baker grew. This trust allowed him more operational influence within the school district. For example, when the school district went to the community in 2013 and asked for support for a bond to fund various facility projects, Dr. Baker supported building a new Options High School as part of the bond package. The 2013 Bellingham School District facilities bond asked voters for $160 million. The voters approved the bond, and Options High School was designated to receive $23 million to build a new 56,000-square-foot school building.

In 2017 I had the privilege of opening the doors of a new and innovative Options High School. I guided our staff through the multi-year planning and design process dedicated to students who wanted a unique and purposeful learning environment.

At a time when other school districts were closing small alternative school programs, the Bellingham School District was boldly investing in a school like Options High School. The school's enrollment tripled within the first three months of the new
building opening its doors. Students now had the option and opportunity in our community to attend a small state-of-the-art school dedicated to personalized learning and pathways. During those first few years, before the 2020 Covid-19 pandemic, the school saw a surge in enrollment and a dramatic increase in students attending the school. According to data collected from the website of the Office of Superintendent of Public Instruction (OSPI), Options High School demonstrated a 51.3% growth in the number of students graduating from high school between 2014-2019 (OSPI, 2023). The story of Options High School is an example of how facilities and resources matter to students' success. It is also an example of how trust between a school board and superintendent can provide an environment where the superintendent feels empowered to make bold and swift leadership decisions that can have a tremendous impact. This study examines Policy Governance in Bellingham; furthermore, it probes whether Policy Governance was a contributing factor in developing that superintendent and school board trust and thus providing the conditions for the building of Options High School, which has positively impacted student success in the school district.

**Background Question**

What changes can be implemented in public education governance to improve how schools support students and their success? For example, are there governance models at the highest level of school district governance that would positively impact the success of every student, especially those in the most need of equitable support?

Public education is a fundamental part of any community and the perceived success of that community. Education enables people to develop their full potential, which enables our democracy to flourish. It is about helping individuals learn and grow
and creating a successful and prosperous society (Lesley, 2021). Research in this study suggests that there are key areas that a school board and superintendent can focus on to improve the quality of education in their school district and thus strengthen the community.

Parents and community members can provide valuable insights into the needs and priorities of their children and the community at large. School boards should provide ways for the community to give input on policies. Superintendents should create opportunities for parent and community involvement, including regular meetings and forums for feedback, to ensure that they make decisions that benefit all students (Henderson & Mapp, 2002).

School boards and superintendents can also improve how schools support students and their success by prioritizing equity and inclusion in their policies and procedures. Ultimately, equity in learning is about empowering students and ensuring that each one has a fair opportunity to flourish personally and professionally through education. Moreover, at a societal level, empowering all students in this way will lead to increased economic growth and stability and stronger cultural and political foundations for successful families, communities, and institutions (Reynolds, 2020).

Finally, school boards and superintendents can improve student success by providing ongoing professional development for teachers and administrators. By investing in the professional development of educators, school boards and superintendents can improve teaching practices and ultimately enhance student outcomes (Darling-Hammond et al., 2017).
A school board and superintendent can positively impact how schools support students and their success. Change is an intentional process that takes time and trust between the school board and superintendent. Properly functioning school boards sponsor the superintendent’s leadership by setting the district’s strategic direction and monitoring the agenda for its work. Effective boards rely upon trusted professional leadership to recommend a direction and implement the board’s policy choices (Benzel & Hoover, 2015, p. 4). Policy Governance is a leadership model that can support school boards and superintendents with a structure that defines their roles and supports professional trust.

**Problem Statement**

As public education systems face increasing demands for accountability, transparency, and effectiveness, there is a growing interest in using Policy Governance as a management approach. Policy Governance is a model of governance that aims to clarify the roles and responsibilities of boards and superintendents, promote strategic thinking, and increase accountability (Carver, 2006). However, the impact of Policy Governance on student achievement remains unclear, and there is a need for research to examine the effectiveness of this approach in improving student success. Therefore, this research sought evidence of the impact of Policy Governance on students and how this approach can be effectively implemented to improve educational outcomes for students.

Many schools are struggling to meet this goal of ensuring a high-quality education for all, and challenges and changes unknown to earlier generations complicate their efforts. The reasons why public schools came into being, preparing
people for jobs and citizenship, unifying a diverse population, and promoting equity, among others, remain relevant, even urgent. Public schools reflect our values and influence our future. There are problems with public schools, to be sure. Addressing these problems will require different strategies than in the past and a national will to improve public education (Kober & Renter, 2020, p. 7).

A board governance model that has succeeded in the business sector is gaining popularity in the K-12 and higher education systems. John Carver's (2006) Policy Governance model changes traditional school boards' roles and relationships with superintendents. This governance model elevates the school board's commitment to its community while also honoring the training and experience that the superintendent brings to the leadership team.

Purpose Statement

This study aimed to learn from the Bellingham School District’s implementation of Policy Governance and identify the relationship between Policy Governance, the school board, the role of the superintendent, and the conditions that support student success. Through policy, the board trusts the superintendent to make improvements and holds them accountable for the results. This relationship is high stakes for the superintendent. It gives the superintendent greater autonomy to implement strategies they believe will result in greater student achievement. However, there are also greater risks for the superintendent in that all of these responsibilities land on them and them alone. The superintendent is evaluated on the results, not the procedures leading to the Ends. This study will provide other school district leaders with guidance for the adoption process of
Policy Governance and examples of how Policy Governance has impacted student success in the Bellingham School District.

**Significance of the Study**

This research explores the journey of Bellingham School District’s implementation of Policy Governance, lessons learned from stakeholders in Bellingham, advice for other leadership teams regarding the implementation process of Policy Governance, and evidence that Policy Governance can have an impact on student success. Interviews with current and past school board members, executive administrators, and superintendents offered guidance to other school boards and superintendents who are looking for governance structures that can positively impact students’ success in their organization.

**Research Questions**

This study was guided by the following research questions:

- How is Policy Governance different from other governance models?
- What are the essential components of Policy Governance?
- What impact has Policy Governance had on student success in Bellingham?
- What conditions led the Bellingham School District leadership to seek out a new governance model?
- What preparations were necessary for the transition?
- What lessons were learned?

**Definitions Within Policy Governance**

The Policy Governance model, created by John Carver in the mid-1970s, is a structure of governance designed for boards and the executive leader of an
organization. It is a model in the conceptual rather than the structural sense, created to answer these questions: (Carver, 2006)

- How does a group of equals, usually on behalf of someone else, direct an organization so that it is successful?
- How can it empower those who work in the organization as much as it is safely possible?
- How can it drive the organization toward accomplishing its long-term purpose?
- How can the board be crystal clear about what it should do and what should be left to others?
- How can it be disciplined enough to maintain a clear separation of function between its job and those of the people it delegates? (pp. 3-4).

Some key terms and definitions that are important to understand in Policy Governance include:

- Board of Directors: The individuals responsible as a group for setting the overall direction and policies for the organization or school district.
- Policy: A statement that guides the organization's decision-making and actions. Policies can be broad and general or more specific and focused on a particular area of the organization's operations.
- Delegation: The process of transferring responsibility and authority from the board of directors to the organization's management to implement policies and achieve the organization's goals.
• Ends: The desired outcomes or results that the organization is working to achieve. The board of directors is responsible for setting the Ends, which should be measurable and specific.

• Executive: The individual or group responsible for implementing the policies and achieving the Ends set by the board of directors.

• Executive Limitations: The board's policies restrict the executive’s actions. They define the limits of the executive’s authority and specify the procedures they must follow to make decisions.

• Monitoring: The process of evaluating the organization's progress towards achieving its Ends and ensuring that policies are being followed.

• Accountability: The obligation of the board of directors and the organization’s management is to be accountable to the organization's stakeholders, including its members, donors, and the public.

• Stakeholders: The individuals or groups that have a vested interest in the organization and its success, including members, donors, employees, and the community.

**Summary**

This study examines Policy Governance and highlights the experiences of the Bellingham School District so that other school district leaders can determine:

• Can Policy Governance better support the superintendent in their ability to increase student success in their school district, especially those students who may be farthest from success in traditional educational settings?
• Are there models of governance and conditions of leadership that better equip school boards and superintendents and can level the playing field for students?

• Is Policy Governance a structure that provides school boards and superintendents with these conditions?

Throughout this study, I have wondered what governance model was in place in the school district where I attended in 1987. What leadership conditions could have been in place that may have resulted in my educational experience being more positive, purposeful, and productive? What lessons will the readers of this study learn in support of school boards and superintendents and their effort to implement a governance structure that clearly defines their roles and focuses on the success of students?
Chapter II: Review of Literature

Governing boards have been in place in one form or another for centuries. The most well-known boards are nonprofit organizations, government agencies, and large businesses (Carver & Carver, 2001). Though some boards are in place merely for advisory purposes, most boards are volunteer or compensated individuals responsible for the ultimate well-being and oversight of the business or organization. Many large and well-known organizations exist because of a dedicated group of activists who serve on the board. Some board members were likely on staff when the organization was a small or beginning enterprise. Board members are usually intelligent and experienced persons as individuals. However, boards, as groups, are often mediocre in their actual influence on the success of a business or organization because of their lack of specific experience in that industry or organization; "Effective governance by a board of trustees is a relatively rare and unnatural act. Trustees are often little more than high-powered, well-intentioned people engaged in low-level activities" (Taylor, Chait, & Holland, 1996, p. 1).

It is not difficult to imagine what excellent board governance should look like. Most people would agree that boards should know whom they work for, they should require their organization to be effective and efficient, and they should have the power to control the organization. The type of control they exercise should empower, not strangle, the organization. They should be fair but unafraid to judge and seek to hold delegates accountable. Boards should be disciplined in their behavior and require defined roles and behaviors from their members; "as the highest authority in the
organization, board members should be predictable and trustworthy" (Carver & Carver, 2009, p. 2).

"There is one thing all boards often have in common: they often do not function" (Drucker, 1974, p. 628). Ninety-five percent (of boards) are not fully doing what they are legally, morally, and ethically supposed to do (Geneen, 1984, p. 28). Boards can be irrelevant to the organization's success if there is no governance structure guiding boards toward successful outcomes for the organization. Experienced superintendents can tell you that a board can often hinder or slow down progress if not managed well.

Superintendents are hired by and accountable to the school board. They are selected to lead the entire school system, including providing counsel and guidance to the school board (Benzel & Hoover, 2015, p. 4). It is a unique relationship between an employee and their employer.

School boards can be found in various stages of dysfunction. School boards are often composed of elected, well-intentioned community members who are not required to be experienced educators. School board members often seek a position on a school board from a desire to bring or influence change in the district. School board members are sometimes former teachers or administrators and can offer a balanced insight into the school district's governance from the Board's leadership level. Having a board of individuals with diverse professional backgrounds and skill sets is highly valuable. In my opinion, when a school board lacks experienced educators among its members, there is a risk for good intentions to be misguided by a lack of insight. Rather than the school board spending time focused on student success, financial security, and the
superintendent's performance, they can find themselves bogged down in the operational management of the school district.

In many organizations, the most dysfunctional part of the organization is the board. The members have the authority but do not know how to use it or what it is even for. Even people who are successful in their careers may seem to flounder while serving on a community board. Since the seats on nonprofit boards are unpaid, there seems to be an assumption that there needs to be no training for the job. Sometimes this assembly presides over a corporation (or school district) that profoundly impacts its community and an organization with a budget in the millions of dollars (Ballantyne, 2006).

Traditional school board governance allows boards to instruct staff by approving staff plans, such as budgets and program designs. Typically, there are four types of school board governance models, Operational, Managerial, Traditional, and Policy models:

- **Operational Models:** The Board uses its position to deliberate in making decisions, creating policies, and managing the process of where and when those policies and decisions are being implemented.
- **Managerial Models:** The school board will often separate into committees, and each member will oversee different aspects of the Board's responsibilities. Each committee is empowered to make decisions within its area of oversight.
- **Traditional Models:** The most commonly seen model of governance where a lead board member, the president, oversees the functions of the board activities and
the other board members support with their planning and oversight responsibilities.

- **Policy Model:** School boards lead the district through policy. Boards express their priorities and implement policies. Then, they make decisions within those policies. Boards separate policy from management. (Thomlinson-Wells, 2023)

**Policy Governance: The John and Miriam Carver Model**

Policy Governance is informally known in the leadership culture as the Carver Model. John Carver first developed the Policy Governance leadership model and registered the term in the 1970s. John Carver earned a bachelor’s degree in business and economics, a master’s degree in educational psychology, and a Ph.D. in Clinical Psychology from Emory University. Since the 1970s John Carver has published numerous books and hundreds of journal articles dedicated to leadership and governance. Carver set out to clearly differentiate governance and management responsibilities in organizations (Oliver, 2009). Policy Governance also identifies three primary roles for the board of directors:

1. Represent the owners, or if it is a public organization, the community.
2. Create policies that represent the values of the owners or community.
3. Monitor the organization’s performance and ensure that the organization is making reasonable progress. (Carver, 2006, p.202)

The name Policy Governance can be deceiving to its true meaning. The Policy Governance Model has less to do with actual policies and more with leadership. Policy Governance is a structure that helps define the relationship between the board of directors and the CEO or superintendent. Policy Governance moves the board from a
position of "fellowship" to one of leadership without becoming part of management. With Policy Governance, the board writes policy that says what the organization must accomplish and how it must be accomplished. Through monitoring, the Board holds the staff accountable for achieving it. With traditional governance, the Board is more focused on oversight. It relies on demanding and evaluating various management reports to ensure the staff behaves appropriately. When there is consent about how the staff is managed, traditional governance boards often resort to edicts of instruction. These edicts often bring the Board into a realm of management (Ballantyne, 2006, p. 2).

The leadership model of Policy Governance places the Board in a position where it defines what the organization must achieve and holds management to that outcome, or "End." The Board articulates the organization's required results and may outline what means will not be acceptable in achieving those end results. A Policy Governance board will provide organizational oversight by monitoring those results and means and revising policies regarding those results and means if necessary. The Policy Governance board member's job is to choose a superintendent or CEO and stay out of the way (Carver, 2006, p. 21).


1. The Board is a trustee of the organization. The Board has a moral responsibility to the owners and the organization.

2. The Board acts with one voice or not at all. Boards should work through situations until they collectively decide and speak with one voice.
3. The Board should restrict itself to making decisions through written policies and not intervene in day-to-day operations.

4. The Board should create a broad policy statement before narrowing policies around key performance indicators.

5. The Board should create policies that delegate organizational management to the CEO and respect that delegation.

6. The Board should continuously focus on the end results of the organization and should remain strategic in supporting or creating policies that achieve those outcomes.

7. The Board should implement Executive Limitations on the CEO rather than prescribe what the executive should do.

8. The Board must design its policies that align with the needs of the community and organization rather than adopt policies from other organizations.

9. The Board must establish a linkage with the CEO. The CEO must honor and feel trusted and empowered by the Board, and the Board must honor its commitments to the CEO.

10. The Board must evaluate the CEO's performance against policy criteria, not current events or data disconnected from Ends policies. (pp. 35-36)

   The tradition-blessed habit of board approvals is a poor substitute for setting criteria, then checking that they have been met. Board approvals are not proper governance but commonplace examples of boards not doing their jobs: “The problem is we are giving boards the wrong job. Stick to policy. Let your CEO [superintendent] manage. Do not rubber stamp” (Carver, 2006, p. 20). Too often, school boards can get
caught up in reviewing and approving the district's operations and lose sight of the mission of ensuring successful academic outcomes for all students. They often focus on helping the staff, lending their prestige to other organizations, rubber stamping management desires, allowing board members to be faux department heads, and ensuring staff gets the funds they want. School boards can get bogged down, micromanaging the organization, protecting lower staff from management, seeking to gain some advantage within the district, or giving board members a prestigious addition to their resumes (Carver & Carver, 2001).

Carver's Policy Governance leadership model defines the role of the school board of trustees and the superintendent in school districts. Policy Governance is a model that focuses the Board's attention on greater effectiveness in their governing role toward student success rather than district operations. Policy Governance requires school board members to understand governance in a new way and be disciplined enough to behave in a new way. School boards often adopt Policy Governance as a model of governance but will get hung up when board members are unwilling to let go of traditions or favorite projects or events. The Policy Governance model requires that boards become more competent as a group than they have been as individual members of one Board. Policy Governance boards adhere to a very strict rule that the authority of the Board resides in the Board as a body, not as a member of the Board. After sufficient debate, the Board must reach a position that everyone may not have agreed with but that no one undermines. The one voice of the Board is not the chair or president's voice but whatever the Board as a group has decided (Carver & Carver, 2009, p. 5).
The Policy Governance approach differs from the traditional board roles, it focuses on setting policies that govern the organization’s decision-making rather than managing its operations. It requires the Board to think differently about how it guides the organization, establishing clear "ends" and mission-driven policies to direct how its executives will manage the organization. The Board also establishes its performance expectations, ensuring that it is held accountable for following its expectations. Traditionally, boards have always said that they had policies, as well as other documents called "missions," "objectives," "goals," "strategies," "tactics," or "plans." In Policy Governance, "policy" simply means written statements of what the Board expects of itself or those to whom it delegates (Carver & Carver, 2009, p. 7).

**Summary: Evidence of Effectiveness**

Effective school board members can see a path forward. They understand where their district succeeds and where their district has challenges, and they have a vision for not only what a better district will look like but also how to get there (Thomlinson-Wells, 2023, p. 2). Policy Governance represents a large shift in thought and practice for most school boards. This type of change would not be valuable if the research did not show significant evidence of effectiveness and evidence that leads to student success. In Carver's (2006) book *Boards that Make a Difference* he wrote that, at the time of that third edition publishing of the book, research had not shown that boards governing through a Policy Governance model were more effective than boards that did not. However, research on John Carver's Policy Governance model does suggest that it is an effective strategy for effective boards and superintendents to work together. With Policy Governance, boards have a clear governance structure and policy development
framework, which helps them focus their attention and resources on strategic issues that directly influence the organization's performance. Policy Governance boards can be better equipped to collaborate, focus on long-term goals, and make well-informed decisions based on a thorough consideration of all relevant factors. Policy Governance directs strategic conversations that can result in innovative solutions and healthier working relationships. When boards adopt the Policy Governance model of leadership within their school district, they can have better transparency and improved decision-making (Carver & Carver, 2009, p.32). By having a set of well-defined governance policies, boards are equipped to focus their attention on organizational objectives, nurture healthy working relationships, and ensure the organization's mission is appropriately followed.

This research used qualitative data from participants closest to the Policy Governance work in the Bellingham School District to determine whether or not the Policy Governance leadership model has had a positive impact on student achievement and if it can have a positive impact on student success if adopted by other school districts and organizations. There are data to suggest that Policy Governance is an effective model for the leaders in the organization to work together within its structure. This study demonstrated that Policy Governance offers a governing structure that can result in greater student success.
Chapter III: The Rationale for a Qualitative Method of Research

"The power of a narrative is not so much that it is about life but how it interacts in life" (Merriam & Tisdell, 2016, p. 34). The current study employed a qualitative research design, using a historical narrative to present the data I collected. I selected the historical narrative design of a qualitative method of research for this study because it enhanced my ability to engage with current and former stakeholders and practitioners. A historical narrative allowed me to learn about the change process in the Bellingham School District through accounts shared by participants of their first-hand experiences and draw evidence-based conclusions about the impact that Policy Governance has had on the Bellingham School District. This study could have focused on just the quantitative student achievement data, but that would have missed out on the personal stories of how Policy Governance was adopted in Bellingham and how this model has affected the success of students in the district. In addition, the historical narrative method provides insight into the potential impact this reform model of leadership may have on other school districts looking to improve their organization through Policy Governance. It is the intent of this study that other school district leaders can learn from the experience of the Bellingham School District and bring positive change to their school district community, the governance structure, and student success.

This research draws on qualitative historical narrative research methods to gain a more detailed understanding of Policy Governance’s impact on large organizations like the Bellingham School District. This approach allows for an exploration of how the principles of Carver’s model were applied, adapted, and interacted with internal and external organizational contexts to produce outcomes that impacted student
achievement. It also allows for an examination of the perceptions of different stakeholders around the merits and drawbacks of adopting the policy governance model.

Data for this study was collected through literature and interviews with Bellingham School District stakeholders, former and current school district leaders, and former and current members of the school board. "Asking good questions is key to getting meaningful data. Interview questions can ask for experiences, opinions, feelings, knowledge, sensory, or demographic data" (Merriam & Tisdell, 2016, p.136); I conducted qualitative interviews with key personnel and stakeholders, such as executive employees, past and present board members, and the school district superintendent. These interviews explored how Policy Governance was used in practice and implemented in the Bellingham School District. In addition, document sources, such as reports, journal articles, and publications from Carver himself, helped reconstruct the development of the model over time and provided further insights into the contexts in which it was used. By exploring the role of Policy Governance in Bellingham School District's governance, it is possible to better understand this model's impact and longevity as a tool for effective school district governance. This research helps illuminate the development of the model, its successes and disadvantages, and the ways in which it shaped the governance landscape in Bellingham. This study provides valuable lessons and insights that can be applied to other school districts or organizations looking for a tool to manage policies, procedures, and governing roles within the school board and district leadership. The ultimate purpose of this study is to examine and evaluate the Policy Governance model and its potential for providing an
effective governance structure and productive leadership culture that might be replicated in other school districts and a governance model that will provide a more productive leadership culture that will in turn, result in increased student success.

**Research Design**

John Creswell is an educational researcher and author who has written extensively about qualitative research design. In his book *Qualitative Inquiry and Research Design: Choosing Among Five Approaches*, Creswell (2007) outlines five approaches to qualitative research: narrative research, phenomenology, grounded theory, ethnography, and case study. According to Creswell, each approach has unique characteristics and is suitable for different research questions. Narrative research is well-suited for studying individual experiences and stories, while grounded theory is more appropriate for analyzing social processes and uncovering underlying themes and patterns. On the other hand, phenomenology focuses on understanding the meaning and essence of lived experiences, and ethnography is concerned with studying cultural phenomena in their natural contexts (Creswell, 2007, pp. 69-102).

Creswell (2007) also emphasizes the importance of carefully considering the research questions and objectives when selecting a qualitative research design and the need to be clear and transparent about the assumptions and biases that may influence the research process. He further advocates for the use of multiple methods and sources of data in order to triangulate findings and increase the credibility and trustworthiness of the research.

Being a teacher or a school leader can be "messy work." When you work with children and families alongside other human colleagues, the work is often personal,
opinionated, and vulnerable. This study is aptly described as relying on a historical narrative qualitative research method. It recognizes those messy human relationships, seeks connections, draws clarity from its data, and fits within Creswell's five qualitative definitions:

1. Narrative Research – studies individuals and their stories.
2. Phenomenological research – studies several people who share the same experience.
3. Grounded Theory Research – studies a process, action, or interaction to develop a theory.
4. Ethnographic research – studies a group that shares the same culture.
5. Case Study Research – studies a specific event, program, or activity. (Creswell & Poth, 2018, p. 111)

Creswell (2013) writes about historical narrative qualitative research in his third edition of *Qualitative Inquiry and Research Design: Choosing Among Five Approaches*, where he defines some key features of a historical narrative qualitative research design. He writes that historical narrative research is a form of qualitative inquiry that involves the construction of a detailed, chronological account of a specific event or series of events that have occurred in the past. The approach is well-suited for answering research questions that seek to understand how and why certain events occurred and how they have shaped the present. Historical narratives are typically based on a wide range of primary and secondary sources, including documents, artifacts, and interviews with individuals who have first-hand knowledge of the events being studied (Creswell, 2013).
The historical narrative design examined the relationships, struggles, and celebrations in the Bellingham School District's journey to implement Policy Governance. A historical qualitative design approach to this research allowed more intentional opportunity to examine the narratives and experiences of the participants in this study, not just focus on the Ends data that some other research methods may rush towards. Though messy, human experiences interacting with data are a powerful tool in bringing systemic change to any system or organization.

**Theoretical Framework**

As illustrated in Chapter One, Policy Governance supports a unique relationship between the school board and the superintendent. It provides a structure that defines roles of the board and superintendent. The board actively, through policy, places its trust in the superintendent to make those improvements and holds them accountable for the results. This relationship is high stakes for the superintendent and relies on a trusting connection between the school board and the chief executive. It gives the leader greater autonomy to implement strategies and philosophies that they believe will result in greater student achievement. Schools and school districts have changed significantly in the last 200 years, yet school district governance has remained static. The profession of public education is more complex than ever before, and the stakes for students and the staff who support them have never been greater. If we genuinely expect better results from our students, staff, and schools, we need to look at making changes to the foundation of our governance structure. School boards need a new structure that provides them oversight while empowering the professionally-trained educational leader that they hired to have the capacity to bring needed change to the
systems of the school community. This study researched the journey of the Bellingham School District as leaders brought change to their community and implemented it through the Policy Governance leadership model. It also examined any impact that Policy Governance has had over the past decade on student success in Bellingham. This study involved interviews of current and past school board members, current and past executive administrators, and the superintendent, Dr. Greg Baker, who was hired as the school board began this journey and is still the superintendent at the time of this study. Using data from the Office of the Superintendent of Public Instruction (OSPI) website, this study examined student achievement data reported during the years that Policy Governance has been in place.

**Research Questions**

Policy Governance is a framework that helps organizations make better decisions by clarifying the decision-making process and the roles and responsibilities of those involved. It does this by identifying the key factors that need to be considered when making decisions and setting out a process for considering and addressing them. Questions in this study identified key factors that need to be considered when making decisions about adopting Policy Governance as a district model.

Questions addressed in this study were:

- Why did the Bellingham School District select Policy Governance as a model of governance?
- What traits does Policy Governance have that are similar or different from other school district governance models?
- What Policy Governance conditions could contribute to student success?
● What throughlines to student success can be attributed to implementing Policy Governance in Bellingham?

● What influence has Policy Governance had on past and current Strategic Plans?

● What conditions are necessary for other school districts to replicate what the Bellingham School District has managed to achieve in implementing Policy Governance?

Participants

Since this study is a historical narrative of Bellingham’s implementation of Policy Governance, the sample size of participants in this study is relatively small. There are two primary categories of participants in this study. The first is that of the board member. Data collected for this study included interviews with the current five board members in year 13 of the Policy Governance implementation process. Several former board members who were on the board when Policy Governance was first discussed and implemented were interviewed. The second category is the CEO of the district, better known as the superintendent. This study has a unique circumstance in that the current superintendent was hired at the beginning of this journey for Bellingham Schools and remained in that role through the time of this study. He was able to provide a linear experiential report regarding implementing Policy Governance, lessons learned, and the next steps in the process. A subgroup of the superintendent category was data collected from interviews with current and past executive administrators on the leadership team during the implementation of Policy Governance in Bellingham.
Setting

The setting of this study is a public school district in Bellingham, Washington. Located in northwest Washington, Bellingham is on the ancestral homelands of the Coast Salish Peoples. Bellingham is also home to three institutions of higher education: Western Washington University, Whatcom Community College, and Bellingham Technical College.

The Bellingham School District has 22 schools that serve approximately 12,000 students. It employs around 1,000 staff members in a community of 90,000 Bellingham residents. The school community is predominantly Caucasian, with 66% identifying as white; the next largest race is Hispanic/Latino, making up 17% of the district student population. Of the students enrolled, 36% qualify as low-income. About 52% of the students are male, 47% female, and 1% other. The Bellingham School District has an on-time graduation rate of 85% and an overall attendance rate of 80% (OSPI, 2023).

Instrumentation

This qualitative research method is somewhat unique, by taking a historical narrative format. The study explored Policy Governance through the story of how the Bellingham District created readiness, implemented a new governance model, and revised the process over the past decade. Interviews with those closest to the work provided narrative data to analyze and use to establish conclusions and recommendations.

Historical narrative analysis of a story can be a powerful qualitative research tool. Narrative research can uncover behaviors, feelings, and motivations that are not expressed explicitly. It also provides rich linguistic data that may shed light on various
cultural or social phenomena (Harappa, 2021). The historical narrative analysis provided this research with detailed information about the interview subjects I would not likely be able to get through other methods. Historical narrative analysis in qualitative research can also reveal hidden motivations that are not easy to perceive directly through statistical data.

**Procedures for Data Collection**

This study interviewed participants through the online video conferencing tool, Zoom, to collect this narrative data. Through Zoom, I was able to connect conveniently to subjects, provide them with links to consent information, and use the automated transcription capabilities built within the program. Subject interviews consisted of predetermined questions that guided the conversation during the interview with the intention that the questions drew out the narrative experiences, feelings, and personal impact of the subjects being interviewed (Merriam & Tisdell, 2016). Before their interview, participants were emailed a list of the interview questions they would be asked (Appendix A). This allowed them to reflect on the relevant details of the subject. Questions were asked during the interview in a conversational format. There can be several benefits to using historical narratives in qualitative research. The historical narrative analysis allows the researcher to delve deeply into the subject's experiences and perspectives, in the instant case providing me with detailed data about Policy Governance itself but also about its impact on participants' lives and careers. The narrative analysis methodology captured the complexity of the messy human experience in educational leadership.
The qualitative historical narrative allowed this study to capture each person’s individual perspective, stories, or accounts regarding the implementation and impact of Policy Governance in Bellingham. Narrative research can be a valuable tool for understanding and interpreting the perspectives of the research participants. For example, I anticipated that school board members would have a different journey and interpretation of the implementation process than the superintendent and the executive staff members interviewed.

By using interviews and the historical narrative process, this research allowed me to provide data from the perspective of the research participants rather than imposing my own experience. By examining the stories people tell about their experiences, the historical narrative allowed me to understand the context and meaning of the participants’ experiences more holistically. It also provided data that other leaders can use to bring desired change to their organizational governance.

The study involved interviews with publicly elected school board members who lived within the school district boundaries at the time of the research. Each board member serves a term of four years, after which they can run for reelection. This study also involved an interview with the former and current Bellingham School District superintendents. The public school superintendent is the school district’s highest-ranking school administrator. They are responsible for the overall operation of the schools in their district and the success of student achievement within the schools of the district. The superintendent is the only staff member hired who reports directly to the school board. The research also included interview data from executive staff members
who served in executive leadership roles within the district and reported directly to the superintendent.

**Data Analysis**

At the heart of narrative inquiry is "the ways humans experience the world" (Connelly & Clandinin, 1990, p. 2). As a research technique, this study of experiences is done through stories. Some of the stories are forms of narrative inquiry that focus more on a holistic analysis where each story is viewed as a whole, and the data within each story are interpreted in relation to the other parts of the story to develop one message or outcome (Beale, 2013, p. 694). This form of analysis tends to keep each story intact rather than analyzing categories across the stories. Other forms of narrative analysis focus more on conducting a categorical analysis whereby units or themes are abstracted from the completed stories (Merriam & Tisdell, 2016). Stories from participants may have some similarities but also clear, unique data points.

First-person accounts of the experiences of each participant formed the narrative data of this study. Each participant, though fulfilling a unique role in the experiential data, provided essential details about their experience and provided this study information from many different perspectives. One of the benefits of a historical narrative is that it opens possibilities for various applications and analytic strategies (Merriam & Tisdell, 2016, p. 232).

**Limitations of this Study**

There are several limitations to using a historical narrative design in this study. Some of the limitations are discussed by Creswell (2013).
● Limited scope. Historical narrative research tends to focus on specific events or themes and may miss an opportunity to provide a comprehensive understanding of the Policy Governance leadership model. This study focuses on the experiences of one public school district. Policy Governance may be experienced differently in other districts, states, or organizations outside public K-12 education.

● Dependence on historical records: This study focuses mainly on the stories and experiences of participants. The study also looked at publicly posted historical student achievement data to establish alignment between student success in Bellingham and the implementation of Policy Governance. Student achievement data could be interpreted as coincidental or other circumstances could have had a similar or more significant impact on the data than Policy Governance had. It would be reasonable to consider this limitation and accept that curriculum adoptions, changes in national or state policies, or even a worldwide pandemic could have impacted student achievement data.

● Difficulty in verifying accuracy: It can be challenging to verify the accuracy of historical narrative data since this researcher assumes that the stories told in the interviews are accurate. The researcher collected data from each participant and built conclusions, common themes, and recommendations from data triangulation within the individual stories.

● Potential for researcher bias: Since my experience as a school administrator was positive and contemporaneous with the time that Policy Governance was being implemented in the Bellingham School District, I am aware of the potential for
bias, and it may be difficult to avoid altogether the influence that my experiences may have on me when conducting this study and writing the conclusions and recommendations.

- Limited generalizability: Historical narratives may not represent significant trends or patterns and may not apply to other contexts. Policy Governance is not widely used in the K-12 education community. The primary source of research comes from John and Miriam Carver, and there is not a lot of other research data that can corroborate their recommendations or draw direct throughlines to student or organizational success. Thus, the extent of research available for the literature review has been more limited.

**Subject Positioning**

The concept of subject positioning is that individuals make sense of themselves or their objectives within the stories they hear or read. Depending where they see themselves in the stories or context will determine what impact the data will have on them as a reader. What sense the readers make of this study will determine what change, if any, the data will elicit in them or their behavior. A school board member may read this study with a different context than a person in a superintendent role would.

The point of qualitative research is not to study how people change during the research process but instead to gauge how people have changed as a result of what they have experienced or what change might occur in the future due to the stories and experiences of those who were studied (Merriam & Tisdell, 2016, p. 63).
Summary

This study serves as a tool for superintendents, school boards, and leadership teams to grow professionally as individuals and also support governance systems in our schools to grow towards models that are grounded in student success.

School governance is messy work. It involves the personal bias and the story of each person in the governance process. Each story in this study was viewed as a whole, and the parts within it were interpreted in relation to other parts of the story (Beale, 2013, p. 694). People and cultures have passed down their narrative data and stories for centuries. This historical narrative will pass along the stories of practitioners in Policy Governance so that other leaders can use their experiences to bring change to our organizations. This study provides an example of governance that a school board and superintendent can use to remain clear in their roles and clear in their mission to promote student success in their community.
Chapter IV: Research Results and Outcomes

Policy Governance is a board and leadership governance model that emphasizes the importance of a clear and concise set of policies in guiding an organization's decision-making and operations. It was developed by Dr. John Carver and gained popularity with the publication of his book *Boards that Make a Difference* (2006). It has since been widely adopted by the governing boards of various for-profit and nonprofit organizations throughout various industries, including public education.

The Bellingham School District, located in Bellingham, Washington, is one such organization that has adopted Policy Governance as its governance model. The school district serves over 12,000 students and is committed to providing a high-quality education that prepares students for success in college, career, and life guided by their strategic plan that the Bellingham School District calls "The Bellingham Promise."

Under the Policy Governance model, the Bellingham School Board is responsible for setting clear policies that define the district's goals, expectations of the school district, and limitations of the superintendent. The policies are designed to provide guidance to the superintendent in making decisions and implementing programs and initiatives. The Bellingham School Board has established policies covering various aspects of the district's operations, including academic standards, student discipline, budgeting, and community engagement. The policies are reviewed and revised continuously to ensure they remain relevant and effective in achieving the district's goals outlined in the Promise.

The current study highlights one of the critical benefits of Policy Governance: delineating responsibilities between the school board and the superintendent. Policy
Governance provides a structure for the elected school board to set policies to reach the Ends goals for the school district. At the same time, the superintendent and staff are responsible for implementing them, referred to in Policy Governance as the Means. This governance structure allows for a more streamlined decision-making process and ensures that everyone in the district works towards the same goals.

**Interviewed for Research**

For this research, I interviewed 10 stakeholders. I selected these individuals purposefully (Merriam & Tisdell, 2016) because they served in essential roles during the implementation of Policy Governance in Bellingham. Everyone I interviewed has had a unique experience implementing and supporting Policy Governance in Bellingham. From their interviews, I identified numerous common themes, as well as several unique individual experiences.

Dr. Ken Vedra was the Superintendent of the Bellingham School District from 2007-2009. Dr. Vedra had experienced Policy Governance in a previous superintendent position and initiated the conversation with Bellingham School Board members. He is currently retired and enjoying his role in supporting other leaders as an educational consultant. Dr. Ken Gass was a school board member who engaged in the early adoption conversations with Dr. Vedra. Dr. Gass served on the Bellingham School Board from 1997-2015. He has retired from his medical practice and is involved with several non-profit organizations throughout Whatcom County. Dr. Steve Smith is an associate accounting professor at Western Washington University and served on the Bellingham School Board from 2009-2017. Ms. Kelly Bashaw is currently a Bellingham School District Board member and has been serving in her role on the Board since
In her professional life, Ms. Bashaw is a financial aid advisor for Whatcom Community College. Dr. Greg Baker was hired as the Superintendent for the Bellingham School District in 2010 and is still serving in that role in 2023. Dr. Baker has been instrumental in developing Policy Governance from a concept to a positive Bellingham governance model. Mr. Douglas Benjamin is currently serving on the Bellingham School Board and has been a board member since 2014. Mr. Benjamin is a public health consultant in Whatcom County. Dr. Michael Copland, the Deputy Superintendent for the Bellingham School District, joined the school district in 2013. Dr. Copland was also a school principal in Bellingham. Mrs. Jacqueline Brawley is the Executive Director of Communications and Community Connections and has been with the Bellingham School District since 2013. Through her work in the organization, Mrs. Brawley plays a crucial role in telling the story of the school district and Policy Governance. Mr. Brian Rick has been with the Bellingham School District since 1991. He is currently the Director of Research and Assessment and plays a vital role in supporting the qualitative initiatives of the district with quantitative data. Dr. Rick Maloney is a governance trainer for Washington State School Directors Association (WSSDA) and consulted with the Bellingham School District School Board and leadership team from 2008-2010.

Each of these stakeholders has played an important role in Bellingham's Policy Governance implementation story. Whether writing policies, coaching, providing data, communicating the priorities to the community, or leading the entire organization through a change process, each has become an influential part of Policy Governance in Bellingham.
A Nation at Risk and No Child Left Behind

Public education and the role of the superintendent have changed dramatically. In 1983 the National Commission on Excellence in Education (NCEE) submitted the document "A Nation at Risk" to then Secretary of Education Terrell Bell. From that document, a new and intense light was pointed at public education in America. Educators were stung by the recommendations in "A Nation at Risk." Among these was the assertion that teachers knew content; however, they lacked the insight to be psychologists, counselors, policemen, diplomats, disciplinarians, referees, entertainers, and magicians, simultaneously (Fernandez, 1985). "A Nation at Risk" was a call to arms for all educators. Although the financial piece of this reform was not prescriptive, there were financial incentives from the federal government based on student achievement (NCEE, 1983).

During the years that preceded “A Nation at Risk,” district leadership was about managing budgets, buildings, and successful relationships with the neighboring community. Curriculum development was about selecting the right textbook series, and if parents and students were happy, then the school district was considered a success (Hunt, 2008). “A Nation at Risk” by comparison, contained recommendations addressing Leadership in Fiscal Support, a report which targeted the difference between management and leadership (Hunt, 2008). A substantial movement that evolved from “A Nation at Risk” was the No Child Left Behind Act, which President Bush signed in January 2002 (No Child Left Behind Act, 2002). As No Child Left Behind emerged, so did the Standards Movement, which likely had the most profound impact on school administrators as their focus shifted from school and district management to
instructional leadership, focusing on the building level, teacher activities, and student achievement (Hunt, 2008). The requirements of No Child Left Behind stated that 100% of the nation's public school students were to meet or exceed academic standards by 2014. Sanctions were tied to schools that did not meet adequate yearly progress, and a new focus was aligned to the performance of individual students and groups of students. New research in school districts posed new questions about whether or not there were links between a district leader's behaviors and the academic performance of the district as a whole (Alexander & Griffin, 1976; Byrd, 2001; Hart & Ogawa, 1987; Johnson, 1987).

Prior to No Child Left Behind, the role of the school superintendent could be described as a "generalist." Rather than focusing on specific aspects of the school system, the generalist superintendent only needed to maintain a certain level of competence in many areas (Chapman, 1997, p.31). Since 2002 the role of the superintendent position has fundamentally changed. Initially, the duties of the superintendent mainly focused on serving as a clerk to the school board, taking care of the school district's day-to-day operations. This is not the case for the modern-day superintendent. This position is now a pivotal part of how children are educated in our democratic society (Carter & Cunningham, 1997; Grogan & Andrews, 2002). In the Bellingham School District, the use of Policy Governance has positioned the school district and its leadership to meet the challenges enumerated in "A Nation at Risk" and the requirements set forth in the No Child Left Behind Act.
**Implementation of Policy Governance in Bellingham**

This research explores the Bellingham School District's implementation story of Policy Governance and, through research and interviews, describes the challenges, and benefits that Bellingham experienced along the way. In 2016 WSSDA named the Bellingham Public School Board one of 24 Boards of Distinction among the 295 Washington school boards. This recognition honors school boards that effectively use Washington State School Board Standards, promote research-based governance practices that lead to high student- and district-achievement levels, and help close the achievement gap.

In 2018 the Bellingham School District was one of only two school districts in Washington State awarded the State Auditor's Stewardship Award at the 74th annual Washington Association of School Business Officials (WASBO) conference. This recognition is given to districts that are outstanding examples of a commitment to safeguarding public resources through transparency and accountability. In recognition of his outstanding leadership, Bellingham School District Superintendent Greg Baker was named the 2020 Washington State Superintendent of the Year by the Washington Association of School Administrators (WASA). He was also awarded the 2014 Washington State Crystal Apple Award for his commitment to inclusive and transparent communications and The Bellingham Promise, the school district's strategic plan (Bellingham Schools, 2023b) The leadership team in Bellingham has been recognized numerous times for its excellence. By examining the literature and the personal testimonies of people involved in the implementation work of Policy Governance in
Bellingham, this study examines how Policy Governance contributes to that culture of excellence and how that culture evolved in the Bellingham School District.

The Bellingham School District’s journey into Policy Governance began when there was a change in superintendents in 2007. The school district had enjoyed the stability of a superintendent for 16 years. However, after his retirement, the school board found themselves in the unfamiliar territory of a superintendent search and also evaluating what their priorities were going to be for the new superintendent. At that time, the school board also recognized that their management plan for the school district did not include looking at things through an equity lens. Dr. Ken Gass, a former Bellingham School Board member, recalled that they were being forced to think differently due to the federal mandate of No Child Left Behind.

It was both very good and bad. The good part was for the first time, we were aggregating student outcomes and had data showing that our students of color were not doing as well as our white students. For the first time, the school board was seeing that, whoa, we had a lot of Hispanic middle school students in the district that were performing way below the students who attended middle school in Fairhaven.

According to the 2023 OSPI Report Card for Bellingham School District, Hispanic students account for 14% of students attending Fairhaven Middle School compared to 33% of Hispanic students attending Shuksan Middle School on the opposite side of the school district (OSPI, 2023). It was evident to the school board that all students were not achieving grade-level expectations. When I asked Dr. Gass why the school board was considering a new way of board governance, he replied, "I remember asking the
then superintendent, how do we bring more resources to the students and the schools who need them?" Part of his response was that he felt that the community would not support a differentiated approach to school resources and that differentiated funding only applied to specific populations, such as special education.

It was hard for us because, year after year, we were not moving the needle for Hispanic students or students impacted by poverty. It was challenging for the superintendent to think beyond the State and federally-supported funding formulas that encouraged equal funding resources per school building based on the enrollment of that building.

The Bellingham School Board conducted a national search for a new superintendent and selected Dr. Ken Vedra from Colorado Springs, Colorado, where he had been serving as a superintendent. During his tenure in Colorado Springs, Dr. Vedra learned about the Policy Governance leadership model through his work with other school districts and organizations and through the International Baccalaureate efforts of his school district. He encountered Policy Governance in Alberta, Canada, through working with the Provincial Board of Education and school districts in Vail, Colorado, and Las Vegas, Nevada. Dr. Vedra also attended several conferences hosted by John and Miriam Carver, the founders of the Policy Governance model and authors of numerous books regarding Policy Governance.

Dr. Vedra’s experience with Policy Governance began when he was a superintendent in Colorado Springs.

In Colorado Springs, we started doing Policy Governance, and as a result, the change in governance got the board out of the nitty-gritty operational stuff and
moved them away from day-to-day operations. Running the school district became the responsibility of the superintendent. The board started to focus on big policy things like bond elections, early childhood education, or Baccalaureate initiatives. But before the school board could move forward, they needed to write and adopt governance policies that outlined the goals or Ends of the board. Once written, it then became the superintendent's responsibility to implement actions as the operational leader.

Dr. Vedra’s experience with Policy Governance was one of the things that caught the eye of the Bellingham School Board. Dr. Gass recalls:

We picked Dr. Vedra as a change agent. We saw what he had done in Colorado with International Baccalaureate, STEM, and differentiation of schools, and that was huge for us. After we hired him, we began to learn about Policy Governance. We didn't have a clue about what it was.

During his interview, Dr. Vedra asked the Bellingham School Board, "Are you guys meddling a lot in the operations of the district?" The school board felt that they had been too involved in the operational decisions of the district and were interested in learning more about a governance model that would allow them to focus more on the goals of differentiated support that schools and students needed and less on how to provide that support. Dr. Vedra recalled:

The school board gave me the pieces I needed to support their Ends, and they moved away from interfering in the operations. The school board had been trying to move farther away from operational involvement but didn't know how. Policy Governance gave them a structure to do that. It was a new way of doing
business that allowed the schools to be run by the professional educator that the school board hired.

Dr. Gass described Dr. Vedra’s leadership in Bellingham as a 26-month booster rocket. Between 2007-2009 Dr. Vedra led the school board in numerous professional development opportunities that further informed them about Policy Governance. For example, they attended the National School Board Association Annual Conference, dedicated school board retreats to Policy Governance, and brought in consultants who helped the board match the frameworks of Policy Governance with the board's goals for the Bellingham School District.

School Board member Kelly Bashaw said that the board worked together to align Policy Governance with the priorities of the Bellingham community.

We tried to read Carver's books on Policy Governance, but I don't know how helpful they were. There was a lot of good stuff in them, but not necessarily for school boards doing Policy Governance, so we had trainers, like Dr. Rick Maloney, come in and help us adopt Policy Governance.

Several of Bellingham's school board members mentioned that attending professional development together as a board helped them understand the benefits of Policy Governance and the implementation process that would be necessary. As a result, they would attend some sessions together and, at other times, attend sessions separately and then report back to one another. Dr. Gass believes that two beneficial events were the WSSDA meetings and the National School Board Association Conferences.
You can't just read a book; it's not cookie-cutter. The policies must be very individual for your community and the size of your district. We're not content experts in education. So, you either fake yourself into thinking that you are an expert, or you just rubber stamp the superintendent's actions, or you work together with the administration and the superintendent to craft policies that we feel good about and that meet the needs of the public.

In October 2009, Dr. Ken Vedra left the Bellingham School District for a leadership position overseas. Selecting a superintendent mid-school year is extremely difficult, so the school board named the then-Executive Director of School Administration, Sherrie Brown, as the interim superintendent while the board conducted a national search for a new superintendent. During those nine months, the school board continued to discuss Policy Governance. It incubated any transition plans that may have been started in hopes that they would launch the new governance model with the new superintendent. Dr. Gass said that the board recognized that they were having problems with management issues and were not looking at the management of the district through an equity lens. Therefore, the Bellingham School Board set out in search of a new leader who would lead with a differentiated equity mindset and be willing to adopt a Policy Governance relationship with the school board.

The Bellingham School District school board selected Harvard graduate Dr. Greg Baker as the new superintendent in June 2010. Dr. Baker had also served as an educational leader in Spokane, Washington, and Portland, Oregon, but had not experienced Policy Governance in his previous roles.
When he was hired in Bellingham, Dr. Baker said, "I had never heard of John Carver’s Policy Governance model, so when they asked me about it, I talked about the school board and superintendent relationship." However, Greg Baker first met with Policy Governance consultant Dr. Rick Maloney to understand what he and the school board were getting into. Dr. Maloney recalled his introduction to the Bellingham School District’s new superintendent:

In 2010 Dr. Ken Gass asked me to meet with Dr. Greg Baker, who had just been offered the position of Superintendent in Bellingham. We met at a Starbucks off of I-5, and I gave him a pencil sketch of what Policy Governance was. Dr. Vedra was only the Superintendent in Bellingham for two years, and the Bellingham School District School Board was looking for some operational changes on the board from how the previous superintendent of 16 years had operated. Dr. Vedra brought to the board a new Policy Governance language that was the difference that they were looking for, and they now had the leader in place to change that relationship between the school board and the superintendent.

After meeting with Dr. Maloney, the new superintendent, Dr. Greg Baker, began a personal steep learning curve to understand what Policy Governance was. The first thing he focused on was understanding exactly what everyone was talking about. Dr. Baker stated that it was difficult to fully understand everything involved in Policy Governance until they had gone through it for a few years.

**The Bellingham Promise**

Several stakeholders refer to "The Promise" in this research numerous times. The Promise is not part of the Policy Governance model; however, it has become a key
strategy in carrying out the Means and Ends of the school district and is a primary tool in communicating to the school district staff, students, and the community what the priorities of the school board and school district are. Brian Rick says, "It is hard for me to separate Policy Governance from the Bellingham Promise. The outcomes of the Promise have developed in line with the Ends outcomes for students that have been identified in the policy." The Bellingham Promise is what other school districts would call their strategic plan (see Appendix B).

When Dr. Greg Baker arrived in Bellingham as the new superintendent in 2010, he began to develop a new strategic plan for the school district that would come to be known as The Bellingham Promise. In January 2012, a first draft of the strategic plan was shared with all district staff and members of student and parent advisory committees, the Bellingham School District Foundation members, labor association leaders, and several other parent and community groups. Thousands of comments were collected through an online survey, and themes were identified that began to build The Promise (Bellingham Schools, 2023b).

The Bellingham Promise directly reflects the School Board's Policy Governance policies and is used strategically to guide the desired outcomes for students in the school district. Unlike strategic plans in many other school districts, the Bellingham Promise does not have an expiration date. It is a living document continuously updated and improved based on feedback from community, parent, student, and staff stakeholders. The priorities in The Bellingham Promise drive the district's budgeting process and require the continual collection of evidence emphasizing the whole child outcomes. The Bellingham Promise communicates as vision, mission, and core beliefs
of the district. The Promise also communicates Outcomes tied to Policy Governance Ends and Key Strategies that the school and district leaders will use to accomplish those outcomes. Both the Board policies and The Bellingham Promise are in sync with one another. For example, in The Bellingham Promise, in part, the Knowledge Outcomes state that "we will develop students and graduates who are readers, writers, scientists, and mathematicians..." School Board Policy E-2 (Appendix C) is titled Outcomes Focused on Knowledge. The policy reads, "Bellingham Public Schools is committed to developing students and graduates who are readers, writers, scientists, and mathematicians..." These Promise Outcomes are found in step throughout the Policy Governance Board policies. That is why it is important to know the relationship of The Promise to the Policy Governance story in the Bellingham School District and why stakeholders mention it. The Bellingham Promise is used as a communications tool to share the messaging and priorities of the school district to the community. This communication of the work that is being accomplished is a strength of the Policy Governance model.

Several Policy Governance themes emerged as I collected data from interviews and literature. In addition, stakeholders had individual experiences and perspectives on how Policy Governance came to be adopted in Bellingham. This chapter will highlight implementation experiences in five Policy Governance policy categories.

- Policies: Rewriting governance policies.
- Policies: Relationship between the school board and the superintendent.
- Policies: Ends (outcomes).
- Policies: Executive Limitations.
Policies: Operational (means).

**Policies: Rewriting Governance Policies**

How can a group of equals direct an organization so that it is successful? How can they empower those who work in the organization, and how can they drive an organization toward accomplishing its long-term purpose? How can the board be crystal clear about what it should do and what should be left to others? (Carver & Carver, 2009 p. 3-4). When you get right down to it, it is the difference between governance and management. The reason that school districts have a board at all is so that there can be accountability of the organization (p.4). The Policy Governance board acts consciously on behalf of the community and spends a considerable amount of time connecting to them and understanding their diversity. The responsible school board adheres to a strict rule that the authority of the board resides in the board as a body, not in members of the board. A board member does not have one-ninth the authority: they have none of it, while the board has all of it. Policy Governance requires the board, after sufficient debate, to reach a position that everyone may not agree with but that no one undermines (p. 5).

The board sets "board means." These are the policies that describe the board's job and how it directs the superintendent to achieve the "ends." These also are referred to as the governance process (Bellingham Schools, 2023h). The board must clearly set out its expectations of success and who is responsible for meeting those expectations. When Policy Governance boards set expectations of themselves or the superintendent, they use specifically designed principles called "policies" (Carver & Carver, 2009 p. 6-7). Traditionally-governed boards have policies and other documents called "missions,
objectives, goals, strategies, tactics, or plans;" in Policy Governance, the word Policy Governance simply means written statements of what the board expects of itself or those to whom it delegates (p. 7).

Dr. Gass reflected that transitioning to a Policy Governance model “took hours of work outside of our normal board work;” but in October 2010, the Bellingham school board began to pass Policy Governance policies. Dr. Gass recalls that they were far from perfect, “but we honed and pruned them throughout two to three years.”

When Dr. Greg Baker was asked about what efforts were necessary to begin implementing Policy Governance, he said,

We had to rewrite policies, write new policies, and we also borrowed a lot of policies from other school districts. We started to look at the administrative policies from the Washington State School Director Association (WSSDA), and a huge body of work was looking at all of those policies and laws and assessing whether or not they were required of us with legal reasoning or if they were just written that way by WSSDA out of preference? Some policies we just had to tweak a little and define whether it was under the responsibility of the board or superintendent. For some of the policies, we changed the language to Executive Limitations so to say that the superintendent will not act in a certain way or do something in a certain way. We were able to eliminate some policies because they were preferred and not required of us by law. This is still ongoing work, and it is huge.

The School Board had made a mind shift from their prior leadership paradigm and prioritized the focus on outcomes, Ends, and how to hold the superintendent
accountable for those outcomes. That is what Policy Governance brought to the Bellingham School Board. Dr. Mike Copland assisted with the transition and rewriting of board policies:

The school board became far less focused on the means associated with getting to the outcomes and much more focused on analysis and decision-making based on the evidence presented about the progress toward those outcomes. This then dictated the board's decision to continue employing the superintendent.

Steve Smith, a school board member from 2009-2017, recalled being involved in rewriting the district's policies.

As a board member, I was involved in those early years in rewriting all of our policies. I think there were 46 at the time, and after I left the board eight years later, we cut the number of governing policies in half and reduced the wording in each policy by a fourth. I remember a quote that said Policy Governance without goal-oriented oversight is worse than both. In some respects, that was a frustration of mine in those early years on the school board. We wrote policies and used benchmarks from comparable school districts; however, some of our data did not compare to these other districts. We wrote policies that established benchmarks for the superintendent to achieve that were too high. Some were outrageous and could never be met, and each year Dr. Baker didn't meet the goal, but we gave him a thumbs up. I don't think that is how Policy Governance is supposed to run. I continuously pushed for us to establish policies and Ends that were smaller and achievable. Then you can hold the superintendent accountable. I do think Policy Governance is the way to go. It is a way to get the best out of
people. If people can have a level of autonomy and it gives them pride in their work, then they will take ownership of that work. I do believe that if we had not had a superintendent like Dr. Baker, who was working their tail off to move things forward, then Policy Governance would have likely crashed and burned quickly. It survives today because of a great superintendent.

In the article "8 Lessons in 19 Years—Part 1," by Dr. Rick Maloney (2020a), he writes that school districts adopting Policy Governance should not assume that all innovation is good:

I used to think that enthusiasm is good because it excites and gives us a surge in energy. But following that surge, like a sugar high, we can expect a letdown. Carver advocates in Reinventing Your Board that school boards operate with one active policy set. We learned early on to ignore our entire 300+ pages of traditional board policies and instead focused on 30+ pages of Policy Governance policies. As a result, we handed over that previous policy set to the superintendent, with expectations that they would rewrite or eliminate them as appropriate. Some old policies were important in providing instructions to the board for conducting board business. (p. 2)

Jackie Brawley is the Executive Director of Communications and Community Relations for Bellingham School District. Working with the superintendent to write and rewrite policies falls within her department and her role.

Not all districts do it this way, through the communications department. Some districts have a person who is separately in charge of policies. Many times, the Human Resources department manages district policies. If someone has
questions about a policy, our department will assess whether it is a policy
governed by the school board or by the superintendent. We will assess what the
law may say about it, and it is my responsibility to take it to the superintendent to
get his response. He then determines if the policy is determined by WAC or RCW
or if it is monitored and approved by the board or superintendent. When I meet
with Dr. Baker, I bring my stack of questions about policies or new policies being
presented by WSSDA. We will discuss the rationale, and he will determine if this
is a policy or procedural means. We regularly monitor the legal updates coming
from WSSDA, and then we will make recommendations as to how they translate
to Policy Governance.

The early work of the Bellingham School Board and Superintendent was
establishing new policies that clearly articulated the Ends desired by the board. From
there, Kelly Bashaw, the board, and the superintendent worked together to write or
rewrite policies that clarified the board's means of acting as a board and operational
means that guide the superintendent and school district staff. Kelly said,

If you didn't have a heart for kids and schools, you probably wouldn't be
interested in being a school board member. Policy Governance keeps us out of
the superintendent's office and trying to meddle in whatever they are doing. It
helps us be better board members and focus on taking care of the
superintendent.

Currently, the school board has 11 different Governance Policies (GPs). The
categories of these policies are:

- GP-1 Governance Commitment and Beliefs (see Appendix D)
Boards spend a huge amount of time exploring, mandating, and criticizing activities but are often rather unclear about the reason for all the activities (Carver & Carver, 2009, p. 9). Dr. Steve Smith also felt that at times the school board can lose clarity on how policies impact the classroom, and Policy Governance helps keep the school board in their role and the superintendent supported in his.

The work is massive. You put the decisions in the hands of the experts. Elected school board members are from all walks of life, and they all come with their personal biases, yet they are not steeped in the work like teachers are. It would be naive to walk into my home and tell the plumber how to do his job. Schools are funny because we’ve all been to 12 years of school, and we are expected to think that we are the experts. I’ve been watching movies for more than 12 years, and that doesn't make me an actor. Because I sat in a classroom for 12 years does not make me a teacher.
Policies: Relationship Between the School Board and the Superintendent

The school board/superintendent relationship defines the connection between the board and the superintendent, directs the board to act as a unit, creates accountability of the superintendent, delegates to the superintendent, and monitors superintendent performance. The Bellingham School Board has developed five policies to govern the relationships between the board and superintendent.

- B/SR-1 Board / Superintendent Connection (Appendix E)
- B/SR-2 Delegation to the Superintendent
- B/SR-3 Superintendent Evaluation
  - B/SR-3.1 Annual Summative Evaluation of the Superintendent
  - B/SR-3.1.1 Monitoring Response Form (Bellingham Schools, 2023d)

The board’s sole connection to the operations of the district is through the superintendent. Only the board’s carried motions are binding on the superintendent. All authority and accountability for district employees are under the purview of the superintendent and not the board (Bellingham Schools, 2023d). Rick Maloney (2020a) reflected on the nature of the work the board should embrace:

“I used to think that the Policy Governance difference was that we changed our approach to board work. It certainly did that, but before we can effectively use this new approach to the board’s job, we must change our mindset about the nature and purpose of board work, the role of the executive (superintendent), the purpose of monitoring, and many other things. (p.2)

Policy Governance addresses the strategic plan issues by breaking down traditional strategic planning into board-reserved and superintendent-delegated...
business. The board documents its model-consistent strategic goals/values/priorities in ends and means policies. It leaves operational decision-making to the CEO, who is now unencumbered by an action plan written by a stakeholder committee made up of traditional strategic planning methodology. Now the CEO (superintendent) has the authority needed to manage timely operations.

Through monitoring of ends and means policies, the board retains overall control (from a policy perspective) over both strategic and operational work but avoids perpetuating the false notion that it is making or approving operational plans about tasks (the means) needed to run the organization. It guides those decisions, not by action plans, but through values written in the Executive Limits policy (Maloney, 2020b, p. 2).

The school board was far less focused on the means associated with getting the outcomes and much more focused on analysis and decision-making based on the evidence presented about the progress in the system that then dictated the board’s decision to continue to employ the superintendent. Policy Governance strips away board involvement in the day-to-day leadership of the system and invests in the superintendent and his leadership team.

Dr. Greg Baker believes that Policy Governance respects him as a trained educational leader. However, there is also risk involved for the superintendent under Policy Governance.

The philosophy is, I'm the expert educator, and the board stays at a high level of policy and doesn't get into the weeds. It's my job on the line, so you have to be really careful of how you are evaluated within Policy Governance. I do feel a sense of empowerment to be able to make educational decisions at a level that
I've never seen before in other districts. I don't have to go before the board for a vote to implement full-day kindergarten, math adoptions, change class sizes, or decide on bargaining agreements. I keep the board highly informed, but I don't need to constantly seek permission.

Board member Kelly Bashaw also believes that Policy Governance appropriately defines the roles and relationship of the board member and the superintendent. When you get the means off of the board's plate, that then allows the board to focus on desired outcomes of the school district. It sharpens the board's focus on student outcomes, and almost everything else the board does is related to that. If you didn't have a heart that cared about all of the operational things in the district, you probably wouldn't have been interested in being a school board member. Policy Governance gives support to the leadership team and the experts and gets the school board out of their way.

According to Bellingham's Board B/SR-1 (2023d), policies addressing the relationship between the school board and the superintendent, it is explicit that the responsibilities of the school board are for:

- Hiring the superintendent.
- Monitoring the superintendent's performance in meeting district goals found in Ends policies.
- Monitoring the superintendent's compliance with the Executive Limitation policies.
- Preparing the superintendent's annual evaluation.
- Reviewing the superintendent's employment contract.
The policy goes on to say in B/SR-1.4 that the board or individual members of the board will never give instructions to persons who report directly or indirectly to the superintendent (Bellingham Schools, 2023d).

**Policies: Ends (Outcomes)**

Ends are the most critical of all policy areas within Policy Governance. Ends are concerned with what human needs are to be satisfied, for whom, and at what cost. Ends are about what the organization is for, not about what it does (Carver, 2006, p.48). The Bellingham School District describes “Ends” in their policy as the results the school board expects. The school board creates policies that define the "ends." In this way, the board provides strategic leadership by clearly defining what is to be accomplished. The Bellingham School Board has established four Ends policies.

- **E-1** Strategic Mission and Vision (Appendix F)
- **E-2** Outcomes Focused on Knowledge
  - E-2.1 Student Competence
- **E-3** Outcomes Focused on Character and Action (Bellingham Schools, 2023e)

Carver explains Ends as policies that address a threefold concept: the school district's results, recipients, and costs of results. School boards should not mistakenly equate Ends with results. The concept of an End outcome is broader than a result. School boards are sometimes tempted to define an End as anything that is important, required by law, or at the end of a process. Ends are not programs, services, or curricula. Those things are Means (Carver, 2006, p.152).

The most challenging part of our policies, and providing evidence for the policies, is that we do not have standardized or public measures for common measures. For
example, it is easier to find evidence that Smarter Balance provides that students are mathematicians or scientists (E2). However, finding evidence that our students will be confident individuals who continually challenge themselves (E3) is much more difficult. Policy Governance compels us to find evidence for our school board so that we can provide accountability for our outcomes.

Mr. Brian Rick is essential to Bellingham’s executive team. He is often responsible for making sense of End policies by providing evidence to support those outcomes.

Finding evidence can be really difficult at times. Sometimes our interpretation of the evidence is challenging because of the lack of quantitative data. That is where qualitative storytelling is valuable. Policy Governance has really helped us demonstrate accountability for outcomes that are really hard to quantifiably measure.

At the beginning of the implementation process, Bellingham took many policies from other Policy Governance school districts and considered them as starting points for their own Policy Governance policies. From there, the team made annual adjustments to policies and reviewed them every year and continued to refine them. The superintendent, Dr. Baker, leads the school board and executive team through that work. Dr. Baker said,

Sometimes we’ve added our own, like the EL10, the equity and diversity policy. We’ve also added one on sustainability. So the board can choose to emphasize areas that were not originally in the policy. At the beginning of our Policy Governance adoption, the board was highly involved in the Ends policies around
vision, mission, and core values. I helped facilitate a lot of that work, but the board owned it. We had a lot of meetings to debate the language of the Promise of the vision, mission, core values, and their outcomes. We debated for hours about every word. I feel like we have been able to be bold about some things, and if it wasn't for Policy Governance, we may not have had the chance or would have been forced to move much slower and potentially become mired in politics.

A large part of Policy Governance is the monitoring reports provided by the superintendent and their team to the school board, providing evidence of meeting the outcomes established by the board.

A lesson that we have learned over the years is that our monitoring cycle is not only an instrument of accountability, it also serves as an agent of change, improving board practice even while targeting organizational performance. Rigorous monitoring and then requiring or making small tweaks in response to monitoring reinforces the value of continuously becoming a better board.

(Maloney, 2020b)

Monitoring is the only way that the school board will be able to know whether the superintendent is achieving the Ends that have been put in place by Board policies (Oliver, 2009, p.139). Bellingham Public School executive staff, led by Deputy Superintendent Dr. Mike Copland, write a series of Ends reports each year that are focused on the Ends outcomes and tied to the Bellingham Promise strategic plan. Dr. Copland said,

We write these Ends reports that are focused on the outcomes of The Bellingham Promise and are tightly governed by board policy Ends. Ends policies
tend to deal with student outcomes, so we write reports on student attainment, student proficiency, growth in academic areas, graduation rates, and post-secondary college entrance rates. Each year the staff writes a comprehensive report for the board that focuses on all 17 of The Promise/strategic plan outcomes. In that Ends report, the staff includes data that is both qualitative and quantitative. The report includes stories about students who have experienced a particular kind of progress in the system related to the outcomes, and the report also attempts to show big-picture data about student, staff, and community perception of how the district is doing. Those reports become the basis for the school board’s evaluation of the superintendent. Having these reports to the board each year is a good accountability mechanism. The executive team and the superintendent highlight areas that have seen success and other areas where growth is needed. That then drives the work back into the system, back into the means of what is needed to make improvements. While staging out of the means, the school board communicates to the superintendent, "We’re not going to tell you how to fix this, but based on what we see here, we expect you to fix it."

A traditional governance board may get into a process of reviewing curriculum or involved in principal changes to bring improvement. However, the Policy Governance board does not engage in that level of activity. Instead, the school board communicates the expectation around the outcomes, and the superintendent is held accountable to improve those outcomes however they deem fit. If the superintendent fails to figure out a way to meet the board's expectations, it is their job on the line.
**Policies: Executive Limitations**

The superintendent is not free to decide how to accomplish the Ends. "Executive limitations" are policies that define what methods *cannot* be used to get the expected results. The school board is pre-approving all means that have not been expressly prohibited. This gives the superintendent the power to make decisions that create the desired ends. The Bellingham School Board has established 11 policies to limit the actions of the superintendent.

- EL-1 Expectations of the Superintendent (Appendix G)
- EL-2 Organizational Continuity
- EL-3 Treatment and Communication with the Public, Parents, and Students
- EL-4 Staff Treatment, Compensation, and Evaluation
- EL-5 Communication and Counsel to the Board
- EL-6 Academic Standards and Practices
- EL-7 Budget Planning and Execution
- EL-8 District Calendar
- EL-9 Asset Maintenance and Protection
  - EL-9.1 Facility Improvement or Development Involving Bond Measure Proposal
- EL-10 Race and Equity (Bellingham Schools, 2023f)

The action of telling the superintendent what *not* to do, rather than what to do, is a proscriptive, not prescriptive, element of Policy Governance called Executive Limitations. These "ELs" spell out in the board's policies what limits will be placed on the superintendent (Carver & Carver, 2009, p.13). By design, Policy Governance provides
the superintendent with vast autonomy in procedural actions. Executive Limitations clarify what choices of the superintendent will be out of bounds. The benefit of Executive Limitations is that it is a system for preapproval that eliminates the need for the school board to be involved in ongoing operational decision-making. Functioning Policy Governance Boards do not engage in approvals for operational issues except those required by state or federal laws or regulations or accreditation agencies. Policy Governance requires that school boards create policies that tell the superintendent, "don't let this occur." Policies worded in a "don't let this occur" fashion may feel quite unnatural and sometimes even verbally awkward. Yet many matters of law or other regulation are in this form. We are not normally told how fast to drive, but how fast not to drive (p.14).

In Bellingham School District policies, the Executive Limitations language takes the form of "the superintendent shall not allow, or the superintendent shall not fail to." The example of Executive Limitation (EL) 2 reads, "The superintendent shall not fail to ensure that non-employee stakeholders are treated with respect and dignity throughout the organization and are provided with communications regarding district events, plans, and actions."

The Bellingham Public School Board and leadership team work together to publish a School Board Handbook (2023j). This tool is made available to all current board members, new board members, or prospective community members considering running for school board election. The Executive Limitations section states that the board monitors the superintendent's adherence to the Executive Limitations through annual reports to the board. After each EL monitoring report, the board reviews and
comments on the superintendent's adherence to the established policy limitations, which becomes part of the superintendent's annual evaluation. After each report, it reviews its Executive Limitations policies and determines if modifications are necessary. Tightening or loosening control over the superintendent could impact the superintendent's ability to take specific actions (School Board Handbook, 2023j, p.5). There must be a high level of trust between the board and the superintendent for this system of self-reporting compliance to be effective. If trust is lacking, the board may require outside verification of compliance (p. 6).

Dr. Greg Baker points out that one of the benefits of Policy Governance is the ongoing review of policy and the evaluation of the superintendent. That work does not land all at once in the year.

We have ten Executive Limitations currently in Bellingham, but I think it is open to any Policy Governance board to determine the number of EL policies. The Bellingham School Board reviews one Executive Limitation each month. Each month the school board completes that part of my evaluation. That is atypical of traditional boards where the superintendent gets an end-of-year evaluation in June. My evaluation grows throughout the year.

Ends and Executive Limitations policies are continuously reviewed and revised by the board. A lot of work goes into the language used, and there is different expectation language for Ends and ELs. The school board has struggled at times with the language of its policies. Having a strong communication plan is essential to Policy Governance. In Bellingham, Jackie Brawley works closely with the superintendent to
create plans for sharing evidence, successes, explanations, and when to give
quantitative and when to provide qualitative data.

I will sometimes flag things to examine. I understand why it was written this way
10 years ago, but we are now falling short, not because we are not doing a good
job, but because of the way that the policy is worded. ELs are fascinating and
interesting because we are trying to figure out how far to take the explanation of
our evidence, but it is also at the board’s discretion. Sometimes the board will ask
for more data or different data and, while supporting the board, we at times need
to point out that the policy isn't written that way.

Bashaw adds that there should be no “gotchas” in the superintendent's
evaluation on Ends or Executive Limitations.

There are times when the superintendent can't control what happens in a school
environment, like being impacted by Covid. I heard someone equate it to a
tornado. “You can't prevent the tornado or even someone's readiness for the
tornado, but you can evaluate their recovery from the tornado.” So sometimes,
the board makes changes to what we require in the policies.

Policy Governance allows for evolution through its continual monitoring
framework. It allows for change and a way to understand new, current, and past
practices. Dr. Vedra says that Policy Governance allows the school board to be forward-
thinking and innovative. “Most often, traditional governance is only rooted in past
practice.” Maloney (2020c) explains that some boards can get caught up monitoring
staff means so relentlessly and in such detail that it undermines the superintendent's
freedom to interpret policy. The board obsesses not about the Ends but about the
means. It ignores its own policies about how it will honor any reasonable superintendent
decision. It obsesses over details in staff means monitoring reports and constantly
redrawing its policy lines. In effect, they use Policy Governance as a way to
micromanage and consequently fail to monitor the ends.

Dr. Greg Baker likes the fact that Policy Governance and the Executive
Limitations policies have allowed his team in Bellingham to move more quickly and
boldly than they could potentially have in a traditional governance structure.

We were able to make good decisions and, many times, protected the school
board from political elements of hard decisions. Policy Governance put those
decisions on me. Policy Governance is empowering in that it treats me like a
professional.

**Policies: Operational (Means of Operating as a Board)**

Under a policy governance model, the superintendent sets administrative policies
that describe how the school district operates and are referred to in Policy Governance
as Means. Bellingham's means or operational policies are identified in their policy
section 1310 (Bellingham Schools, 2016). However, some operational policies related to
the operation of the board of directors are legally required and are not covered by
governance policies (Bellingham Schools, 2023c). Operational policies are traditionally
known as "school board policies" in traditional governance school districts. These
procedural policies direct the district staff on how to act and respond to the issues or
activities of the school district. Policy Governance Operational Policies refer to how the
board operates amongst each other and in response to activities of district business.
These policies are typically defined in Washington State RCW law. An example is Policy
1630, the Evaluation of the Superintendent (Bellingham Schools, 2016). This policy is framed in the board's Policy Governance by RCW 28A.400.010, which defines the employment of a Superintendent of Schools in the State of Washington. This section of the policy should not be confused with the Means policies delegated operationally to the superintendent for daily operations of the school district. The Bellingham School District currently has 26 policies that direct the school board's actions in governance. They are the School Board's guide through numerous common topics and circumstances in school district governance.

- 1000 Policy – Legal Status and Operation (Appendix H)
- 1110 Policy – Election
  - 1110 Procedure – Election
- 1111 Policy – Oath of Office
- 1112 Policy – Director Orientation
- 1113 Policy – Board Member Residency
- 1114 Policy – Board Member Resignation
  - 1114 Procedure – Board Member Resignation and Vacancy
- 1210 Policy – Annual Organizational Meeting, Election of Officers
- 1220 Policy – Board Officers and Duties of Board Members
- 1225 Policy – School Director Legislative Program
- 1240 Policy – Committees
- 1260 Policy – Board of Directors School Site Adoption
- 1310 Policy – Policy Adoption, Manuals, and Administrative Procedures
- 1320 Policy – Suspension of a Policy
● 1330 Policy – Administration in the Absence of Policy or Procedure

● 1400 Policy – Meeting Conduct, Order of Business, and Quorum
  ○ 1400 Procedure – Meeting Conduct, Order of Business, and Quorum

● 1410 Policy – Executive or Closed Sessions

● 1420 Policy – Proposed Agenda and Consent

● 1440 Policy – Minutes

● 1450 Policy – Absence of a Board Member

● 1610 Policy – Conflicts of Interest 1st Class Districts

● 1620 Policy – The Board-Superintendent Relationship
  ○ 1620 Procedure – Board-Staff Communications

● 1630 Policy – Evaluation of the Superintendent

● 1732 Policy – Board Members Insurance

● 1805 Policy – Open Government Training

● 1822 Policy – Training and Development for Board Members

● 1830 Policy – Participation in School Boards' Association (Bellingham Schools, 2023i).

The Policy Governance model defines Means as any organizational issue that are not Ends. The term is not simply synonymous with methods. However, it includes methods, practices, situations, circumstances, activities, and any organizational aspect that does not directly define results, recipients of results, or the cost or relative worth of those results. The board's job of governing, along with procedures and practices, are board mean issues. The board’s policies about its own means are instructive not to the superintendent but to the board itself (Carver, 2006, p.21).
School Board member Douglas Benjamin emphasizes the need for school board members to manage their fellow board members in Policy Governance. “Board members must be willing to say to one another, ‘look, you can't do it that way, and here are the reasons why.’” A traditional governance board process might have an activist board member who wants to get involved in hiring principals or reviewing math curricula. Policy Governance boards do not engage in that level of activity.

Kelly Bashaw believes that the health of the school board can be an indicator of the overall health of a school district.

We are elected board members, and some past board members wanted to get into the weeds. You have to pay attention to who is getting on your school boards. It is our responsibility as board members to educate other board members. If you don't have a functional board and your district is having difficulties, then it is important that our personal agendas don't take priority over the work we were elected to do.

**Summary**

Policy Governance is the difference between governance and management. Policy Governance boards act consciously on behalf of the owners and the community. They are very strict in their governance rules as a body, not as an individual board member. If you are a five-member board, you do not have one-fifth of the authority; you have none of it. The board, as one voice, has all of the authority. Policy Governance requires the board to debate and move forward with one voice (Carver & Carver, 2009, p.4-5). Even considering many of the questions or concerns that people may have about Policy Governance, Dr. Steve Smith believes that it is the best model of
governance if school boards believe that they have hired a good superintendent to lead the district. “It just felt like a healthier way for us to pursue the governance of the school district. We are not the educational experts.”

Before a school board can change its approach to the board's work, they have to change the collective mindset about the nature and purpose of the board's work, the role of the superintendent, the purpose of monitoring, and the board's authority (Maloney, 2020a, p. 2). In 2007 the Bellingham School District's Board of Directors set out to do just that. They made intentional investments in each other through professional development opportunities. Once a new superintendent was hired in 2010, they intentionally invested in his leadership and understanding of the roles of people and management within Policy Governance. Because of this shift to Policy Governance, the board can focus on larger issues, delegate authority to the superintendent without interference, and continuously evaluate what is being accomplished in the school district. (Bellingham Schools, 2023h).
Chapter V: Conclusions and Recommendations

Summary of Findings

OSPI Data.

This historical narrative research answered this study's first and paramount question: What changes can be implemented in public education governance to improve how schools support students and their success? The Bellingham School District implemented a new governance structure in 2010, adopting Policy Governance to guide their policy and operational decision-making. The success data attributed to Policy Governance during the past 13 years is qualitative and quantitative. Therefore, it is difficult to attribute the success directly to the Policy Governance model. However, this study does show that Policy Governance created conditions that allowed the superintendent to act with expertise. As reflected in Appendix I, students' success can be measured over time and over a corresponding span of time when Policy Governance guided the board and superintendent (Bellingham Schools, 2022).

Quantitatively, there were small margins of growth over time between 2014-2019, as reported online by OSPI as the Bellingham School District Report Card shows in recognition of the disruption of Covid to the education system worldwide, this study did not include data from 2019-2023. Due to school shutdowns and remote learning, many categories were not reported on by the State of Washington in 2019. Between 2014-2019 English scores determined by the State Smarter Balance standardized test increased by 6.35% overall. Math scores declined by 12.21%. Other data reported on the State Report Card for the Bellingham School District were four-year graduation rates that increased slightly—by 2.55% (OSPI, 2023).
**District Data.**

Policy Governance has allowed the Bellingham School District leadership team to focus on groups of students with greater speed and impact. Data provided by the Bellingham School District (2022; See Appendix I) in a document presented by the superintendent to the school board in 2022 showed that the overall 5-year graduation rates representing all students increased by 6% between 2014-2019. While the 5-year graduation rates among students not considered low-income only increased by 1% between 2014-2019, the 5-year graduation rates for low-income students increased by 13% during that same timeframe. Furthermore, the graduation rates for African American students increased by 19% between 2014-2019 and for Hispanic students by 14%. Students categorized with disabilities also showed a 7% increase in graduation rates between 2014-2019 (Bellingham Schools, 2022).

It is worth noting that on-time graduation rates at Options High School climbed 42.5% between 2014-2019, with a jump of 34.9% in 2017 when the new school building opened its doors. In addition, between 2014-2019, the Smarter Balance scores in English at Options High School increased by 45.6% and Math by 10% (OSPI, 2023).

The above data would support a conclusion that, though there were minor statistical improvements in standardized test data and graduation rates for the entire district, the superintendent had the autonomy because of Policy Governance to make targeted intervention decisions that resulted in a substantial increase in student success at Options High School, the school district's alternative high school.
Culture.

The second question asked by this study was what were the conditions of Policy Governance that impacted student success and the culture of district leadership in Bellingham. By design, Policy Governance has clearly defined the roles and responsibilities of Bellingham school board members and the superintendent. School Board member Kelly Bashaw reinforced this in Chapter IV:

When you get the means off the board's plate, that allows the board to focus on desired outcomes of the school district. It sharpens the board's focus on student outcomes; almost everything else it does is related to that.

Regarding the professional respect that Policy Governance provides, Superintendent Baker said,

The philosophy is, I am the expert educator, and the board stays at a high policy level and does not get into the weeds. I feel a sense of empowerment to make educated decisions at a level that I have never seen before in other districts.

Bringing organizational change to school district governance should be a long-term commitment. Policy Governance provided a leadership culture in Bellingham where the superintendent, Dr. Greg Baker, has stayed for 13 years, as opposed to the national average of 3 years.

Although a “can do” attitude is great, real change solutions in education take time. Systemic change may take superintendents 4-5 years to implement strategies that positively impact student achievement. For school boards, it may take as long as 5-10 years (Maloney, 2020c).
In a 2022 article published by EAB called “Voice of the Superintendent,” the survey of 141 school district superintendents from 32 states, found that the typical annual turnover rate for school superintendents is 14%-16%. In addition, EAB's (2022) survey shows that 46% of superintendents are considering or planning to leave their role in the next two to three years, and 66% have been in their role for less than 10 years.

When frequent leadership changes occur, it creates a public perception of increased instability, lowered morale, a loss of organizational direction and vision, and a general sense by the staff of “here we go again” that the district will undergo yet another round of short-lived programs and policies (Yee & Cuban, 1996, p. 616).

An essential finding of this study is that Policy Governance has created a trusting relationship between the Bellingham School District School Board and the Superintendent, resulting in the Superintendent feeling valued and empowered in his role in Bellingham. As a result, Dr. Greg Baker continues to serve the Bellingham community in his 13th year of leadership as the Bellingham School District Superintendent. In those 13 years, Dr. Baker has been recognized numerous times for his leadership, one of those honors being named 2020 Superintendent of the Year for the State of Washington. In addition, with the School Board's support, Dr. Baker has led his executive team to realize numerous other accomplishments.

Research shows that the total number of years that superintendents serve in their role significantly impacts students' achievement (Waters & Marzano, 2006). The correlation between Policy Governance and superintendent tenure is a topic of interest that needs more research. A study conducted by the Council of Great City Schools...
found that districts with Policy Governance had higher than average superintendent tenure of 4.7 years than those without Policy Governance, with an average tenure of 3.7 years (Council of Great City Schools, 2014). One reason for this correlation may be the clarity that Policy Governance provides regarding the roles and responsibilities of the board and the superintendent. When the board's expectations and the superintendent's responsibilities are clear, there is less confusion and ambiguity, which can contribute to greater trust between the board and the superintendent (Chen, 2013). This trust can lead to longer superintendent tenure. Another factor contributing to the correlation between Policy Governance and superintendent tenure is the culture of accountability that Policy Governance promotes. Under Policy Governance, the superintendent is held accountable for implementing the board's policies, and the board is responsible for evaluating the superintendent's performance based on those policies (Carver, 2006). This accountability can lead to a focus on achieving the board's goals, which can result in improved outcomes for the school district. When the superintendent is successful in achieving these goals, it creates greater job satisfaction and can lead to a longer tenure.

This study indicates that there is a positive correlation between Policy Governance and school superintendent tenure, and it can lead to improved outcomes for the school district and students. Bellingham School District's Superintendent, Dr. Greg Baker, said, "I feel like we have been able to be bold about some things, and if it was not for Policy Governance, that work may not have gotten done, or it would have become mired in politics." Between 2010 and 2023, Dr. Baker, his leadership team, and the Bellingham School District School Board have been able to do some remarkable things that the culture of trust provided with Policy Governance and the stability of
leadership over 13 years have made possible. Under Dr. Baker’s vision and leadership, the Bellingham School District has created an impressive list of accomplishments. The following are some highlighted achievements:

- Passed three bonds and eight levies.
  - The bonds have supported the rebuilding of nine new schools in the community, including Options High School.
  - In addition to the new schools, the bonds also supported a new middle school gym and turf football, baseball, and soccer fields at all of the district’s high schools.
- Eliminated nearly all school fees to families through an initiative called “Project Free Education.”
- Founded a Family Partnership for homeschool families in Bellingham.
- Transitioned all four high schools from all different bell schedules to a common district block 8-period schedule.
- Based on adolescent research, moved secondary start times to later in the morning.
- Invested resources into guidance counselors in every school, three mental health specialists for the district, and instructional coaches for every school.
- Implemented pre-K programs throughout the district called “Promise-K.”
- Increased the GRADS teen parent and childcare programs to serve students at each high school.

There are several benefits for a superintendent to remain in a school district for longer than the national average of 3-5 years, including an increase in organizational
stability; deeper and more trusting relationships with the board, faculty, and community; and the institutional knowledge to bring targeted change to the district. While there may be valid reasons for a superintendent to move on to a new role or a new school district, there are compelling reasons why staying in a district for an extended period can benefit students and the community.

**Recommendations**

Policy Governance provides clear structures for the roles, responsibilities, and accountabilities of the school board and the superintendent. The implementation of Policy Governance for a school district will require a dedication of time, planning, and a commitment to ongoing development. The Bellingham School District board members, superintendent, and other stakeholders provided this study with recommendations for other school boards or leadership teams to consider when implementing Policy Governance, such as the important role that Policy Governance consultants had on the early adoption stages as well as the importance of assigning mentors to new board members and the superintendent creating an executive team who can carry out the supportive clerical tasks that the school board will require.

**Books/Literature.**

A growing number of books and literary resources focus on Policy Governance, though a limited number are dedicated to school boards and public education. Many of the subjects interviewed for this study said that John Carver's books were where they started to learn about the Governance model. A few sources by Carver and Oliver specifically apply Policy Governance to K-12 schools. However, most resources and guidance must be applied from a business model to a school district governance
method. Dr. Ken Gass stated, "You cannot just read a book. It's not cookie-cutter. The policies have to be individual and applied to fit your community." Greg Baker said that once the school board hired him, he went out and purchased books; however, meeting with a Policy Governance consultant was where he gained his first true understanding of the model and where to begin the implementation journey. School Board member Kelly Bashaw also said in her interview that the school board attempted to read Carver’s books initially; but she was not confident that they were very helpful, at least not to her. She recalled that they were good at providing information regarding boards but not about elected school boards, which can be unique. Mrs. Bashaw also said that working with Policy Governance consultants is where their work began to take form and function.

Consultants.

Dr. Rick Maloney was one of the consultants who helped the Bellingham School District school board launch Policy Governance. "He's kind of the Policy Governance guru in our area," said school board member Douglas Benjamin. Working with Dr. Maloney helped the school board change its mindset and redefined board roles. For example, refocusing the board away from which programs to implement and setting expectations of board members and limitations for the superintendent was important work put into writing as the board wrote policies for their governance. Dr. Maloney was able to guide the board through this process based on his own experience and guide the board and superintendent to examples from other school districts that had already implemented Policy Governance. Greg Baker said, "We borrowed many of the early
policies from other districts, rewrote them to fit our district, and then over the years began to write our own."

**A leadership team to support the work.**

An essential finding of this study is that although Policy Governance provides a lot of positive attributes to leadership, transitioning to Policy Governance is a lot of work. Because the school board is not involved in the daily operational decision-making, the superintendent and executive team spend a lot of time rewriting traditional school board policies into operational policies. In addition to policy writing, the board still needs to be informed about progress toward goals and outcomes. All board members interviewed for this study commented on the length of time the board meets under Policy Governance. Dr. Greg Baker said, "Instead of the board spending a lot of time at board meetings debating how to spend money, the executive team writes extensive reports showing evidence of how the district is making progress towards the board's established outcomes." School Board member Douglas Benjamin stated that if a board meeting goes much longer than an hour, the board is not doing the right work. Benjamin says, "We have a board meeting once a month, and it usually is not much longer than an hour. An hour and a half would be pushing it, and that is only if we are dealing with a big controversy." Bellingham School District Board members and the superintendent all appreciate the concise business handled through the consent agenda and honoring everyone’s time by keeping meetings to an hour once a month, with other meetings reserved for school visits or community engagement events.
School board mentoring and onboarding.

Onboarding and mentoring board members, especially newly elected board members, about Policy Governance has been critical in helping Bellingham School District board members understand their roles and responsibilities. Policy Governance is dependent on the school board working together as one voice and eliminates a board member’s opportunity to act alone toward any particular outcome. Policy Governance helps board members stay accountable to each other and their community. Former school board member Dr. Steve Smith said,

We assigned each new board member a mentor and met with them before board meetings. We talk to them about what is coming up in the meeting, how the consent agenda is used, and the process of Policy Governance during a public meeting. After the meeting, we would debrief.

The Bellingham School District School Board Handbook (2023) is also mentioned by board members and the superintendent as a highly valuable tool in mentoring and informing the board and community. This 24-page document highlights The Bellingham Promise, the roles and responsibilities of the board and the superintendent, the Policy Governance process, the board meeting structure, and State and Federal laws that speak directly toward school and school board governance. Jackie Brawley and her team work with the superintendent to keep the School Board Handbook updated and available (see Appendix J). Periodically, the superintendent and designated board members will offer an information workshop to community members interested in the school district’s governance or considering running for an open school board seat during an election cycle. Community members sometimes consider running
for school board election because they have a particular interest. Doug Benjamin says, "You shouldn't become a board member to debate how the high school football team is going to operate."

Bellingham School District Board members and the Superintendent stress the importance of helping new board members understand how Policy Governance fits into the goals and outcomes for the district and its impact on student achievement. With mentoring and ongoing support of one another, board members can be effective leaders who can make a meaningful difference in their community by setting End goals that represent the best that the district has to offer for students in their schools.

**Implications for Future Research**

The connection of Policy Governance to school superintendent tenure and student achievement seems to have a correlation. Policy Governance provides a clear framework for school boards to work within and places the superintendent in a role where they are solely responsible for implementing the desired board policies. This structure can be empowering to a superintendent and, as this study has suggested, may have an impact on students' success.

There is a need for future research to explore the correlation between Policy Governance, superintendent tenure, and student success. While some existing research suggests that there may be a relationship between these variables, more research is needed to confirm or refute these hypotheses. One area of research that needs further exploration is the impact of Policy Governance on student success and what defines success. For example, is success limited to test scores and graduation rates, or can acceptable success ratings be aligned to the whole child Ends goals
determined by the school board? Such goals may be drop-out rates, attendance rates, suspension rates, or student perception data that are collected from sources like the Healthy Youth Survey.

While Policy Governance is being used in many school districts, there is limited research on its effectiveness in improving student outcomes. Future research could investigate the impact of Policy Governance on student achievement, graduation rates, and other measures of student success.

Another area of research that needs further exploration is the impact of superintendent tenure on student success. Research has shown that longer tenures for superintendents are associated with improved student outcomes. However, it is unclear how Policy Governance affects the relationship between superintendent tenure and student success. One might infer from this study that Policy Governance has created a culture in the Bellingham School District that has resulted in a longer-than-typical tenure of the superintendent. This research could help school boards and district leaders understand the most effective ways to implement Policy Governance and reduce superintendent turnover, with a deeper examination of the extent to which these factors lead to improved student success.

By understanding the relationship between these variables, school districts can make informed decisions about their governance structures and leadership strategies to improve student outcomes. Further research will also help determine if the success that the Bellingham School District has experienced can be attributed to Policy Governance or if that success could be better attributed to the leaders involved, regardless of governance.
Summary

Public education plays a crucial role in the growth and development of a community. Likewise, the health of a school district can often gauge a community’s perceived value. Investing in the health of the school board and superintendent governance can have a positive impact throughout the organization. Policy Governance is a model of school board governance that emphasizes strategic thinking and accountability and clarifies the roles and responsibilities of board members and the superintendent. The clarifications include policies that limit actions by board members and the superintendent that reinforce their roles concerning school district policy and operational governance.

This study found that Policy Governance implemented in the Bellingham School District influenced the superintendent's ability to govern the school district in a way that demonstrated increased student success. Under the Policy Governance model, the superintendent and school board work together to establish the district's vision and goals, develop policies aligning with those goals, and hold themselves and the superintendent accountable for achieving them. In Policy Governance the goals that the school board establishes in policy are referred to as Ends.

Policy Governance promotes collaboration between the superintendent and school board. While the school board is responsible for setting the district's vision and Ends, they trust the superintendent to develop strategies to achieve those Ends. Because the superintendent's yearly evaluation is also tied to the school board Ends for the school district, the superintendent and school board must work together to ensure
that their efforts are aligned and that they are progressing towards their shared mission, or in Bellingham's case, The Bellingham Promise.

Ultimately, the success of a school district should be measured by the success of its students. The Policy Governance model provides a structure where the superintendent and school board are held accountable for ensuring students achieve at their full potential. This researcher experienced Policy Governance firsthand while serving as the Principal of Options High School between 2013-2121. Policy Governance provided a culture of trust between the school board and superintendent where bold leadership decisions were made and the needs of at-risk youth in the Bellingham School District were elevated. This provided a vision and resources for a new and unique program and facility, Options High School. This study showed that the investment made into Options High School resulted in greater student success than the state and district averages. Although there is no direct correlation between Policy Governance and student achievement, this study does conclude that Policy Governance is the preferred model of governance in the Bellingham School District and that it has resulted in positive student outcomes over the past 13 years.
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Appendix A: Interview Questions
INTERVIEW QUESTIONS

SUPERINTENDENT

1. What conditions led to the school Bellingham School Districts School Boards' interest in adopting Policy Governance as their new model?

2. Were there specific challenges that the school board intended to address by adopting a Policy Governance model?

3. Did you, school board members, or faculty of the district express concern or resistance to the governance model change? If yes, what were those concerns or what was the resistance to?

4. What preparation was needed by board members and the superintendent to change the school district governance model to Policy Governance?

5. How does the “Policy Governance” model vs “Traditional School Board Governance” influence the Superintendent’s ability to bring change to the school district and student achievement?

6. What challenges and/or barriers did the board and superintendent experience during the transition to Policy Governance?

7. How long did it take for Policy Governance to be fully implemented in the Bellingham School District?
8. How is the governance of the school district different now than it was before Policy Governance was implemented?

9. After adopting Policy Governance did the relationship between the school board and the superintendent change? If yes, how?

10. How does the superintendent support new board members with the Policy Governance model?

11. Were there any success criteria established to review if Policy Governance was having a positive or intended impact on the district?

12. In your opinion, is Policy Governance having a positive impact on the Bellingham School District? Why/Why not?

13. How do the school board and the superintendent know if Policy Governance is effective?

14. Has Policy Governance had a positive impact on student achievement in the Bellingham School District?

15. What advice would you give to other districts considering Policy Governance?

16. Is there someone else who you feel that I should be interviewing as well?

17. Once completing the transcription of this interview is it alright with you that I email you the transcription to verify that what was recorded is accurate?
SCHOOL BOARD MEMBERS

1. What conditions led to the Bellingham School Districts' interest in adopting Policy Governance as their new model?

2. Were there specific challenges that the school board intended to address by adopting a Policy Governance model?

3. Were there board members that expressed concern or resistance to the governance model change? If yes, what were those concerns or what was there resistance to?

4. What preparation was needed by board members and the superintendent to change the school district governance model to Policy Governance?

5. What challenges and/or barriers did the board and superintendent experience during the transition to Policy Governance?

6. How long did it take for Policy Governance to be fully implemented in the Bellingham School District?

7. How is the governance of the school district different now than it was before Policy Governance was implemented?

8. After adopting Policy Governance did the relationship between board members change? If yes, how?

9. After adopting Policy Governance did the relationship between the school board and the superintendent change? If yes, how?
10. How does the school board make sure that the governance model remains a Policy Governance model?

11. How does the school board support new board members with the Policy Governance model?

12. Were there any success criteria established to review if Policy Governance was having a positive or intended impact on the district?

13. In your opinion, is Policy Governance having a positive impact on the Bellingham School District? Why/Why not?

14. What conditions would be necessary for the board to consider moving away from Policy Governance to another governance model?

15. How does the school board know that Policy Governance is effective?

16. Has Policy Governance had a positive impact on student achievement in the Bellingham School District?

17. What advice would you give to other districts considering Policy Governance?

18. Is there someone else who you feel I should be interviewing as well?

19. Once completing the transcription of this interview is it alright with you if I email you the transcription to verify that what was recorded is accurate?
EXECUTIVE FACULTY

1. What years did you serve in the school district?

2. What is or was your role with the Bellingham School District between 2010 and 2022?

3. What conditions led to the school Bellingham School Districts School Boards' interest in adopting Policy Governance as their new model?

4. Were there specific challenges that the school board intended to address by adopting a Policy Governance model?

5. Were there concerns or resistance to the governance model change? If yes, what were those concerns or what was there resistance to?

6. How does the “Policy Governance” model vs “Traditional School Board Governance” influence the Superintendent’s ability to bring change to the school district and student achievement?

7. How long did it take for Policy Governance to be fully implemented in the Bellingham School District?

8. How is the governance of the school district different now than it was before Policy Governance was implemented?

9. After adopting Policy Governance did the relationship between the school board
and the superintendent change? If yes, how?

10. Were there any success criteria established to review if Policy Governance was having a positive or intended impact on the district?

11. In your opinion, is Policy Governance having a positive impact on the Bellingham School District? Why/Why not?

12. Has Policy Governance had a positive impact on student achievement in the Bellingham School District?

13. What advice would you give to other districts considering Policy Governance?

14. Is there someone else who you feel that I should be interviewing as well?

15. Once completing the transcription of this interview is it alright with you that I email you the transcription to verify that what was recorded is accurate?
Appendix B: The Bellingham Promise
the Bellingham Promise

**vision**
We, as a community, make a collective commitment to Bellingham’s children. We will empower every child to discover and develop their passions, contribute to their community, and achieve a fulfilling and productive life.

**mission**
We collectively commit that our students are cared for and respected, and that they will graduate from our schools prepared for success. All students will be exceptional in their own way, with strong character, a passion for learning, and ready for the widest range of educational and vocational options to support a diversity of life choices.

**core beliefs**
We believe:
- all children should be loved,
- the whole child is important,
- every child can learn at high levels,
- early learning and development are critical,
- learning is lifelong and essential to a high quality of life,
- compassion and service build community,
- teaching children to do their best involves self-reflection and reaching higher,
- diversity enhances a strong and healthy community, and
- together we achieve more than alone.

**outcomes**
We develop students and graduates who are...

**knowledge**
- readers and writers,
- scientists and mathematicians,
- historians and global thinkers,
- artists and performers,
- artisans and technicians,
- multilingual readers and speakers,
- skilled users of technology and information,

**character**
- leaders, collaborators and team players,
- dependable and responsible people,
- confident individuals who continuously challenge themselves,
- respectful and compassionate humans,
- honest and ethical individuals who act with integrity,

**action**
- healthy, active individuals,
- critical thinkers and problem solvers,
- effective communicators,
- innovators and creators, and
- well-rounded community members engaged with the broader world.

**key strategies**
We will accomplish this by focusing on...

**Equity, Diversity and Inclusion**
We envision and strive for a more diverse, inclusive and equitable organization. Focus areas include, but are not limited to, race and ethnicity, gender identity and sexual orientation, socioeconomic status, ability, language and culture.

**Innovation and Flexibility**
We support the diverse needs and learning styles of our students by being innovative and flexible. We embrace change and creative thinking and know that this requires a high level of trust and engagement with our community.

**Early Childhood Education**
We support students and families from prenatal through graduation. We invest in a strong early childhood program because of its powerful long-term return for our students and community.

**Great Teaching with Strong Support**
High quality instruction occurs every day in every classroom, where we establish a safe and engaging learning environment. We support culturally-responsive instruction through effective leadership, ongoing staff learning, and a diverse staff reflective of our students.

**Student, Family, and Community Engagement**
We develop partnerships and engage with a wide variety of stakeholders, including families and community partners, to support the success of all students.

A One Schoolhouse Approach
Our schools are part of a larger One Schoolhouse, and we focus on taking care of each other. We provide an equitable distribution of resources and services to ensure excellence for all students.

bellinghamschools.org
Appendix C: Outcomes Focused on Knowledge
OUTCOMES FOCUSED ON KNOWLEDGE

Bellingham Public Schools is committed to developing students and graduates who are:

- Readers and writers,
- Scientists and mathematicians,
- Historians and global thinkers,
- Artists and performers,
- Artisans and technicians,
- Multilingual readers and speakers, and
- Skilled users of technology and information.

Approved by: School Board
Regular Board Policy Review Frequency: Annually
Monitoring of Superintendent Frequency: Annually
Approved: 9/10/09 Reviewed/Revised: 8/9/12; 6/14/16; 6/20/17

Superintendent/Board Signatures:

Greg Baker, Superintendent

Camille Diaz Hackler, Director

Kelly M. Bashaw, Director

Quenby M. Peterson, Director

Douglas Benjamin, Director

Steven H. Smith, Director

Appendix C
Appendix D: Governance Commitment and Beliefs
Policy Type: Governance Process

GOVERNANCE COMMITMENT AND BELIEFS GP-1

The board’s goals are a high-quality education and a successful outcome for all students. The board’s core beliefs are the foundation of students’ success. The board and the district staff hold themselves accountable to the community that all actions taken to achieve the goals are consistent with the law, board policies, and the good of all students.

1. In the fulfillment of this charge, the board is committed to rigorous, continual improvement of the district and the board’s capacity to govern effectively, using its policies to define its values and vision to achieve the district’s mission.

2. The following are our core beliefs:
   a. All children should be loved.
   b. The whole child is important.
   c. Every child can learn at high levels.
   d. Early learning and development are critical.
   e. Learning is lifelong and essential to a high quality of life.
   f. Compassion and service build community.
   g. Teaching children to do their best involves self-reflection and reaching higher. h. Diversity enhances a strong and healthy community.

Together we achieve more than alone.

Approved by: School Board
Regular Board Policy Review Frequency: Annually
Monitoring of Superintendent Frequency: Annually
Approved: 9/10/09 Reviewed/Revised: 9/13/12; 3/23/17

Superintendent/Board Signatures:

Camille Diaz Hackler, Director
Quenby M. Peterson, Director
Steven H. Smith, Director

Greg Baker, Superintendent
Kelly M. Bashaw, Director
Douglas Benjamin, Director
Appendix E: Board/Superintendent Relationship
Policy Type: Board/Superintendent Relationship

Board/Superintendent Connection B/SR-1

The board’s sole connection to the operations of the district is through the superintendent. Only the board’s carried motions are binding on the superintendent. All authority and accountability for district employees is under the purview of the superintendent and not the board.

Accordingly:
1. The primary responsibilities of the board are:
   a. hiring a superintendent;
   b. monitoring the superintendent's performance in meeting the district goals found in the Ends policies;
   c. monitoring the superintendent's compliance with the Executive Limitations policies; d. preparing the superintendent's annual summative evaluation for the preceding year; and
   e. annually reviewing the superintendent's employment contract with the district.

2. Decisions or instructions of individual board members, officers, or committees are not binding on the superintendent except in rare instances when the board has specifically delegated such authority through open meeting vote.
   a. This does not preclude individual board members from asking the superintendent for reasonable clarifying (or additional) information regarding board agenda items.

3. Board members will encourage problem resolution at the lowest possible level. When a board member hears about a concern, they should encourage the community member to discuss the concern directly with the district employee who is immediately responsible. The board member shall also describe the appropriate channels to elevate a concern (e.g., discussion with classroom teacher, school principal, central administration, and finally the superintendent, if it is not resolved). As appropriate, the board member will report such contacts to the superintendent or their designated representative.
   a. When a board member has a concern about a child or relative who is a student in the district, the board member will seek to resolve those concerns at the lowest possible level as a relative -- not as a board member. The superintendent will be advised of the concerns if appropriate.
4. The board or individual members will never give instructions to persons who report directly or indirectly to the superintendent.

   a. The board will not evaluate any staff member other than the superintendent. b. Board members shall refrain from direct criticisms of district employees. All concerns shall be channeled through the superintendent.
   c. Board member questions about operations, direction, strategy, etc., should be directed through the superintendent and not school district employees.

5. The superintendent, board president, or other school district designee will communicate the official district position to the media. Board members may state personal positions if it is made clear that the board member is not speaking for the board or the district.

6. The board designates the superintendent as the primary contact person with the board’s lawyer. The board president may contact the lawyer about the superintendent’s contract or after gaining agreement from the board vice president.

Approved by: School Board
Regular Board Policy Review Frequency: Annually
Monitoring of Superintendent Frequency: Annually
Approved: 9/10/09 Reviewed/Revised: 12/11/14 (combined B/SR 1,2, and 3); 3/23/17; 11/10/21

Superintendent/Board Signatures:

Camille Diaz Hackler, Director
Greg Baker, Superintendent
Jenn Mason, Director
Kelly M. Bashaw, Director
Katie Rose, Director

Douglas Benjamin, Director
Appendix F: Strategic Mission and Vision Ends
Policy Type: Ends

STRATEGIC VISION AND MISSION ENDS 1

Vision: We, as a community, make a collective commitment to Bellingham’s children. We will empower every child to discover and develop their passions, contribute to their community, and achieve a fulfilling and productive life.

Mission: We collectively commit that our students are cared for and respected and that they will graduate from our schools prepared for success. All students will be exceptional in their own way, with strong character, a passion for learning, and ready for the widest range of educational and vocational options to support a diversity of life choices.

Approved by: School Board
Regular Board Policy Review Frequency: Annually
Monitoring of Superintendent Frequency: Annually
Approved: 9/10/09 Reviewed/Revised: 8/9/12; 6/14/16; 6/20/17; 8/14/19

Superintendent/Board Signatures:

Greg Baker, Superintendent Camille Diaz Hackler, Director

Kelly M. Bashaw, Director Jennifer I. Mason, Director

Douglas Benjamin, Director Quenby M. Peterson, Director
Appendix G: Expectations of the Superintendent
Policy Type: Executive Limitations

EXPECTATIONS OF THE SUPERINTENDENT EL-1

The superintendent shall not allow through action or inaction any legal, contract, or policy violation, nor shall the superintendent through action or inaction allow the district’s public image or credibility to fall into disrespect or ill repute.

1. The superintendent shall not fail to take all reasonable and prudent actions with respect to district management and oversight that are typical for similar and highly effective organizations.

2. The superintendent shall not fail to:
   a. provide an affirmative (or negative) statement the following actions have been taken:
      i. all Washington State School Directors’ Association (WSSDA) administrative policies and procedures in the Essential Category are regularly reviewed and updated as necessary;
      ii. all WSSDA Encouraged and Discretionary administrative policies and procedures updates have been reviewed, considered or updated as necessary; and
      iii. all administrative policies and procedures updates have been shared with staff for implementation as appropriate.

Approved by: School Board
Regular Board Policy Review Frequency: Annually
Monitoring of Superintendent Frequency: Annually
Approved: 9/10/09 Reviewed/Revised: 8/9/12 (combining EL-1 & EL-18); 6/27/13; 9/11/14; 1/12/17; 11/1/17; 2/27/19

Superintendent/Board Signatures:

Greg Baker, Superintendent
Camille Diaz Hackler, Director
Kelly M. Bashaw, Director
Quenby M. Peterson, Director
Appendix H: 1000 Policy: Legal Status and Operations
1000 Policy – Legal Status and Operations

Status

The board of directors of Bellingham Public Schools is the corporate entity established by the state of Washington to ensure quality in the content of the district's educational program and provide students with an opportunity to achieve those skills recognized as requisite to learning.

The governance policies of the board describe the board's job and how it directs the superintendent to achieve the "ends." The board's operating policies are those that the board adopts from time to time to facilitate its manner of conducting official business.

Organization

The corporate name of this school district is Bellingham School District No. 501, Whatcom County, state of Washington. The district is classified as a first class district and is operated in accordance with the laws and regulations pertaining to first class districts.

In order to achieve its policies in The Bellingham Promise, the board will exercise the full authority granted to it by the laws of the state. Its legal powers, duties and responsibilities are derived from state statute and regulation. Sources such as the school code (Title 28A RCW), attorney general's opinions, regulations of the State Board of Education (Title 180 WAC), and the State Superintendent of Public Instruction (Title 392 WAC) delineate the legal powers, duties and responsibilities of the board.

Number of Members and Terms of Office

The board will consist of five members, elected by ballot by the registered voters of the district. Except as otherwise provided by law, board members will hold office for terms of four years and until their successors are elected and qualified. Terms of board members will be staggered as provided by law.

Newly-elected directors will take office at the first official meeting of the board of directors after the election results have been certified by the county auditor. Prior to beginning their term, directors will take and subscribe to an oath of office.
Approved By: Superintendent Greg Baker and Board President Camille Diaz Hackler
Adopted/Previous Revisions: 05/10/79; 10/11/07
Updated: 08/25/16

Superintendent or Board Approved: Board Approved

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Appendix I: Bellingham Public Schools 5-Year Graduation Rates
Appendix I

All Students

Birmingham Public Schools 5-Year Graduation Rates

Percent of Students
Students from Low-Income Families
Bellingham Public Schools 5-Year Graduation Rates
Students from Non-Low-Income Families
Bellevue Public Schools 5-Year Graduation Rates
Hispanic and Latinx Students
Bellingham Public Schools 5-Year Graduation Rates
Bellingham Public Schools 5-Year Graduation Rates
Black and African American Students
Bellingham Public Schools 5-Year Graduation Rates

Students of Two or More Races
Students with Disabilities Bellmam Public Schools 5-Year Graduation Rates
Multilingual Learners
Bellingham Public Schools 5-Year Graduation Rates
Students Experiencing Homelessness
Bellingham Public Schools 5-Year Graduation Rates
Bellingham Public School 5-Year Graduation Trendlines
Groups do not show 5-year cohort data prior to Class of 2012. Data from the new state resource begins with data from school year 2012-13, so some student homeless data reporting began with Class of 2012 but not data reported for school year 2019-20. Officially 89.4% of student data errors were included Sea Mar Visions, so the overall SYR rate is accurately 89.9% but slightly during the clean-up.

*Data for 5-year rate for Class of 2021 (which ends with school year 2021-22) is still preliminary.

Notes
Appendix J: School Board Handbook
School Board Handbook

Last Updated: Winter 2023

Bellingham Public Schools
a collective commitment
the Bellingham Promise

vision
We, as a community, make a collective commitment to Bellingham's children. We will empower every child to discover and develop their passions, contribute to their community, and achieve a fulfilling and productive life.

mission
We collectively commit that our students are cared for and respected, and that they will graduate from our schools prepared for success. All students will be exceptional in their own way, with strong character, a passion for learning, and ready for the widest range of educational and vocational options to support a diversity of life choices.

core beliefs
We believe:
• all children should be loved,
• the whole child is important,
• every child can learn at high levels,
• early learning and development are critical,
• learning is lifelong and essential to a high quality of life,
• compassion and service build community,
• teaching children to do their best involves self-reflection and reaching higher,
• diversity enhances a strong and healthy community, and
• together we achieve more than alone.

outcomes
We develop students and graduates who are...

• readers and writers,
• scientists and mathematicians,
• historians and global thinkers,
• artists and performers,
• artisans and technicians,
• multilingual readers and speakers,
• skilled users of technology and information,
• leaders, collaborators and team players,
• dependable and responsible people,
• confident individuals who continuously challenge themselves,
• respectful and compassionate humans,
• honest and ethical individuals who act with integrity,
• healthy, active individuals,
• critical thinkers and problem solvers,
• effective communicators,
• innovators and creators, and
• well-rounded community members engaged with the broader world.

key strategies
We will accomplish this by focusing on...

Equity, Diversity and Inclusion
We envision and strive for a more diverse, inclusive and equitable organization. Focus areas include, but are not limited to, race and ethnicity, gender identity and sexual orientation, socioeconomic status, ability, language, and culture.

Innovation and Flexibility
We support the diverse needs and learning styles of our students by being innovative and flexible. We embrace change and creative thinking and know that this requires a high level of trust and engagement with our community.

Great Teaching with Strong Support
High quality instruction occurs every day in every classroom, where we establish a safe and engaging learning environment. We support culturally-responsive instruction through effective leadership, ongoing staff learning, and a diverse staff reflective of our students.

Early Childhood Education
We support students and families from prenatal through graduation. We invest in a strong early childhood program because of its powerful long-term return for our students and community.

A One Schoolhouse Approach
Our schools are part of a larger One Schoolhouse, and we focus on taking care of each other. We provide an equitable distribution of resources and services to ensure excellence for all students.

Student, Family, and Community Engagement
We develop partnerships and engage with a wide variety of stakeholders, including families and community partners, to support the success of all students.
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Bellingham Public Schools does not discriminate in any programs or activities on the basis of sex, race, creed, religion, color, national origin, age, veteran or military status, sexual orientation, gender expression, gender identity, disability, or the use of a trained dog guide or service animal and provides equal access to the Boy Scouts and other designated youth groups. The following employee(s) has been designated to handle questions and complaints of alleged discrimination: Title IX Coordinator and 504 Coordinator, Directors of Teaching and Learning, 360-676-2787; Civil Rights Coordinator, Assistant Superintendent of Human Resources, 360-647-6811. You can report discrimination and discriminatory harassment to any school staff member or to the district’s coordinators, listed above. You also have the right to file a complaint. For a copy of your district’s nondiscrimination policy and procedure, contact your school, the District Office or view Policy 3210 and Procedure 3210 at bellingshamschools.org.
Overview

Bellingham Public Schools has approximately 11,000 students and 1,400 staff members. There are 14 elementary schools, four middle schools, three high schools, one alternative high school and a family partnership program. As of the 2022-23 school year, staffing consists of 899 full-time equivalent (FTE) certificated staff (teachers, counselors, etc.), 289 FTE classified staff (operations staff, secretaries, etc.), and 212 (FTE) trades and service workers. As a measure of the district’s physical scale, the 22 main school buildings alone contain over 1.5 million square feet and are situated on 272 acres. The district’s school attendance areas extend beyond the boundaries of the city of Bellingham and cover approximately 100 square miles.

Primary role of the school board — superintendent evaluation

The board’s most critical role is to hire a superintendent and monitor the leader’s performance in meeting the goals of the organization without violating typical standards of practice.

The superintendent’s role is to make all the decisions necessary to achieve the goals as established by the board and to be responsible for those decisions and the outcomes.

The superintendent is evaluated twice per year. An informal evaluation is done in January or February of each year at the mid-year retreat. Typically, the process involves the board and the superintendent having a round-table discussion about the positives and areas for improvement. A formal evaluation is completed annually near the end of the academic year in June. The bulk of the formal evaluation is comprised of the board’s responses to the superintendent’s Monitoring Reports presented throughout the year. These Monitoring Reports describe progress made on the board’s Ends (goals) for the district and Executive Limitations set on the superintendent by the board. The board president is responsible to initiate the annual review and complete the final report no later than the last board meeting in June. Each board member should peruse the annual review and provide additional comments for the final report. The final annual superintendent evaluation report is posted to the district website for public access.

The superintendent’s employment contract is reviewed annually as part of the annual evaluation. State law does not allow for contracts longer than three (3) years (per RCW 28A.330.100(1) and RCW 28A.400.010). Nonetheless, a typical practice is to annually add an additional year to the contract after satisfactory review of the superintendent so that the contract has a rolling three-year term. At the end of an agreed upon term (typically three to five years), a more comprehensive renegotiation of the superintendent’s contract is undertaken.

Induction and development of new board members

MENTORS
A senior board member is assigned to each new board member to provide informal support about board protocol.

WSSDA ANNUAL CONFERENCE
THIRD WEEK OF NOVEMBER

Newly elected school board members are sworn in during the first regular meeting in December; however, the Washington Administrative Code (WAC) allows successful candidates to attend the November WSSDA Conference in place of the retiring board member. The annual WSSDA Conference is typically the weekend before Thanksgiving. New board members are strongly encouraged to attend the “New Board Member Boot Camp” on the first day of the WSSDA Conference, designed to provide basic knowledge on the role of school board members in Washington and the state education system.
The conference provides time for board members to interact informally, become better acquainted, and build understanding and trust and thereby create a new cohesive team around the new board members.

**OPEN GOVERNMENT TRAINING COURSE REQUIREMENT**

Each new board member must take the course within 90 days of taking the oath of office. The course is conveniently offered at the WSSDA Conference.

**POLICY GOVERNANCE® (PG)**

Few new board members will have had any experience with policy governance, with its own unique vocabulary and protocols. Sessions on PG are often presented at the WSSDA Conference. In addition, the mentor, board president and superintendent will support the new member, as needed.

**School Board governance**

*Policy Governance® (PG)* is a system of policies and procedures by which an organization’s board provides oversight for the organization. PG, developed by John Carver, provides specific objectives (i.e. Ends) that the organization must strive to accomplish while not violating basic standards of practice (i.e. Executive Limitations). The board’s organizational oversight is enacted by modifying the ends and executive limitations to set goals and to limit the actions taken to achieve those goals. The critical component of PG is that the board does not direct the organization or its employees on the actions (i.e. Means) to achieve the goals. The only direct oversight the board exerts over the organization is 1) hiring the superintendent, 2) monitoring the superintendent’s performance on achieving the Ends monitoring compliance with the executive limitations, and 3) renegotiating or terminating the superintendent’s contract. [The Lighthouse Governance model developed by the government of New South Wales is similar to PG.]

See the district website for all policies established and maintained by the board.

**ENDS**

Ends are the outcomes the board expects the organization to achieve. The Ends should be tightly linked to the mission of the organization. Ends should be clearly defined and measurable. In our case, the Ends are expressed in the form of The Bellingham Promise.

- The board monitors progress in achieving the Ends of the organization through annual reports from the superintendent to the board—Ends Monitoring Reports.
- After each Ends Monitoring Report, the board reviews and comments upon the superintendent’s progress in meeting the Ends—Ends Monitoring Response—which becomes part of the superintendent’s annual evaluation. This system of reporting and immediate feedback leads to an annual evaluation with no surprises for the superintendent.
- At the conclusion of each report and response, the board reviews its Ends policies to determine if modifications are necessary.

**EXECUTIVE LIMITATIONS**

Executive Limitations (ELs) are the restrictions placed upon the executive’s actions as the superintendent guides the organization in achieving the Ends.

- The board monitors the superintendent’s adherence to the executive limitations through annual reports from the superintendent to the board — Executive Limitations Monitoring Reports.
- After each Executive Limitations Monitoring Report, the board reviews and comments upon the superintendent’s adherence to the Executive Limitations — Executive Limitation Monitoring Response — which becomes part of the superintendent’s annual evaluation.
- At the conclusion of each report and response, the board reviews its Executive Limitations to determine if modifications are necessary. To tighten or loosen control over the superintendent, the board can increase or decrease the limitations on the superintendent’s ability to take certain actions.
• There must be a high level of trust between the board and the superintendent for this system of self-reporting compliance to be effective. If trust is lacking, the board may require outside verification of compliance. Currently, the only routine outside verification process for Bellingham Public Schools is the annual audits performed by the Washington State Auditor’s Office. It is recommended that at least one board member attend the annual audit exit conference.

**BOARD/SUPERINTENDENT RELATIONS POLICIES**

Board/Superintendent Relations (BSR’s) policies define the responsibilities of the board and the responsibilities of the superintendent. In the BSR’s, the board delegates to the superintendent the responsibility for all decisions in running the organization to meet the goals (the “Means”). The BSR’s also contain the procedures for which the board monitors and evaluates whether the superintendent has met the organizational End goals and whether he or she has stayed within the Executive Limitations in reaching those goals.

**GOVERNANCE PROCESS POLICIES**

Governance Process (GP’s) Policies are the policies that guide the board’s internal operations, annual calendar of meetings and reports, the roles of the various board members, and basic standards of board performance and behavior.

**WSSDA BOARD OPERATING POLICIES**

The Washington State School Directors Association (WSSDA) produces and keeps up to date a comprehensive list of standardized operating policies based on changes in Washington State law or regulations. Under a policy governance model, the vast majority of these administrative policies and procedures that describe how the school district operates are set by the superintendent per policy 1310. The 1000 series, which relates to Board of Directors Operating Policies, are legally required. The superintendent and staff support the board in updating these policies.

**Board code of conduct**

**THE BOARD’S CODE ESTABLISHED IN GOVERNANCE PROCESS POLICY GP-8**

The board commits itself and its members to ethical, businesslike and lawful conduct, including proper use of authority and appropriate decorum when acting as board members as defined by its Governance Policies and the WSSDA Code of Governance.

**School board communications**

**COMMUNICATION WITH THE MEDIA**

• As the spokesperson of the board, only the president should respond to questions from the media about the school board’s decisions; other members should refer all questions to the president.

• For news events, bonds and levies, the board president will refer the media to the superintendent or the executive director of communications and community relations for consistent messaging.

• When expressing their opinion on matters or events affecting the district, school board members should clarify that they are speaking for themselves, not the board as a whole. Board members are expected to support and explain board votes, not undermine them, even if they opposed the decision.
COMMUNICATING WITH OTHER BOARD MEMBERS OR THE SUPERINTENDENT

- All emails to the superintendent should include one other board member, which is typically the board president. This standard of practice provides a buffer against one board member exerting undue pressure or influence over the superintendent. In the case of the president emailing the superintendent, the president should include the board vice president in the email.

- As a courtesy, email inquiries regarding board business should typically be responded to within 24 hours of receipt.

- Board member to board member two-way communication by any means is permissible.

- Board members should refrain from emailing all board members at one time to limit any actual or perceived violations of the Open Public Meetings Act [OPMA — 42.30 and 42.32 RCW]. Emails that need to go to the entire board should typically be forwarded by the board secretary (i.e. the superintendent) or the executive administrative assistant to the superintendent. The exception being scheduling questions for which "responding all" for expediency sake is appropriate.

- Board members should use only their district-issued email accounts and district-supplied technology devices for all school-, district- and board-related communications and not personal email accounts or home devices for these purposes.
Meetings

Board business meetings and expectations

OPEN PUBLIC MEETINGS ACT (OPMA)
Board decisions only occur by majority vote of a quorum of three members in a regularly advertised open public meeting. Three or more board members meeting face to face or electronically outside of a regularly scheduled public meeting to discuss board business is a violation of the OPMA, punishable by fine. See OPMA on page 17.

REGULAR BOARD (BUSINESS) MEETINGS
Business meetings often occur at 6 p.m. once per month on a Thursday mid-month (see GP-7.2 Annual Board Agenda) either at Options High School or the District Office. Regular attendance is expected (duration 1 to 2.5 hours).

GIVE NOTICE OF ABSENCES
Notify the board president and/or the superintendent of anticipated or unplanned absences from any board event as listed in GP-7.2 and described below under Annual Calendar.

EXCESSIVE ABSENCES
All absences from regular board meetings are treated as unexcused absences. The current RCW 28A.343.390 allows for the removal of a board member after four (4) consecutive unexcused absences of regular board meetings. If a board member has four consecutive unexcused absences, the board will make a decision regarding the removal of a board member on a case-by-case basis.

AGENDA
The agenda for a school board meeting is available to the board ahead of the Thursday board meeting.

The agenda and all attachments are made available through BoardDocs, an online board meeting management and document retrieval program.

Addressing Questions: If a board member has a question about a specific item on the agenda, they should email the board president and the superintendent the question no later than the Wednesday preceding the board meeting.

• The goal is to have legitimate questions thoughtfully considered and answered in the meeting or, for clarifying questions or background information, allow the superintendent time to email all board members with the requested information prior to the meeting.

• It is improper for board members to engage in “gotcha” questioning.

CONSENT AGENDA ITEMS, CLARIFYING QUESTIONS
While board members may send informational questions, consent agenda items are routine operating items, under the purview of the superintendent and not topics for lengthy board discussion. Some consent agenda items may address issues of sufficient district or community importance to warrant a presentation during the meeting for information only. Consent agenda items will only be pulled off of the consent agenda when a board member has a conflict of interest.

MEETING PREPARATION
It is expected that each and every board member will have read and gained a sufficient level of understanding regarding the items on the board agenda before attending a board meeting (1-3 hours required).

TREATMENT OF THE AUDIENCE
Members of the public who have signed up to address the board are allotted three minutes at the beginning of the meeting. Personal complaints about district personnel are not permitted. Board members are expected to listen attentively. The president acknowledges the speaker and may direct concerns to appropriate staff without establishing dialog. During the business meeting the public may not otherwise comment or ask questions.

RULES OF ORDER
The board loosely follows Robert’s Rules of Order. It should be noted that since there are only five (5) board members, seconds are not technically needed for motions to be voted upon.
RESOLUTIONS
The board regularly considers resolutions that are legally required, such as proposals for levies and bonds.

A resolution may also be considered when members want to collectively advocate for change to send a message to stakeholders and the community. The board does not approve advocacy-related resolutions often; its role is to set policy, develop clear expectations for results and evaluate progress.

While the board acknowledges that there are many causes worthy of recognition and advocacy, considering and adopting resolutions can be challenging. Beyond advancing district-related business, the board will only consider a resolution under the rarest of circumstances, as determined by the board.

Annual calendar

Additional types of meetings, expectations for board attendance and Scheduling (estimated hours per year for each activity). See GP-7.1 Annual Board Agenda.

SCHOOL VISITS
(scheduled eight times per year, 1 hour)
Open to the public, no board business. Once per month during the academic year, typically on the first Tuesday of each month at 7:30 a.m., the board, superintendent and members of the executive team visit one of the district’s schools. The goal is to be acquainted with each school’s programs and initiatives put in place to meet the goals of The Bellingham Promise. On a three-year rotation, the board visits every district school. Board attendance expected.

MONTHLY SUPERINTENDENT UPDATES
(scheduled eight times per year, 1 hour)
Private discussion with the superintendent and one other board member on current educational events and initiatives in the district and state, scheduled by mutual convenience either over breakfast or lunch. No board business. Board attendance expected.

LINKAGES OR FOCUS GROUP DISCUSSIONS
(scheduled four to five times per year, 1.5 – 2 hours)
Open to the public, no board business. Held at the district office, various schools and at convenient times for each group. Board attendance expected.

The board holds four to five community linkages and student roundtables throughout the year as a way to connect with and listen to the community, students, families, partner organizations, professionals and others to receive input on The Bellingham Promise. The superintendent, administrators and staff attend the linkages to facilitate and record the community feedback. Under Policy Governance, the board must be responsive to all owners of the district, including property owners and voters, beyond the typical groups from which we hear, customers (i.e. parents and students) and employees.

STUDY SESSIONS
(scheduled four to five times per year, 1 – 2 hours)
Open to the public, but public may only observe, not ask questions. No board business. Board attendance expected.

At the board’s request, time is provided for more involved presentations and on specified topics from the superintendent and the executive team or an outside consultant. Study sessions typically occur prior to or following a regular board meeting that has a light agenda.

RETREATS
(scheduled twice per year, Jan./Feb, and Aug./Sept., 4 – 5 hours)
Open to the public, but public may only observe, not ask questions. No board business takes place. Retreats are scheduled on non-business meeting days at various locations. Board attendance expected.

The agenda is set by the board president with input from the superintendent and is focused on board governance and planning future meetings.
EXECUTIVE SESSIONS
(sporadic, 5 to 1.5 hours)
Advertised, but closed to the public and usually connected to a business meeting. Board attendance expected.

Legal stipulations (Open Public Meetings Act)
- Seven allowed topics — commonly real estate considerations, contracts and personnel matters.
- For deliberation and discussion only. Votes must be taken in public meeting.
- All discussion and specific topics must be kept confidential, including friends and family members.

SPECIAL EVENTS
High school graduation ceremonies in June, retirement dinners, groundbreakings, new facilities dedications/ribbon-cuttings, and all staff back-to-school kick off in August.

School board members are strongly encouraged to attend these special events in the school year and are personally rewarded for doing so. With five high school graduations — three comprehensive, one alternative and one Community Transitions — each board member is scheduled to be on stage and handout diplomas for two.

PUBLIC HEARINGS
(sporadic, 90 minutes)
Advertised and open to the public for presentations and direct public input. Held in appropriate school buildings, generally in the early evening. Board attendance is encouraged and expected at least once, if multiple hearings held.

Topics: school boundaries, budget, school closure, and others.

WASHINGTON STATE SCHOOL DIRECTORS (WSSDA)
Regional Meetings (twice per year, in evening with meal, 4 – 5 hours)
We are in WSSDA Region 1, comprised of the five counties served by the NW Educational Service District #189, Whatcom, Skagit, Snohomish, Island and San Juan. Meetings are held at one of the 35 school districts in Region 1 or the ESD office (Anacortes). Board attendance optional.

These meetings are professional development opportunities, typically with a study session, followed by a dinner, an update from WSSDA staff and staff of the Office of the Superintendent of Public Instruction (OSPI), and then an open discussion among all the participants.

WSSDA ANNUAL CONFERENCE
(the week before Thanksgiving, 3 – 4 days)
Site alternates between Seattle/Bellevue (odd years, Thurs. – Sun.) and Spokane (even years, Wed. – Sat.), with special early bird sessions for new board members on the first day. All board members and the superintendent are strongly encouraged to attend.

The conference is the premier in state educational and networking event for school directors and superintendents.

WSSDA ANNUAL LEGISLATIVE CONFERENCE
(one day, Sunday 1 p.m. – Monday 1 p.m. in Jan., Feb. or Mar.)
Held in Olympia during the current Legislative session, this conference is also sponsored by Washington Association of School Administrators (WASA) & Washington Association of School Business Officials (WASBO). It involves educational updates from legislators, the governor, OSPI and the three sponsoring professional associations and advocacy time with our 40th and 42nd District Legislators in their offices. All board members and the superintendent are strongly encouraged to attend.

NATIONAL SCHOOL BOARD ASSOCIATION (NSBA)
Annual Conference (3 days Sat. – Mon., in Mar. or Apr.)
Held in major city convention halls around the country, this is the premier school board conference that brings in some of the biggest names in education and nationally known speakers. There are restrictions on attendance and a report to the board is required upon return. All board members are strongly encouraged to attend at least once during each four-year term.
INTERNATIONAL BACCALAUREATE (IB)
Conference of the Americas (4 days)
Held annually in major cities of the Western Hemisphere, typically in July. There are restrictions on attendance and a report to the board is required upon return. Attendance is optional for board members who seek in depth background on the middle years and diploma IB programs not available in the district.

Meetings and contact with the public

OFFICIAL CHANNELS FOR CONTACT:
All board members at once: Listening Post email contact through district website

- Not for two-way communication, however the president or superintendent do reply with an acknowledgement and information on to whom concerns should be addressed, if indicated.

Individual board members: Telephones listed in the Board Profiles on the district website.

The board's group email address is board@bellinghamschools.org. This email address is publicized on the board's webpage as a listening post alternative. It goes to the entire board and superintendent. While we have individual board email addresses for internal communication, we are elected at large and have chosen joint communication methods.

If a board member receives an individual email from a staff, parent or community member to their district account, the board member should reply and cc the superintendent and board president, if appropriate, or forward to the superintendent and board president for assistance with a response.

UNOFFICIAL CHANNELS
If you are contacted through your private email, these email communications about the district should be forwarded to your district email first and replied through your district email address. This allows for retention of records through the district, not your private computer. See Public Records Act. Any email or text messages relating to school board business can be requested by a member of the public. If you use your computer or cell phone for these purposes they are subject to search.

SUGGESTED PROTOCOL FOR INTERACTION
Listen attentively and make no promises to intervene. Encourage interaction at lowest level, starting with the classroom teacher, next principal, assistant superintendent of Teaching and Learning and Superintendent.

Report concerns to the superintendent.

LEVIES, BONDS, AND OTHER POLITICAL COMMUNICATIONS
The operational, technology and transportation levies comprise more than 30 percent of the district's budget and require 50 percent +1 voter support. Bonds pay for school buildings, land or facility improvements and require 60 percent +1 voter approval. Both levies and bonds have historically received significant voter support.

The district may provide factual information to voters, but not advocate for citizens to vote for or against levies and bonds. District and board resources (email, phones, etc.) may not be used for campaign purposes. Once the board passes a levy or bond resolution, board members and district employees may use their own time, resources and devices for campaign purposes. Levy and bond campaigns are led by Citizens for Bellingham Schools, a community-run organization.
School Board

Board officers and committees

The board president is elected by a majority of the board during the first meeting in December. Typically, the board president was the vice president the year before. The duties of the Board President include being the spokesperson for the board, presiding over regular board meetings, planning two retreats and leading the superintendent’s annual performance review in June.

The board vice president is elected by a majority of the board during the first meeting in December. The duty of the vice president is to fill-in for the president in his or her absence from any board meeting.

Legislative representative is a board position appointed by the president. Typically, the person appointed has expressed a particular interest in advocacy and legislative affairs. The legislative representative’s responsibilities include following state and federal legislation more closely and drawing the attention of the other board members to proposed legislation involving education issues. In addition, the legislative representative is the board’s representative to WSSDA regarding legislative actions and attends, if possible, WSSDA’s Legislative Assembly alternating between SeaTac and Spokane over Fri.-Sat. in late September.

Committees: From time to time the board establishes working committees consisting of board members. Committee assignments are ad hoc and are populated with two board members who have an interest in advancing the positions of the district in a particular area, except for the superintendent review committee.

CURRENT COMMITTEES INCLUDE:
- County and City Council Liaison Committee
- Superintendent Contract Review and Negotiation: This committee is made up of the board president and immediate past president, with the immediate past president taking the lead.
- Board Manual: review annually and make update recommendations
- Policy Governance Enhancement: lead review and updates to all policies

Board technology use

All board members are provided a Bellingham Public Schools email address for all school board related communication to better comply with the state Open Public Meetings Act, Public Records Act and records retention law and rules. While the district board email addresses are not withheld from the public, they currently are not published openly on the district website under the Board section. This is only intended to encourage the use of the Listening Post to assure that all board members uniformly receive concerns or comments from the public.

All board members will be loaned district technology devices for board work. Using district technology is driven by the Public Records Act and records retention law and rules. Board members should use only their district-issued technology devices and email accounts for all school-, district- and board-related communications. Board members should not use personal devices or email accounts for board work. Similarly, district technology checked out to a board member should only be used for board-related business. While occasional personal use is permissible, use of the technology for money making endeavors is strictly prohibited. The use of district technology is a privilege. Do not use the technology in a manner that will bring disrespect to the district or the board.

Technology that is available for board checkout: smartphones, tablets, and laptop computers. When checking out equipment you are required to sign appropriate documentation indicating that you understand your rights and obligations regarding using the equipment and returning it upon leaving the board.

Board travel, reimbursement and compensation

Board members are reimbursed for travel to out of town meetings and conferences. Hotels are reimbursed at the rate of the conference hotel. Meals and mileage are reimbursed at the standard Washington state per diem rate.

A district issued credit card is available to expedite reimbursement. District credit cards may only be used for reimbursable travel related expenses, not including meals.
Board compensation

Board members may be reimbursed $50 per meeting, not to exceed $4,800 per year. To request reimbursement, a board member must turn in the reimbursement form no later than 28 days after the end of the month for which reimbursement is sought. A board member has the right to waive all reimbursement.

Employee groups and staff structure

A newcomer to employee groups might miss the significance of “non-represented” vs. “represented” in the heading of each of these groups. “Represented” refers to groups of employees who belong to a union that represents them in contract bargaining. “Non-represented” are employees not in a formal labor organization.

View the Central Services Organizational Chart.

EXECUTIVE TEAM
Administrative staff non-represented

- superintendent and deputy superintendent
- assistant superintendent
- chief officers
- executive directors

ADMINISTRATION
Administrative staff represented by Bellingham Administrators Organization (BAO)

- principals and assistant principals
- District Office directors and assistant directors

CERTIFICATED
Instructional staff represented by Bellingham Education Association (BEA) — employees who hold a professional education certificate

- teachers
- librarians
- counselors
- school nurses
- therapists (occupational, physical, speech, language)
- specialists (autism, early childhood, deaf/hard of hearing, visually impaired)
- psychologists

CLASSIFIED
Represented by Bellingham Association of School Employees (BASE) — employees who do not hold a professional education certificate

- school and some district administrative assistants, office assistants, paraeducators
- LPN, interpreter, bralllist
- print shop operator/Assistant
- childcare coordinator/career vocational guidance assistant
- theatre program technician

TEAMSTERS
Staff represented by General Teamsters Local Union 231

- bus drivers
- mechanics/shop foreman
- service specialists
- warehouse delivery
- dispatchers
- utility drivers/trainees

SEIU
Staff represented by Service Employees International Union 925

- custodians/head custodians
- food service leads/assistants
- maintenance staff (journeyman trades)
- grounds/equipment
- educational technology staff

PROFESSIONAL TECHNICAL STAFF
Non-represented

- Many district office staff (executive administrative assistants, specialists, coordinators, supervisors, managers)
Finances

In addition to state funding, school districts receive funding from the federal government, local taxes, and other miscellaneous sources. The budget of the Bellingham Public Schools is comprised of five funds: General Fund, Capital Projects Funds, Debt Service Fund, Associated Student Body Fund and the Transportation Vehicle Fund. See the most recent year's Budget Report on the district website for more details.

The General Fund is the largest and most important of the five funds. This fund provides for the daily operations of the district. It is utilized to provide for teaching and support activities, basic, special, vocational, English language learners, remedial, highly capable education; library; counseling; and health-related services. It is also used to finance support services, including transportation, food services, custodial services, building maintenance, utilities, insurance, printing, information systems and warehousing distribution. The remainder of the General Fund expenditures provides leadership/administrative service support to instructional and operational programs. These support service include school principals, instructional and operational supervision, human resources, accounting payroll, auditing, legal, communications, and superintendent office support.

The Capital Projects Fund is used to finance and pay for capital improvements. These include land acquisition, new construction and major improvements to existing facilities. This is usually financed by the sale of bonds, state construction assistance revenues, interest earnings, impact fees and special levies. By far the greatest source of revenue, nearly 97%, is from the sale of local bonds. Bond sales also provide the needed money upfront, whereas state construction assistance funds arrive after construction.

The Debt Service Fund accounts for the accumulation of resources for the payment of the principal and interest on bonds sold to fund capital improvements in the Capital Projects Fund.

Associated Student Body (ASB) Fund: Bellingham Public Schools' students have organized associated student bodies at four middle and three high schools. The financial resources of the ASB Fund are for optional non-credit extracurricular events of a cultural, social, recreational or athletic nature.

Transportation Vehicle Fund accounts for the purchase, major repair, rebuilding and related debt service incurred for school buses.
Laws & Regulations

Key Washington state laws and regulations impacting school boards (RCWs & WACs)

LEGAL BASIS FOR SCHOOL BOARDS

School Boards in Washington state have legal powers, duties and responsibilities derived from state statute and regulation. These are the Revised Code of Washington (RCW) and the Washington Administrative Code (WAC).

RCWs are statutes, or laws, passed by the state legislature or by vote of the people (legislative branch).

WACs are administrative regulations, or rules, adopted by state agencies (executive branch).

Both RCWs and WACs legally bind the district. Key sources include:

- School code (Title 28A RCW);
- Attorney general’s opinions, regulations of the state board of education (Title 180 WAC); and
- Regulations of the state superintendent of public instruction (Title 392 WAC).

See Board Operating Polices and 1000 Series.

FILING AND ELECTIONS:

Whatcom County Auditor, General Election information.

Public Disclosure Commission (PDC)

- Reporting requirements for election campaigns: Within two weeks of becoming a candidate
- Annual Personal Financial Affairs Statement: must be completed by April 15 (Tax Day), either electronically or by mail, even if you filed the year before as a candidate.

OPEN PUBLIC MEETINGS ACT (OPMA):

The Open Public Meetings Act (OPMA) found under Chapter 42.30 RCW limits board member communication, including email and text messages, concerning any district-related “action” outside of business meetings to only one-on-one, except for scheduling of meetings and conferences. Discussion among three or more board members counts as a “meeting” under the OPMA, and thus violates the OPMA unless the discussion takes place at an official and properly noticed meeting (or in a closed session not subject to the OPMA). A “meeting” under the OPMA includes email “replies to all,” or among three or more board members, discussing agenda items or other district business. It also includes discussions among three or more board members in other contexts, such as in person or by phone. “Action” is broadly defined as not just a vote on a motion, but the transaction of official business, including receipt of public testimony, deliberations, discussions, considerations, reviews, evaluations and final actions.

Individual board members, who attend a meeting where a violation of the Act occurs, and know the OPMA is being violated, may be subject to a $100 civil fine, and the district may be responsible for payment of the legal fees of a complaint filer.

PUBLIC RECORDS ACT (PRA)

The Washington Public Records Act (PRA) under Chapter 42.56 RCW is a law designed to guarantee that the public has access to public records of government bodies at all levels in Washington. Anyone can request records and a statement of purpose is not required, nor are there restrictions placed on the use of records. The Washington Public Records Act allows five days for records responses; board members should immediately forward all public records requests received to the public records officer.

Any email or text messages relating to school board business can be requested by a member of the public. If you use your computer or cell phone for these purposes they are subject to search. Furthermore, school-related electronic communication with other board members, staff or the public must be retained for several years. For this reason, the district has a policy that all board-related electronic communications occur on district-provided computers, tablets and
smartphones using the district’s email service to provide archiving and ready searching for requested records.

OPEN GOVERNMENT TRAINING ACT
The Open Government Training Act, ESB 5964, requires board members to receive training in the Public Records Act, the Open Public Meetings Act, and records retention laws and rules. This mandatory training will provide you with additional guidance on complying with the state’s open government laws. New board members must receive the training within ninety days of taking office, and all board members must take a refresher training at least every four years.

Resources: Training provided at the November WSSDA Conference and free online by the WA Attorney General Office.

GROUNDS FOR CENSURE OR REMOVAL OF BOARD MEMBERS
Censure is an expression of board disapproval concerning the actions of an individual member. Service as a board officer is a privilege and not a right, so board officers can be removed from their office position by a majority vote of the board. The Board of Directors cannot remove individuals from the board itself except in cases of excessive absenteeism, defined as missing four consecutive board meetings. Reference: RCW 28A.343.390; See local governing policies for processes, specifically the process for addressing board member violations.

CONFLICT OF INTEREST (RCW 42.23.030)
A conflict of interest is considered to exist whenever a board member is or may reasonably appear to be in a position to request or receive, directly or indirectly, anything of value for or on account of his or her influence as a member of the Board of Directors.

2012 CHARTER SCHOOL LEGISLATION:
Initiative I-240, approved by the voters at the November 2012 general election, assigns major responsibilities to the State Board of Education for implementation and oversight of the state’s new charter schools law. The initiative is codified as RCW 28A.710.

The law required the State Board of Education, by March 6, 2013, to establish an annual application approval process and timelines for school districts wishing to be authorizers of charter schools. The Board is also responsible for producing an annual report on charter schools for the preceding year.

A Washington Supreme Court decision in 2015 invalidated the state’s funding of charter schools without oversight by a publicly elected board, leading to patchwork financing legislation in 2016 that may not be successful.

VOLUNTEER APPLICATION PROCESS
All board members will work with human resources to follow our volunteer application process and instructions. All volunteers are required to complete the online application which includes a disclosure statement, review of policies and procedures and submission of picture identification. This information is used to perform a background check through Washington State Patrol.

Federal education legislation
Federal funding includes Title I resources that support high-poverty populations.

The Individuals with Disabilities Education Act (IDEA) was last reauthorized in 2006. It provides funding for special education support.

The Elementary and Secondary Education Act (ESEA), formerly “No Child Left Behind,” was reauthorized in Nov. 2015 and is now called “Every Child Succeeds Act.” The new act provides more state control of learning and professional standards and removal of onerous punitive federal controls for missing impossibly high standards “for every child.” It provides funding for high-poverty Title I schools.

Common Core State Standards: National in scope, but not actually federally mandated, it was developed by a conference of State Governors & State Chief School Officers, including our OSPI, from 45 states & DC.
Governmental and non-governmental education agencies supporting public schools

STATE

WSSDA:
As defined and required by law, board members are members of the Washington State School Directors' Association. WSSDA is authorized in state law to be self-governing. This body supports professional development of board members, including advocating for public education at the state and federal levels.

WSSDA holds a delegate assembly during the annual November conference. That assembly establishes and maintains WSSDA's bylaws, adopts the association's position on non-legislative issues and approves membership dues. The school district has one voting delegate (the Legislative Rep) at that meeting and at the WSSDA legislative assembly held in late September. That group establishes WSSDA's legislative priorities during the upcoming school year.

School boards may legally lobby for legislation and initiatives and join in lawsuits aimed at improved funding for public education by the state. Boards may not support individual candidates for public office.

WASA (WA ASSOC. OF SCHOOL ADMINISTRATORS):
WASA's membership includes more than 1,604 members and is open to all K-12 educational administrators in central office, building management, and educational agency positions. It provides professional development and promotes community and legislative support for education.

OSPI (OFFICE OF SUPERINTENDENT OF PUBLIC INSTRUCTION):
OSPI is the primary agency charged with overseeing K-12 public education in Washington state. Led by a State School Superintendent, OSPI works with the state's 295 school districts to administer basic education programs and implement education reform on behalf of more than one million public school students. OSPI is housed in the Old Capitol Building in Olympia.

The state, through OSPI, supervises school district budgeting, accounting and financial reporting. The state auditor works with OSPI to audit our budget once a year. OSPI collects data on schools and operations and is tasked with developing a school report card for each school in the state.

SBE (STATE BOARD OF EDUCATION):
The mission of the State Board of Education is to lead the development of state policy, provide system oversight, and advocate for student success. The state board of education consists of sixteen members: seven members appointed by the governor; five members, including two from eastern Washington and three from western Washington, elected by the members of public school boards of directors; one member elected by approved private school boards of directors; the superintendent of public instruction; and two student representatives selected by the state board of education.

NWESD (NORTHWEST EDUCATIONAL SERVICE DISTRICT) #189:
The NWESD 189 provides leadership and cooperative services to thirty-five (35) school districts in Whatcom, Skagit, San Juan, Island and Snohomish Counties.

WA DEL (WASHINGTON DEPARTMENT OF EARLY LEARNING):
The Department of Early Learning (DEL) strives to help create safe, healthy, nurturing learning experiences for all Washington children. DEL focuses on the earliest years in children's homes, child care, school programs and communities. It offers information and resources for children's first and most important teachers — parents — as well as others who care for and teach young children.

WSAC (WASHINGTON STUDENT ACHIEVEMENT COUNCIL):
By reorganization of the Washington Higher Education Commission, the Washington Student Achievement Council was established as a cabinet-level state agency on July 1, 2012. WSAC provides strategic planning, oversight and advocacy to support increased student success and higher levels of educational attainment in Washington.
NATIONAL & INTERNATIONAL
NSBA (NATIONAL SCHOOL BOARD ASSOCIATION)
NSBA represents school boards on a national level. They believe that public education is America's most vital institution. NSBA has five goals: 1) Member service culture and relationships, 2) School board leadership, 3) Advocacy, 4) Support for Public Education, and 5) Infrastructure. NSBA has a wealth of information on its website and organizes an annual conference in the spring.

IB (INTERNATIONAL BACCALAUREATE)
IB has four programs to help children from ages three to 19 develop intellectual, personal, emotional, and social skills to live, learn, and work in today's global society. They promote intercultural understanding and respect. All children are taught a second language and learn how to develop research skills. IB takes advantage of children's natural curiosity through inquiry-based learning. At the end of fifth grade, each child shows what they've learned through research on a specific topic of their choosing by giving a small group presentation.

Currently, Bellingham Public Schools has the Primary Years Programme (PYP) at Alderwood, Birchwood, Carl Cozier, Columbia, Northern Heights and Wade King elementary schools. Happy Valley, Lowell and Roosevelt elementary schools are exploring the program. IB also offers a middle years program, a diploma program and a career-related certificate program. There are IB schools in 147 countries.
Summary of References

WSSDA http://wssda.org/

NSBA http://www.nsba.org/

PUBLIC DISCLOSURE COMMISSION
For candidates and officeholders, filing requirements and forms available online
http://www.pdc.wa.gov/
- When to file http://www.pdc.wa.gov/filers/candidates/localandjudicial.aspx
- How to file http://www.pdc.wa.gov/filers/forms/candidateforms.aspx

POLICY GOVERNANCE
- From John Carver, creator of the model http://carvergovernance.com/model.htm
- For an easy read, try Gene Royer's School Board Leadership http://www.carvergovernance.com/pubs.htm

THE BELLINGHAM PUBLIC SCHOOLS' MODEL IN ACTION
- http://bellinghamschools.org/about/school-board/policy-governance/
- http://bellinghamschools.org/about/school-board/policy-governance/governance-process-policies/
- http://bellinghamschools.org/about/school-board/policy-governance/ends-policies/
- OSPI http://www.k12.wa.us/
School Board Members since the 1950s

1952-53
Calhoun, Rev. W. Carl
Hilliard, G. R.
Arnason, H. G.
Boyd, Arthur J.
Sharninghouse, R. G.

1953-54
Calhoun, Rev. W. Carl
Hilliard, G. R.
Arnason, H. G.
Boyd, Arthur J.
Sharninghouse, R. G.

1954-55
Arnason, H. G.
Boyd, Arthur J.
Grimes, Kern
Parrott, John
Sharninghouse, R. G.

1955-56
Arnason, H. G.
Boyd, Arthur J.
Blair, Douglas
May, Catherine
Sharninghouse, R. G.

1957-58
Arnason, H. G.
Boyd, Arthur J.
Blair, Douglas
May, Catherine
Sharninghouse, R. G.

1958-59
Blair, Douglas
May, Catherine
Arnason, Hal Jr.
Mason, James
Whipple, Rev. Grant

1960-61
Blair, Douglas
May, Catherine
Arnason, Hal Jr.
Mason, James
Whipple, Rev. Grant

1961-62
Blair, Douglas
May, Catherine
Arnason, Hal Jr.
Mason, James
Whipple, Rev. Grant

1962-63
Blair, Douglas
May, Catherine
Arnason, Hal Jr.
Mason, James
Whipple, Rev. Grant

1963-64
Blair, Douglas
May, Catherine
Arnason, Hal Jr.
Mason, James
Whipple, Rev. Grant

1964-65
Blair, Douglas
May, Catherine
Arnason, Hal Jr.
Mason, James
Whipple, Rev. Grant

1965-66
Blair, Douglas
May, Catherine
Arnason, Hal Jr.
Mason, James
Mintz, Dave

1966-67
Blair, Douglas
May, Catherine
Arnason, Hal Jr.
Mason, James
Mintz, Dave

1967-68
Blair, Douglas
May, Catherine
Arnason, Hal Jr.
Mason, James
Mintz, Dave

1968-69
Arnason, Hal Jr.
May, Catherine
Blair, Douglas
Mintz, Dave
Crawford, R. R.

1969-70
Arnason, Hal Jr.
May, Catherine
Blair, Douglas
Converse, William
Dahlgren, Edward

1970-71
Arnason, Hal Jr.
May, Catherine
Blair, Douglas
Converse, William
Dahlgren, Edward

1971-72
Dahlgren, Edward
Converse, William
Radke, Carol
Arnason, Hal Jr.
Jeppson, Ronald T.

1972-73
Dahlgren, Edward
Converse, William
Radke, Carol
Arnason, Hal Jr.
Jeppson, Ronald T.

1973-74
Radke, Carol
Jeppson, Ronald T.
Dahlgren, Edward
Arnason, Hal Jr.
Freeman, James

1974-75
Radke, Carol
Jeppson, Ronald T.
Arnason, Hal Jr.
Freeman, James
Uhrig, Frank G.

1976-77
Radke, Carol
Jeppson, Ronald T.
Uhrig, Frank G.
Arnason, Hal Jr.
Freeman, James

1977-78
Radke, Carol
Jeppson, Ronald T.
Uhrig, Frank G.
Arnason, Hal Jr.
Freeman, James

1978-79
Radke, Carol
Jeppson, Ronald T.
Quehrn, William
Uhrig, Frank G.
Arnason, Hal Jr.
Freeman, James

1979-80
Radke, Carol
Quehrn, William
Uhrig, Frank G.
Arnason, Hal Jr.
Freeman, James

1980-81
Radke, Carol
Quehrn, William
Uhrig, Frank G.
Arnason, Hal Jr.
Freeman, James

1981-82
Radke, Carol
Quehrn, William
Uhrig, Frank G.
Arnason, Hal Jr.
Freeman, James
<table>
<thead>
<tr>
<th>Year</th>
<th>Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>1982-83</td>
<td>Radke, Carol&lt;br&gt;Quehr, William&lt;br&gt;Uhrig, Frank G.&lt;br&gt;Amason, Hal Jr.&lt;br&gt;Freeman, James</td>
</tr>
<tr>
<td>1983-84</td>
<td>Radke, Carol&lt;br&gt;Trimingham, Susan&lt;br&gt;Uhrig, Frank G.&lt;br&gt;Amason, Hal Jr.&lt;br&gt;Freeman, James</td>
</tr>
<tr>
<td>1984-85</td>
<td>Radke, Carol&lt;br&gt;Trimingham, Susan&lt;br&gt;Uhrig, Frank G.&lt;br&gt;Amason, Hal Jr.&lt;br&gt;Freeman, James</td>
</tr>
<tr>
<td>1985-86</td>
<td>Radke, Carol&lt;br&gt;Trimingham, Susan&lt;br&gt;Uhrig, Frank G.&lt;br&gt;Amason, Hal Jr.&lt;br&gt;Brandt, Philip (June 1985 - March 1986)</td>
</tr>
<tr>
<td>1986-87</td>
<td>Amason, Hal Jr.&lt;br&gt;Radke, Carol&lt;br&gt;Swenson, Mary (appointed March 1986)&lt;br&gt;Trimingham, Susan&lt;br&gt;Van Buren, Russell (appointed March 1986)</td>
</tr>
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<td>1987-88</td>
<td>Amason, Hal Jr.&lt;br&gt;Radke, Carol&lt;br&gt;Swenson, Mary&lt;br&gt;Trimingham, Susan&lt;br&gt;Van Buren, Russell</td>
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<td>1988-89</td>
<td>Amason, Hal Jr.&lt;br&gt;Radke, Carol&lt;br&gt;Swenson, Mary&lt;br&gt;Trimingham, Susan&lt;br&gt;Van Buren, Russell</td>
</tr>
<tr>
<td>1989-90</td>
<td>Amason, Hal Jr.&lt;br&gt;Radke, Carol&lt;br&gt;Swenson, Mary&lt;br&gt;Trimingham, Susan&lt;br&gt;Van Buren, Russell</td>
</tr>
<tr>
<td>1990-91</td>
<td>Amason, Hal Jr.&lt;br&gt;Radke, Carol&lt;br&gt;Swenson, Mary&lt;br&gt;Trimingham, Susan&lt;br&gt;Van Buren, Russell</td>
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<td>1991-92</td>
<td>McCain, Claudia&lt;br&gt;Stender, Mary&lt;br&gt;Swenson, Mary&lt;br&gt;Trimingham, Susan&lt;br&gt;Van Buren, Russell</td>
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<td>1992-93</td>
<td>McCain, Claudia&lt;br&gt;Stender, Mary&lt;br&gt;Swenson, Mary&lt;br&gt;Trimingham, Susan&lt;br&gt;Van Buren, Russell</td>
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<td>1993-94</td>
<td>McCain, Claudia&lt;br&gt;Stender, Mary&lt;br&gt;Trimingham, Susan&lt;br&gt;Blair, David&lt;br&gt;Challender, Mark</td>
</tr>
<tr>
<td>1994-95</td>
<td>McCain, Claudia&lt;br&gt;Stender, Mary&lt;br&gt;Trimingham, Susan&lt;br&gt;Blair, David&lt;br&gt;Challender, Mark</td>
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<tr>
<td>1995-96</td>
<td>Blair, David&lt;br&gt;Challender, Mark&lt;br&gt;Lynch, Elaine M.&lt;br&gt;Stender, Mary&lt;br&gt;Zagelow, Dick</td>
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<td>1996-97</td>
<td>Blair, David&lt;br&gt;Challender, Mark&lt;br&gt;Lynch, Elaine M.&lt;br&gt;Stender, Mary&lt;br&gt;Zagelow, Dick (resigned 5/97)&lt;br&gt;Whitmyer, Ann (appointed 5/8/97)</td>
</tr>
<tr>
<td>1997-98</td>
<td>Blair, David&lt;br&gt;Diaz, Becky&lt;br&gt;Lynch, Elaine M.&lt;br&gt;Stender, Mary&lt;br&gt;Whitmyer, E. Ann</td>
</tr>
<tr>
<td>2000-01</td>
<td>Blair, David&lt;br&gt;Gass, Kenneth B.&lt;br&gt;Leu, Donald J.&lt;br&gt;Lynch, Elaine M.&lt;br&gt;Whitmyer, E. Ann</td>
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<tr>
<td>2001-02</td>
<td>Blair, David&lt;br&gt;Haggen, Jeffrey C.&lt;br&gt;Lynch, Elaine M.&lt;br&gt;Schoenfeld, Stephen H.&lt;br&gt;Whitmyer, E. Ann</td>
</tr>
<tr>
<td>2002-03</td>
<td>Gass, Kenneth B.&lt;br&gt;Haggen, Jeffrey C.&lt;br&gt;Lynch, Elaine M.&lt;br&gt;Schoenfeld, Stephen H.&lt;br&gt;Whitmyer, E. Ann</td>
</tr>
<tr>
<td>2003-04</td>
<td>Gass, Kenneth B.&lt;br&gt;Haggen, Jeffrey C.&lt;br&gt;Lynch, Elaine M.&lt;br&gt;Schoenfeld, Stephen H.&lt;br&gt;Whitmyer, E. Ann</td>
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<tr>
<td>2004-05</td>
<td>Gass, Kenneth B.&lt;br&gt;Haggen, Jeffrey C.&lt;br&gt;Lynch, Elaine M.&lt;br&gt;Schoenfeld, Stephen H.&lt;br&gt;Whitmyer, E. Ann</td>
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<tr>
<td>2007-08</td>
<td>Gass, Kenneth B.&lt;br&gt;Bashaw, Kelly&lt;br&gt;Rhode, Melody G.&lt;br&gt;Schoenfeld, Stephen H.&lt;br&gt;Whitmyer, E. Ann</td>
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<tr>
<td>2008-09</td>
<td>Gass, Kenneth B.&lt;br&gt;Bashaw, Kelly&lt;br&gt;Rhode, Melody G.&lt;br&gt;Schoenfeld, Stephen H.&lt;br&gt;Whitmyer, E. Ann</td>
</tr>
</tbody>
</table>
2009–10
Gass, Kenneth B.
Bashaw, Kelly
Rhode, Melody G. (term ended 12/31/09)
Schoenfeld, Stephen H. (term ended 12/31/09)
Whitmyer, E. Ann

2010–11
Gass, Kenneth B.
Bashaw, Kelly
Whitmyer, E. Ann
Stockburger, Scott
Smith, Steven H.

2011–12
Gass, Kenneth B.
Bashaw, Kelly
Hackler, Camille Diaz
Stockburger, Scott
Smith, Steven H.

2012–13
Gass, Kenneth B.
Bashaw, Kelly
Hackler, Camille Diaz
Stockburger, Scott
Smith, Steven H.

2013–14
Gass, Kenneth B.
Bashaw, Kelly
Hackler, Camille Diaz
Stockburger, Scott
Smith, Steven H.

2014–15
Gass, Kenneth B.
Bashaw, Kelly
Benjamin, Douglas
Hackler, Camille Diaz
Smith, Steven H.

2015–16
Gass, Kenneth B.
Bashaw, Kelly
Benjamin, Douglas
Hackler, Camille Diaz
Smith, Steven H.

2016–17
Bashaw, Kelly
Benjamin, Douglas
Hackler, Camille Diaz
Peterson, Quenby M.
Smith, Steven H.

2017–18
Bashaw, Kelly
Benjamin, Douglas
Hackler, Camille Diaz
Mason, Jenn
Peterson, Quenby M.

2018–19
Bashaw, Kelly
Benjamin, Douglas
Hackler, Camille Diaz
Mason, Jenn
Peterson, Quenby M.

2019–20
Bashaw, Kelly
Benjamin, Douglas
Hackler, Camille Diaz
Mason, Jenn
Peterson, Quenby M.
Rose, Katie

2020–21
Bashaw, Kelly
Benjamin, Douglas
Hackler, Camille Diaz
Mason, Jenn
Rose, Katie

2021–22
Bashaw, Kelly
Benjamin, Douglas
Hackler, Camille Diaz
Mason, Jenn
Rose, Katie

2022–23
Bashaw, Kelly
Benjamin, Douglas
Hackler, Camille Diaz
Mason, Jenn
Rose, Katie
Bellingham Public Schools
a collective commitment

1306 Dupont Street
Bellingham, WA 98225

(360) 676-6400
bellinghamschools.org

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Katie Rose
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Greg Baker
Superintendent